Study on Digitalization to support the transformation of EBMOs as data-driven organizations in the Association of Southeast Asian Nations (ASEAN)

Acknowledgements

We would like to extend our warmest thanks to all the EBMOs who participated in this study representing the various ASEAN countries, including:

- Singapore National Employers Federation (SNEF)
- Malaysian Employers Federation (MEF)
- Cambodia Federation of Employers and Business Associations (CAMFEBA)
- Employers' Confederation of the Philippines (ECOP)
- Employers' Confederation of Thailand (ECOT)
- Lao National Chamber of Commerce and Industry (LNCCI)
- Vietnam Chamber of Commerce and Industry (VCCI)

The completion of this report could not have been accomplished without the support of ILO who commissioned the project and provided strong administrative and network support. We would also like extend our gratitude to SNEF for their support in the project, without which this project would not have been possible.

Prepared by:

CET Global Pte Ltd

Thomas Yeo, Project Director
Berenice Choong, HR Consultant
Maryam Bait Ali Sulaiman, HR Analyst

Table of Contents

Executive Summary 5
Introduction 6
Identification of EBMO Best Practices 6
Member Engagement 6
Formal Communications 7
Informal Communications 8
Resources 9
Services 9
Health Programme and Activities 11
Web Analytics & Tracking 13
Online and Social Media Presence 13
Process and Delivery 14
Training Provisions 15
Staff Digital Literacy / Proficiency 16
Methodology 16
Survey Design 16
Membership engagement 17
Online and social platforms presence 18
Process and delivery (internal and external) 19
Training provision 20
Staff digital literacy/proficiency 21
Survey Administration 21
Interview Design 22
Interview Administration 22
Findings 22
Overview of Survey 22
Findings by Dimension (across ASEAN) 23
Member engagement 24
Online and social platforms presence 28
Process and delivery (internal and external) 32
Training provision 37
Staff digital literacy/proficiency 42
Findings by Country 45
Singapore – Singapore National Employers Federation (SNEF) 45
Cambodia – Cambodian Federation of Employers and Business Associations (CAMFEBA) 54

Philippines – Employers Confederation Of The Philippines (ECOP) 63
Thailand – Employers' Confederation of Thailand (ECOT) 72
Laos – Lao National Chamber of Commerce and Industry (LNCCI) 74
Malaysia – Malaysian Employers Federation (MEF) 82
Vietnam – Vietnam Chamber of Commerce and Industry (VCCI) 91
Overview of Interviews 98
Singapore – Singapore National Employers Federation (SNEF) 99
Cambodia – Cambodian Federation of Employers and Business Associations (CAMFEBA) 99
Malaysia – Malaysian Employers Federation (MEF) 100
Philippines – Employers Confederation Of The Philippines (ECOP) 100
Vietnam – Vietnam Chamber of Commerce and Industry (VCCI) 101
Key Insights 101
Digital infrastructure of EBMOs in the region 101
Stable access to the internet 102
Purchase and maintenance costs of IT equipment and solutions 102
Individual digital skill levels and attitudes 102
Current status of digitalisation 103
Challenges faced to digitalise 104
Organizational transformation readiness for digital data-driven change 104
Limitations of Study 105
Improvements to Study Design 105
Mode of Reporting 105
Exploration of non-Participation 105
Improvements to Study Administration 105
Increase in Sample Size 105
Longer Administration Period 105
Communication Channels 106
Recommendations for digital transformation 106
Develop existing technological capabilities within organisation 106
Reviewing internal policies and mindsets 106
Low cost or free solutions 107
Funding support 108
Conclusion 109
Annexes 111
Appendix 111
D

Executive Summary

Digitalisation is becoming essential to businesses who not just want to survive but thrive in the current uncertain times. The purpose of the study was to understand ASEAN Employers' and Business Membership Organizations' (EBMO's) digitalisation capacity, readiness, and applications in the following five areas:

1. Membership engagement
2. Online and social platforms presence
3. Processes and delivery (internal and external)
4. Training provision
5. Staff digital literacy / proficiency

A 2-phase approach of data collection consisting of a survey followed by an interview with key EBMO stakeholders was conducted to gather broad insights followed by exploring key topics and challenges faced in greater depth.

Findings indicated that while most EBMOs were keen to embark on digitalisation, however cost, manpower capability, and security concerns were three main factors that deterred ASEAN EBMOs from embarking on the digitalisation journey.

Other factors that were of concern included limited digital infrastructure at the national level (i.e. poor network coverage and speed), resistance towards digitalisation efforts from member organisations (i.e. some prefer physical rather than virtual programmes), and reliance on a few select key staff who were digitally-savvy for majority of digitalisation efforts.

Hence recommendations to support digitalisation efforts for EBMOs include developing technological capabilities within the organisation, which can range from providing funding for purchase of licenses, to providing software itself, and training for software usage. Policy review may also be necessary to provide the necessary structures to guide usage within the organisation in a secure manner, as well as organisational culture mindset change to persuade staff to embrace digitalisation and reduce the barriers to learning new technologies and processes. The last recommendation was to use low cost or free options available on the public domain currently, but that can only be done if the EBMO has robust policies that will prevent such free alternatives from being misused or becoming a security risk to the organisation.

Introduction

Digitalization will be one of the priorities for Employers' and Business Membership Organizations (EBMOs) in the post-COVID era. This is of paramount importance as getting this right holds the key to delivering effective member services which will in turn drive retention and new member acquisition, increasing sustainability and growth for EBMOs. It is also a means of amplifying advocacy voice, driving innovative campaigns, and finding new ways of showcasing the positive role of business in society. Harnessing digital technology is also a means of driving internal efficiencies, developing better processes, and enhancing productivity.

Hence the study was designed to conduct a regional scoping exercise to take stock of digital infrastructure of EBMOs in the region with a view to make steps forward in their efforts for digital transformation.

The study will assess organizational transformation readiness for digital data-driven change, particularly analyzing the mindsets, practices, and resources in order to understand where EBMOs are at in their journey and document how digitalization is taking place in EBMOs and understand the challenges they are experiencing in becoming more digital organizations.

As a result, 5 dimensions where digitisation can occur were identified as follows:

1. Member engagement
2. Online and social platforms presence
3. Process and delivery (internal and external)
4. Training provision
5. Staff digital literacy/proficiency

An analysis of an identified industry leader was used to define best practices in ASEAN EBMOs, and subsequently a survey was designed to further define each dimension into measurable components and was administered to representative ASEAN EBMOs. Survey findings were consolidated by country, and this was followed up with an interview with key stakeholders from each EBMO to explore more on survey findings. Lastly findings were consolidated into a report with insights on the current status of digitalisation, challenges faced to digitalise, and recommendations for digital transformation.

Identification of EBMO Best Practices

In the ASEAN region, Singapore was identified to have the best state of digitalisation, and was used as a reference benchmark for the other countries in the study. To identify the good practices of the Singapore EBMO - Singapore National Employers Federation ("SNEF") on its digitalisation capacity, readiness and applications, a desktop review was conducted in the survey on SNEF's digitalisation capacity, readiness and applications via its website and its affiliated sites, such as social media. Further questions were asked to clarify doubts and gain further insights to compare digitalisation efforts with other EBMOs during the subsequent interview phase.

Member Engagement

SNEF has made much effort to engage their members using digital methods.

Formal Communications

Both members and non-members may sign up for the mailing list subscription[1] on the main website[2] (the "Website"). Electronic Direct Mails (EDMs) are sent to update subscribers about free talks, limited time offers, compliance updates, course updates, and other upcoming events.

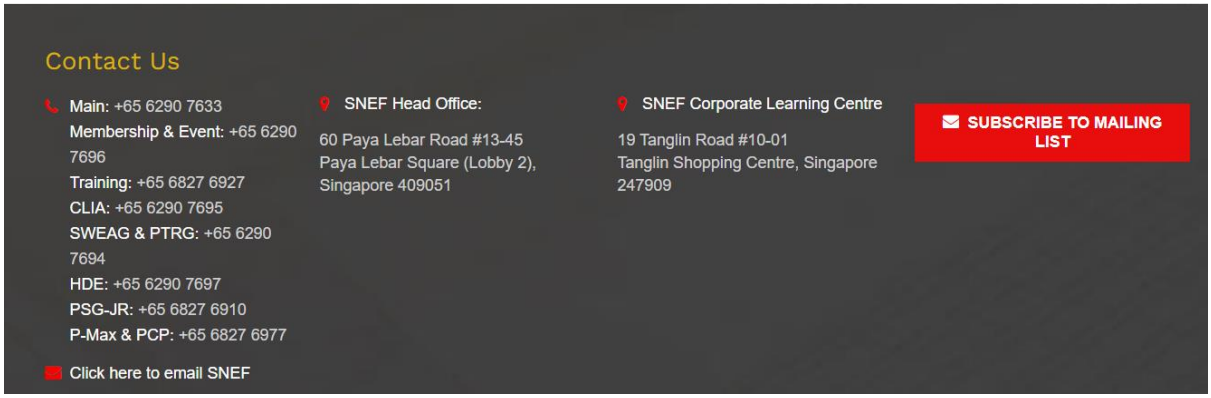


Image 1. Contact information of SNEF.

SNEF also uses social media such as LinkedIn and Facebook to complement information sharing on its website, sharing updates regularly.

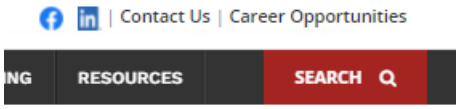


Image 2. Social Media links on SNEF website.

For enquiries, contact information of the relevant departments and an online enquiry form is available[3].

[1] https://snef.org.sg/subscribe-to-mailing-list/
[2] www.snef.org.sg
[3] https://snef.org.sg/contact-us/

-

LOCATE US

SNEF Head Office

60 Paya Lebar Road #13-45
Paya Lebar Square (Lobby 2), Singapore 409051

SNEF Corporate Learning Centre

19 Tanglin Road #10-01
Tanglin Shopping Centre, Singapore 247909

CONTACT INFORMATION

SNEF Head Office	Number	SNEF Corporate Learning Centre	Number
Main Line	6290 7633	Training	6827 6927
SWEAG & PTRG	6290 7694	P-Max & PCP	6827 6977
HDE Hotline	6290 7697	PSG-JR	6827 6910
CLIA Hotline	6290 7695		
Membership & Event Hotline	6290 7696		

ENQUIRY FORM

Your comments and feedback is valuable to us. Please use the form below and we will respond within three working days.

Company*

Full Name*

Email Address*

Re-type Email*

Subject* ---

Enquiry*

3000 Characters Left

SUBMIT

Image 3. SNEF contact information and online enquiry form.

There are works in the pipeline for a member-only portal, tentatively named ‘SNEF Insights’, set up by SNEF’s research department. This added channel will enhance communications between members and SNEF, allowing members to enjoy increased privacy and protection when they consult SNEF with their sensitive questions and issues.

Informal Communications

Members are categorised according to their industries and are placed into 1 of 26 sectors. A consultant from SNEF oversees a few sectors and regularly liaises with representatives from their member organisations via WhatsApp groups, meeting up with them for consultations, discussions, reviews, and evaluations on a need-basis. There were small group gatherings and in-person meetings prior to the pandemic, but now meetings are mostly virtual.

In the future, SNEF may implement chatbot capabilities on the website.

Resources

A compilation of useful advisories, guidelines, news releases and updates[4] can be found on the website, allowing members and the public to refer to for their knowledge.

Services

SNEF provides the following services as stated on the Website:

a. Centre for Labour Information and Analytics (CLIA)[5]
   Employers may access reliable Economic, Labour and Human Resource information. Also provided are information, benchmark and analysis for Total Rewards, Talent Management and have data collected from Collective Agreements. Members are also provided with exclusive services such as Information Requests, Compensation/Benefits Projects, and Workforce/Workplace Related Survey Projects. Organisations may take part in surveys by downloading the survey form and submitting them via email.

b. Consultancy

   The key exclusive benefit offered to SNEF members is managing industrial relations and providing HR consultancy services (legal compliance, ethics, related issues) ("Industrial & Workplace Relations services" or "IWR"). IWR may be rendered F2F, through emails or on the phone.

c. Grants
   Information of various grants administered by SNEF that improve employee capabilities and welfare are readily available[6]. Links to details are given clearly.

d. Training

   Events and Training calendars can be found on the Website. Special rates and discounts[7] may be given to SNEF members for training courses and workshops, in addition to funding information for certain courses.

Image 4. Events and Training Calendar on SNEF website.

[4] https://snef.org.sg/resources/
[5] https://snef.org.sg/clia/
[6] https://snef.org.sg/incentives/
[7] https://snef.org.sg/training/snef40/SNEF_40th_Anniversary_Specials_by_SNEF_Corporate_Learning_Centre.pdf

To engage other members to attend useful workshops and training sessions, online testimonials and success stories are shared on the Website[8].

'Training provision' matters will be covered below.

e. Membership[9]
Organisations may sign up for a membership via a downloadable form from the Website and sending the application in via email[10]. Any change to company information and representative details may be made via email[11].

There is a "Membership Calculator" on the Website to help members calculate the membership fee for their organisations, depending on the number of employees they have.

[8] https://snef.org.sg/training/testimonials-success-stories/
[9] http://snef.org.sg/membership/benefits-and-servicecs-which-you-can-enjoy-as-a-member/
[10] https://snef.org.sg/wp-content/uploads/2021/01/SNEF-Membership-Application-Form-Ordinary-Member.docx
[11] https://snef.org.sg/membership/members-information-update/

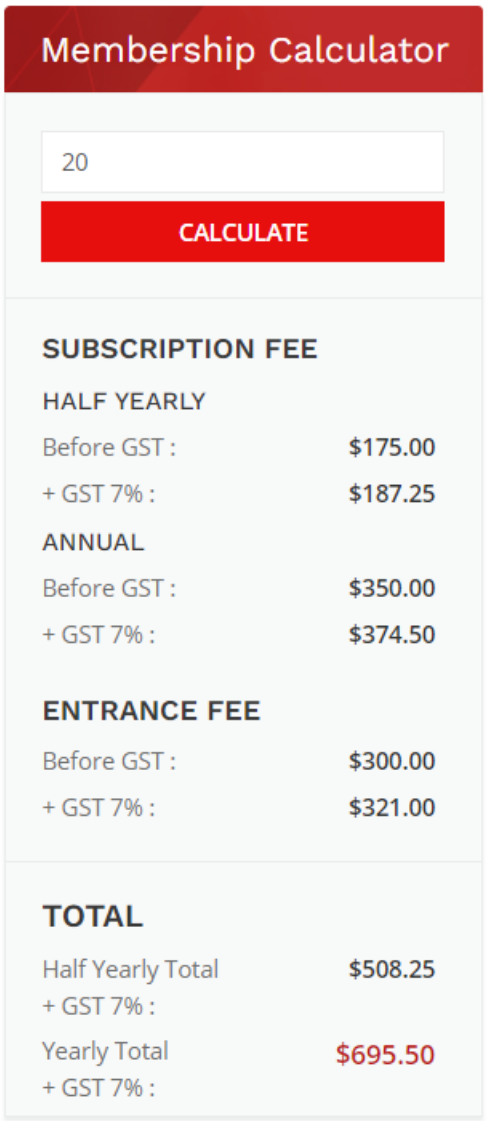


Image 5. Membership Calculator on SNEF website.

Members and the public alike can access the Members Directory[12] to see which other organisations are also members of SNEF.

Health Programme and Activities

SNEF engages members by partnering with third parties (e.g. Health Promotion Board) to provide various health promotion programmes and initiatives to some workplaces. Bookings of these sessions may be done online through Eventbrite and/or through Healthy365 app.

[12] https://snef.org.sg/membership/members-directory/

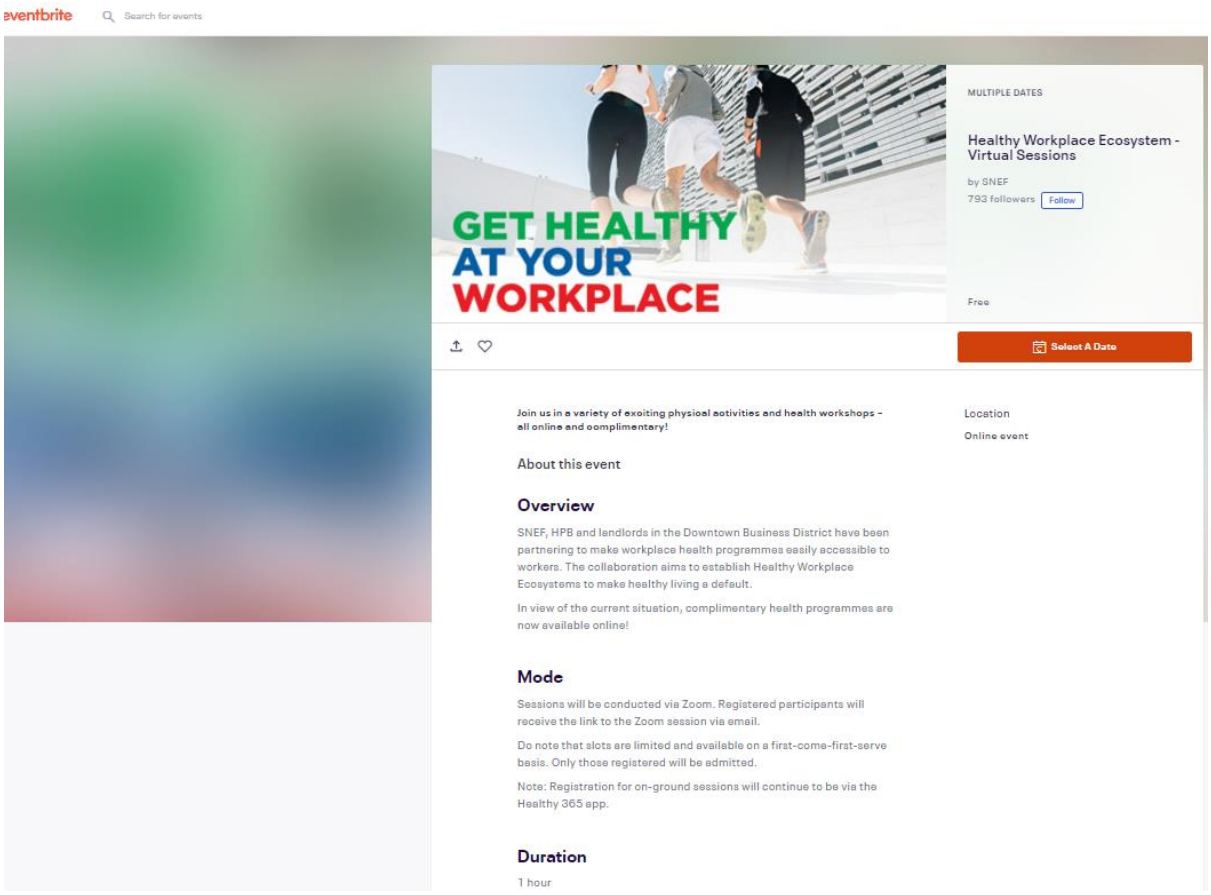


Image 6. Access to Healthy Workplace Ecosystem event on Eventbrite.

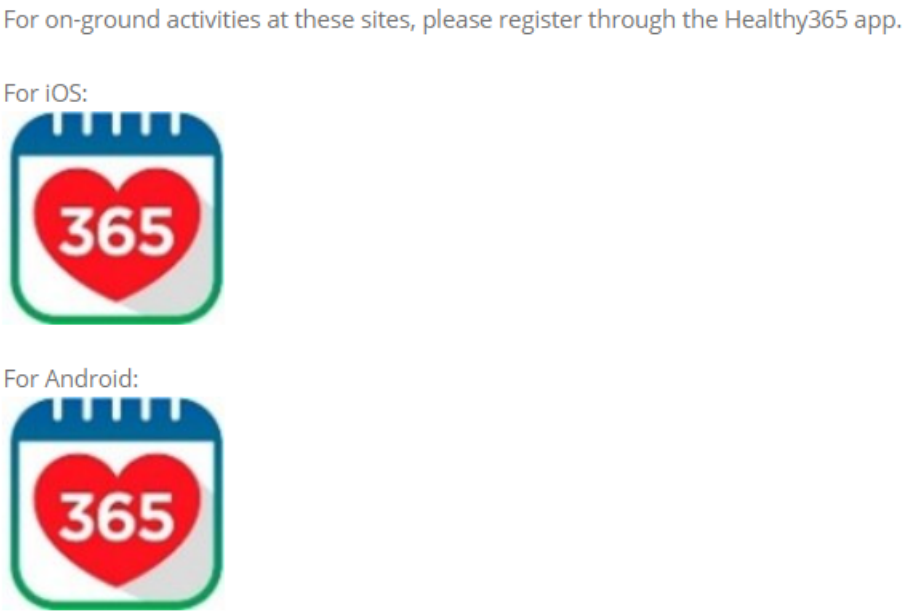


Image 7. Registration to events through the Healthy365 application.

In view of Covid-19, health programmes are now available via Zoom. Other health talks and related resources are also available[13].

Web Analytics & Tracking

SNEF uses Google Analytics to track the Website and receive statistics of Website users' behaviour such as page open rates and how they choose courses to take. SNEF uses this information to make strategic plans for scheduling courses, focusing efforts areas with higher demand, and marketing or advertising efforts.

Online and Social Media Presence

As mentioned earlier, in addition to the Website, SNEF uses social media such as Facebook[14] and LinkedIn[15] to engage members and share information (they do have an Instagram page, but it is currently set as a private account and its contents are not made available to the public).

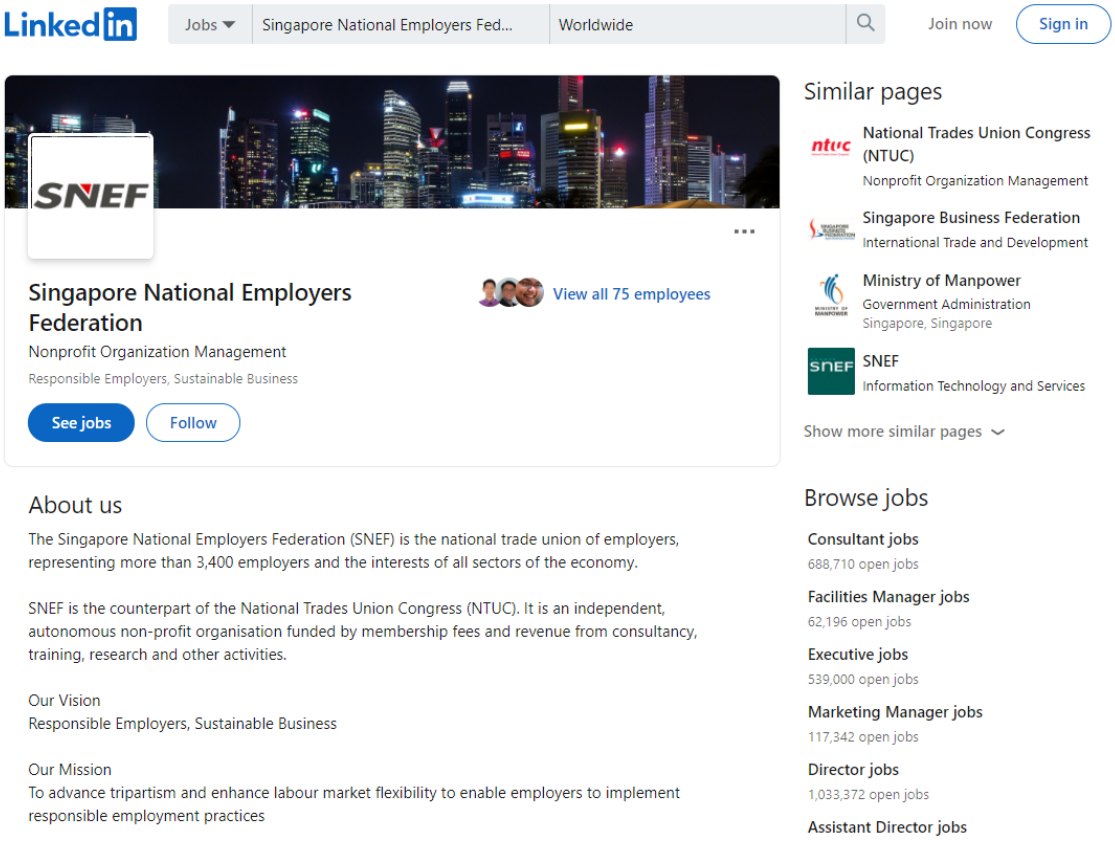


Image 8. SNEF's LinkedIn profile.

[13] https://snef.org.sg/hde/workplace-safety-and-health/
[14] https://www.facebook.com/SingaporeNationalEmployersFederation
[15] https://www.linkedin.com/company/singapore-national-employers-federation

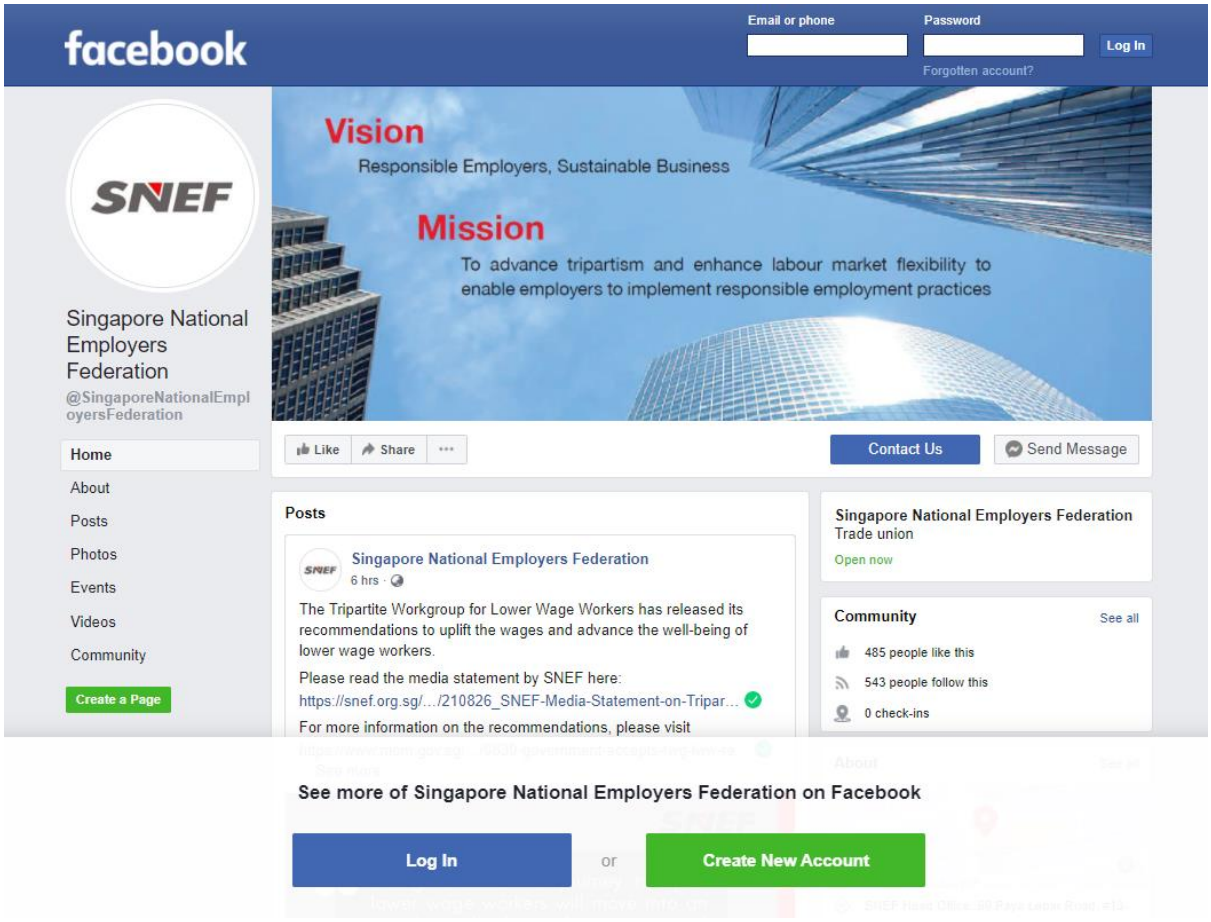


Image 9. SNEF's Facebook profile.

These platforms are regularly updated with posts sharing the latest updates in the employment landscape, SNEF events, and linked resources from news sites and government bodies. Other than allowing for quick sharing of bite-sized information, these platforms also enable the public and/or members to engage and send in a message or question via the messaging functions (e.g. Facebook Messenger).

While SNEF does have an Instagram account and YouTube channel, they are not used for member engagement efforts, information sharing, advertising, or other purposes for now. There are indications that they would like to expand their social media presence by using Instagram and YouTube in the future.

SMSes and other instant messaging apps/channels are not used to complement the Website or social media channels due to data protection and privacy concerns.

Process and Delivery

Process and delivery here refer to efforts of SNEF to digitise their internal work processes, as well as their external processes in relation to member engagement and delivery of services.

a. Internal

SNEF uses a host of software, digital programmes, and applications in their day-to-day operations that cover the following areas:

- Email
- Scheduling in e-Calendars
- Word Processing (Microsoft Office)
- Video Calls (Zoom, Microsoft Teams)
- Company communications (Microsoft Teams)
- Cloud Storage
- Human Resource processes, such as hiring, payroll and performance management
- Finance
- Training Management
- Membership Management
- Sales
- Project Management
- Events Management
- Content Management
- Intranet

SNEF leverages heavily on Microsoft technologies to digitalise their processes. They have also integrated some of their platforms and systems together to create a seamless transition between them, and to reduce duplicity in information input.

b. External

As mentioned above, SNEF uses social media platforms and EDMs to promote their events and services, and to engage members. The Website is the platform that members or the public use to sign up for webinars and workshops.

In addition to cheques, SNEF now also accepts cashless payments such as payments via PayNow and Credit Cards.

Training Provisions

Video platforms such as Zoom are employed to conduct webinars and workshops. As 70% of these sessions are now held online, prior manual procedures are now done digitally. For example, validation of the correct participants is now done by having their full names on their profile before entering the virtual room. Attendance is now recorded through a scanning of a QR code that will take them to a website to fill in participants' details, or a screenshot of the participants' faces on the screen may be taken as proof of attendance. They may also be required to have their cameras on for the whole session.

To facilitate learning, learners' guides and other materials are given to participants in softcopies where possible. Only a few participants, especially those who attend in-person trainings, are still

provided physical hardcopies of notes and guides, because some learners still prefer the tactile feeling or paper to facilitate their learning.

In traditional, in-person teaching sessions, digital tools such as projectors, digital whiteboards and charts are used to engage learners. Wi-Fi is provided at the training room for participants to use their electronic devices to take part in quizzes or access information needed during lessons. With online teaching, different educational platforms are used to make learning more interactive, such as Padlet, Canva, Kahoot, Mentimeter, YouTube.

For continuous improvement, there are online feedback forms done after training sessions for participants to give their suggestions and comments.

Staff Digital Literacy / Proficiency

SNEF employees are described to be ranging between above average to slightly advanced in terms of digital literacy, depending on their job role and department. Most staff are proficient in the following digital skills:

- Communicating online (Microsoft Teams, WhatsApp)
- Word processing (Writing emails, completing forms, amending documents)
- Finding accurate information online

Department-specific or job-specific digital skills that relevant staff have are:

- Accessing and managing content
- Creating content
- Learning digital tools independently
- Synthesising information found online

Upskilling and training staff's digital literacy skills is often conducted on a need basis, when a new software, technology, application, or platform is introduced into their work processes. However, such training is also conducted for staff as part of their professional development in SNEF.

Methodology

A 2-phase approach was conceptualised to assess the participant EBMO's current state of digitalisation in relation to the 5 dimensions defined. In phase 1, an online survey instrument was designed to ascertain EBMO's digitalisation capacity, readiness, and applications. This was followed by an interview with key stakeholders such as C-suite, IT leaders in the organisation, and leaders from relevant departments like Membership, Training, and Engagement.

Survey Design

The survey was designed to assess organizational transformation readiness for digital data-driven change, particularly analyzing the mindsets, practices and resources in order to understand where EBMOs were at in their digitalisation journey and to document how digitalization was taking place in EBMOs and understand the challenges they were experiencing in becoming more digital organizations.

A brief overview of the project was included at the start of the survey, including the estimated amount of time required, consent to participate, agreement to share personal data in accordance

with Singapore's Personal Data Protection Act, as well as information that individual responses will be deidentified and would be destroyed 90 days after closure of the project. This was to reassure participants that responses were confidential and there would be objectivity in reporting of data findings to encourage honesty in responses. Lastly consent was asked for participation in the subsequent interview. Participants had the option to reject participating in the interview without affecting completion of the survey.

Participant's information was then collected for verification of participation at the country level, including information like Job Title, Nature of Work, Organisation Name, Years working in/with EBMOs, and Years working in your current Job Role or a similar field of work. This would support further analysis in future, such as analysing data by the various EBMO areas of work like Membership, Training, and Events.

In the context of the current study, there were insufficient respondents to analyse by areas of work or years of experience, however it would be good to look into such types of analysis in future if there is a larger sample size to see if there are differences between ASEAN EBMOs and other countries' EBMOs or organisation types in future.

Membership engagement

When exploring the first dimension of digitisation, the current state of digitalisation for membership engagement, a comparison of traditional modes of engagement as well as digital modes of engagement was listed as options in the survey.

Traditional modes of membership engagement included:

- Official Communications (i.e. posters, mailers, flyers, SMS, emails, newsletters)
- Informal Communications (i.e. small group gatherings, coffee chats)
- Events (i.e. roadshows, industry fairs, company visits)
- Training and Workshops (i.e. industry topics, short courses, certification)
- Exclusive Member Benefits (i.e. limited access events, cheaper rates)
- Feedback (i.e. satisfaction surveys, industry surveys)

Digital modes of membership engagement included:

- Informal Communications (i.e. instant messaging chat groups)
- Community Content Creation (i.e. making new posts/articles, sharing new information, asking questions, creating polls)
- Community Content Contribution (i.e. like, comment, reply, share, respond)
- Community Participation (i.e. registering for events, workshops, courses)

The latter 3 modes of digital membership engagement leverage on the social or community element of digitalisation that can provide opportunities for members to interact with the EBMO and also with each other in a curated space. This allows for meaningful exchange of information such as articles or discussions, and also allows the EBMO to leverage on this information to gain insights on their members' behaviour and preferences.

While this is typically done on larger social media platforms like Facebook and LinkedIn, it is increasingly common to see organisations use the mobile approach such as setting up WhatsApp, Facebook Messenger, or WeChat business accounts, opening public Telegram groups, and utilising related apps and features like Chatbots, Stories, or interactive elements to streamline and enrich interactions with members.

As data is key to EBMOs in the context of Industry Reports which include collecting, analysing, and publishing industry data, hence an additional question was included to ascertain the state of digitalistion for survey administration specifically, whether the EBMO was still reliant on traditional pen and paper methods or if they had transitioned the digital administration and analysis.

Next, a comparison of Importance vs Frequency of the modes of engagement was listed as options in the survey to identify the modes of engagement that was most critical to the organisation at the current point in time. Areas where scores of Importance and Frequency were not congruent were also explored to identify areas which could be further developed.

Lastly, a prioritization of development timelines indicated the EBMO's readiness to adopt such technologies given the adequate level of support, which provides insights into the potential areas of development for ASEAN EBMOs. Challenges faced in adoption at the organisational and national level were also collected via a free-text field as EBMOs could face uniquely different situations.

Online and social platforms presence

Next, the second dimension of digitisation was explored - the current state of digitalisation for online and social platforms specifically, delving deeper into membership engagement. A comparison of more typical online platforms as well as more modern and emergent platforms was listed as options in the survey.

More typical modes of online presence included:

- Website
- e-Newsletter
- Online Advertisements / Listings (i.e. Google Maps)

More modern modes of online presence included:

- Social Networking (i.e. Facebook, Linkedin)
- Social Media Sharing (i.e. Instagram, YouTube)
- Social Media Interaction (i.e. TikTok, Snapchat)
- Instant Messaging (i.e. Whatsapp, LINE, Viber, Facebook Messenger, Telegram)

Social platforms are increasingly becoming more important especially due to its accessibility and outreach to the masses, especially in countries where mobile phone ownership exceeds personal computer or laptop ownership. This allows businesses to leverage on existing technologies rather than purchase or develop technological capabilities from scratch, saving time and manpower costs.

Next, a comparison of Importance vs Frequency of the online and social platforms used was listed as options in the survey to identify the platforms that were most critical to the organisation at the current point in time. Areas where scores of Importance and Frequency were not congruent were also explored to identify areas which could be further developed.

Lastly, a prioritization of development timelines indicated the EBMO's readiness to adopt such technologies given the adequate level of support, which provides insights into the key areas of development for ASEAN EBMOs. Challenges faced in adoption at the organisational and national level were also collected via a free-text field as EBMOs could face uniquely different situations.

Process and delivery (internal and external)

Next, the third dimension of digitalisation in the survey explored the digitisation and digitalisation of both internal and external processes and systems used to deliver EBMO services. A comparison of more typical digital tools as well as more modern and emergent tools were listed as options in the survey.

More typical modes of digital tools included:

- Email
- Scheduling / Calendar
- Word Processing (i.e. Microsoft Office, Word, PowerPoint, Excel)

More modern modes of digital tools included:

- Video Calls (i.e. Zoom, Google Meets, Microsoft Teams, Cisco Webex)
- Company Communications (i.e. Skype, Whatsapp, LINE, Viber, WeChat, Telegram)
- Cloud Storage (i.e. Google Drive, OneDrive, Dropbox)
- Human Resource (i.e. Hiring, Payroll, Performance Management)
- Finance (i.e. Billing, Accounting, Projections)
- Productivity / Tasks Management (i.e. Jira, Asana, Trello, Toggl, Monday)
- Membership Management (i.e. Member Benefits, Renewals, Email Automation)
- Events Management (i.e. Registration Management, Webinar Tools, Surveys)
- Content Management (i.e. WordPress, Wix, Shopify, Drupal)
- Intranet (i.e. GreenOrbit, Lumapps, Simpplr, Microsoft Sharepoint)

With the emergent Covid situation, some digital tools like Video Calls have become transitioned from being a modern tool to becoming an essential tool. Similarly, analog or pen-and-paper formats are increasingly becoming obsolete, such as with the acceptance of digital signing or digital tokens for verifying identity. This does not make the traditional digital tools like email, scheduling, or word processing obsolete, but rather creates a need for them to be integrated seamlessly with new technologies to increase its capabilities and ease of use.

As the type of hardware used will affect the types of software that can be accessed, a question was also included to verify the type and percentage of digital device ownership in the EBMO covering Mobile Phones, Personal Computers, and Laptops.

An additional question was also included to verify the level of technology awareness and adoption of the EBMOs in relation to recent tech trends covering:

1. Process Automation
2. Artificial Intelligence
3. Chatbots
4. Machine Learning
5. Big Data
6. Data Analytics

7. Data Visualisation
8. Internet of Things
9. Industry 4.0 / Smart Industry
10. Robotics

Next, a comparison of Importance vs Frequency of the online and digital workplace tools used was listed as options in the survey to identify the tools that were most critical to the organisation at the current point in time. Areas where scores of Importance and Frequency were not congruent were also explored to identify areas which could be further developed.

Lastly, a prioritization of development timelines indicated the EBMO's readiness to adopt such technologies given the adequate level of support, which provides insights into the key areas of development for ASEAN EBMOs. Challenges faced in adoption at the organisational and national level were also collected via a free-text field as EBMOs could face uniquely different situations.

Training provision

Next, the 4th dimension of digitalisation in the survey explored the digitalisation of training systems in EBMOs. This included the mode of training delivery (i.e. Traditional, Digital, and Hybrid) as well as a comparison of the training provision tools used.

More typical training tools included:

- Manual (i.e. pen and paper records, paper forms and printouts, hardcopy attendance sheets)
- Training delivery software (i.e. PowerPoint, YouTube)
- Training activities (i.e. polls, quizzes, games)
- Post-training Feedback and Improvement

More modern modes of digital tools included:

- Learning Management System (LMS)
- Content Authoring System (i.e. Full SCORM Courseware, Workshops, Microlearning)

As day-to-day interactions increasingly become virtual, EBMOs need to be agile in reacting to the global situation and adapt their modes of training accordingly. This is especially important to EMBOs who place emphasis on training and workshops as the it may still take some time before face-to-face interactions, especially in large groups, is deemed to be safe once more.

Next, a comparison of Importance vs Frequency of training tools used was listed as options in the survey to identify the tools that were most critical to the organisation at the current point in time. Areas where scores of Importance and Frequency were not congruent were also explored to identify areas which could be further developed.

Lastly, a prioritization of development timelines indicated the EBMO's readiness to adopt such technologies given the adequate level of support, which provides insights into the key areas of development for ASEAN EBMOs. Challenges faced in adoption at the organisational and national level were also collected via a free-text field as EBMOs could face uniquely different situations.

Staff digital literacy/proficiency

To close off, the 5th dimension in the survey explored staff digital literacy and proficiency in EBMOs. This ranged from assessing a variety of basic to complex digital skills, to assessing the organisation's views on digitalisation.

The views on digitalisation covered 3 broad aspects – Digital leadership, Digital technologies, and Value generated from digitalisation. This gives an insight on the level of digital maturity of the organisation, and reflects the mindsets and readiness for digitalisation as without digital leadership, it would be difficult for the organisation to adopt technologies effectively and generate value from the technology adopted.

Lastly, challenges faced in enhancing digital literacy at the workplace, and challenges or initiatives faced at the national level were also collected via a free-text field as EBMOs and different ASEAN countries could face uniquely different situations.

Survey Administration

The Surveys and Interviews were scheduled to be conducted over a 5-week period, with Surveys being conducted in the first 2 weeks, followed by Interviews in the subsequent 3 weeks starting from September as below.

	Week 1 (6-10 Sep)	Week 2 (13-17 Sep)	Week 3 (20-24 Sep)	Week 4 (27 Sep – 1 Oct)	Week 5 (4 – 8 Oct)
Online Surveys	X	X			
Interviews			X	X	X

Table 1. Proposed timeline of completion for Surveys and Interviews.

To provide a robust analysis for ILO, the targeted completion rate was 15 or more Survey responses per EMBO, targeting individuals in the organisation from the following job roles:

- C-suite / Top Management (i.e. CEO, COO, CFO)
- IT Management (i.e. CTO, IT Manager)
- Operations Management
- Membership Management
- Training Management
- Events Management
- Social Media Management

The survey was administered via a closed email invite to key contact persons from each EBMO who were to then distribute it to the relevant staff in their organisation. Both the digital and traditional formats was used, with Google Forms being the survey administration platform of choice. A printable copy of the survey response form was also generated in pdf format and attached in the invitation email, however no respondents used the pen-and-paper format to respond to the survey.

Interview Design

The interviews were designed to further explore on survey topics in the context of the EBMO's current situation with more open-ended questions to facilitate sharing of examples and EBMO-specific responses. A representative from top management as well as staff members in charge of IT, training, membership, and related services / work functions were invited to participate.

The key EBMO personnel responsible for digital work process was also invited, however it was understood from preliminary discussions that not all EBMOs had a specific individual helming such a role as it could fall under the umbrella of a more generic role such as Administration or even be a job requirement for many roles. For instance, executives would need to be familiar with company software in relation to their areas of work such as training registration and scheduling software for Training Executives, or customer relationship management software for marketing, sales, and membership related job roles.

Interview Administration

1 Interview session (1-2 hours) was scheduled per EMBO with Top Management (i.e. CEO, Managing Director, President) and IT or Operations, via a calendar scheduling app link. The number of interview participants was proposed to be limited to 3 pax maximum for time management purposes.

A Zoom link was generated upon confirmation of the interview slot, and reminders were sent 3 days and 1 day before the scheduled interview slot respectively. A Google Calendar invite was also sent with the Zoom link attached to facilitate participants' scheduling.

The interview guide was sent to participants before the interview session for participants' pre-reading and preparation as different countries in ASEAN had different official languages hence translation efforts would potentially be needed to prepare beforehand. The language used to conduct the interviews was English, and there were no difficulties conversing in English.

Findings

Overview of Survey

A total of 26 complete survey responses were submitted, and 12 pax participated in interviews representing 5 ASEAN EBMOs. Participation rates were lower than expected, with the breakdown of response rates as below.

EBMO	**Survey (# pax)**	**Interview (# pax)**
CAMFEBA	Complete (3)	Complete (3)
MEF	Complete (3)	Complete (3)
ECOP	Complete (7)	Complete (4)
VCCI	Complete (4)	Complete (1)
SNEF	Complete (4)	Complete (1)
ECOT	Complete (1)	Unscheduled (0)
LNCCI	Complete (3)	Unscheduled (0)
APINDO	Complete (1)	Unscheduled (0)

UMFCCI	No response (0)	No response (0)

*Table 2. C*ompletion rates for Surveys and Interviews at end of administration period.

Only CAMFEBA, MEF, ECOP, VCCI, and SNEF had full completion, while ECOT, LNCCI, and APINDO had partial completion and there was a lack of representation from UMFCCI. At the same time, completion numbers were lower than the initial request of 15 pax responses per EBMO, with some EBMOs only having 1 respondent. Hence findings may not be representative of the country as a whole and should be taken as a snapshot of the EBMO.

Findings by Dimension (across ASEAN)

Across the 5 dimensions of digitalisation, Staff digital literacy / proficiency was rated to have the highest importance (67.7%), followed by Member engagement (61.1%). Online and social platform presence had the lowest importance score (44%) and was the only dimension that rated less than 50%, indicating that overall across the representative ASEAN EBMOs this was not an area of priority.

For all the dimensions except Staff digital literacy / proficiency, Importance scores ranked higher than Frequency scores, indicating that these are areas that can be potentially further developed. The largest score gap was for Training Provision (4.3%) which highlights the need to digitalise training processes such as administration, management, and delivery.

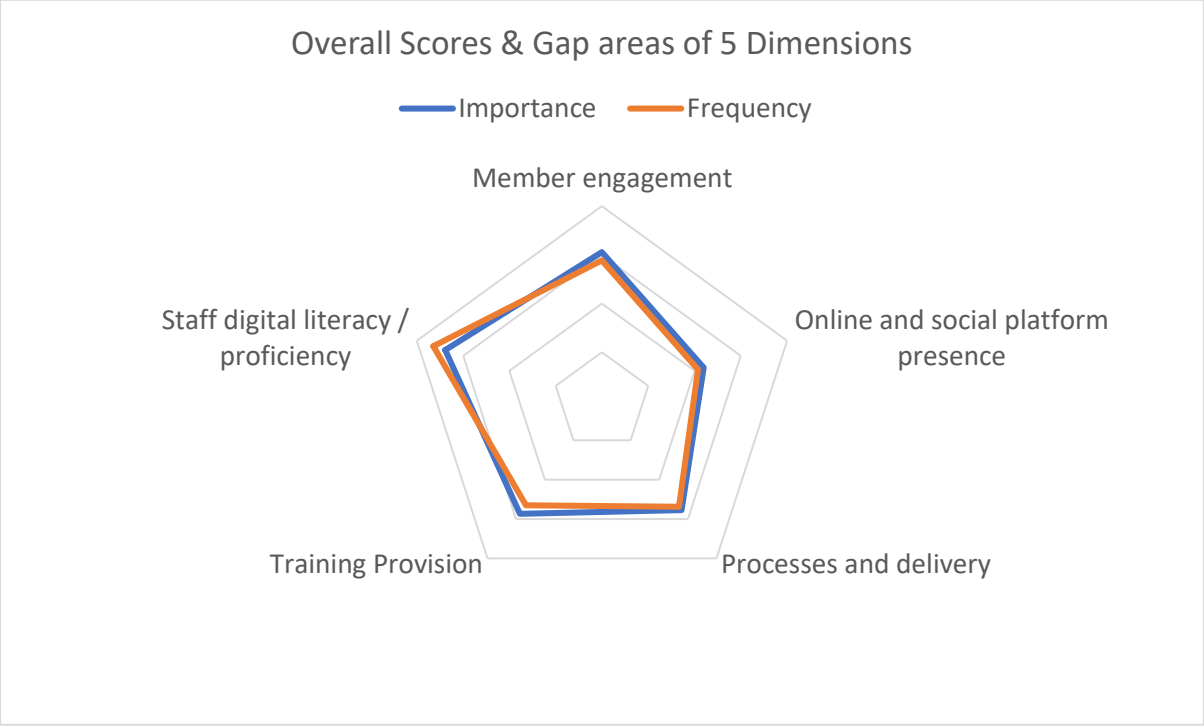


Diagram 1. Importance and Frequency of the 5 Dimensions across ASEAN EBMOS.

Member engagement

There is a focus on more traditional modes of membership engagement, such as Training and workshops, Official communications, and Feedback. However it is encouraging to see Community Participation ranking third (88.5%) which shows that more emphasis is placed on two-way communications and active participation.

EBMOs can consider developing Exclusive Member Benefits, Community Content Creation and Contribution, and Informal Communications. These are also the modes of engagement that potentially require more digital know-how, especially if the EBMO intends to leverage on Social Media to build their community outreach arm.

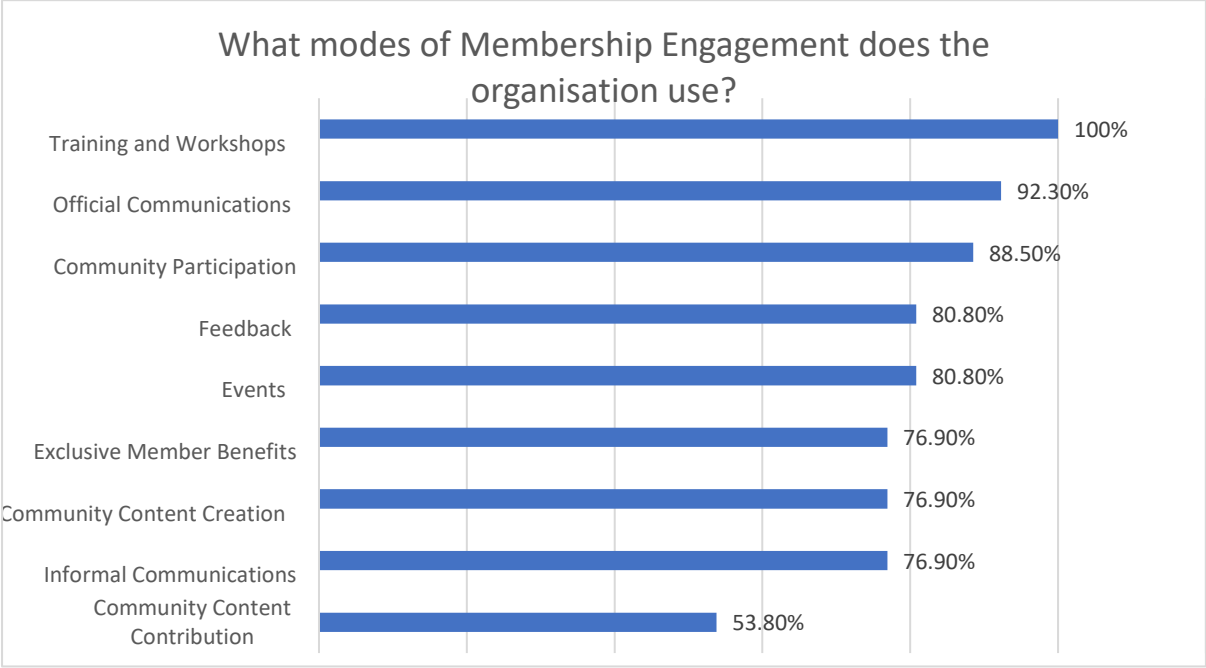


Diagram 2. Usage rates of modes of Membership Engagement across ASEAN.

It is encouraging to see that there is a transition to the online mode of survey administration, however there is still heavy reliance on emails. This can potentially be automated or have programmed responses to reduce reliance on manual updates and follow up, freeing up resources and utilising digital solutions.

While the usage of free platforms reduces overhead costs and increases digital capabilities, it would also be limited in the range of features, analytics, and reporting which could impact the level of insights that can be derived from the data. Further sections will explore alternatives as well as solutions such as exploring funding opportunities from the government, NGOs, associations, or other communities.

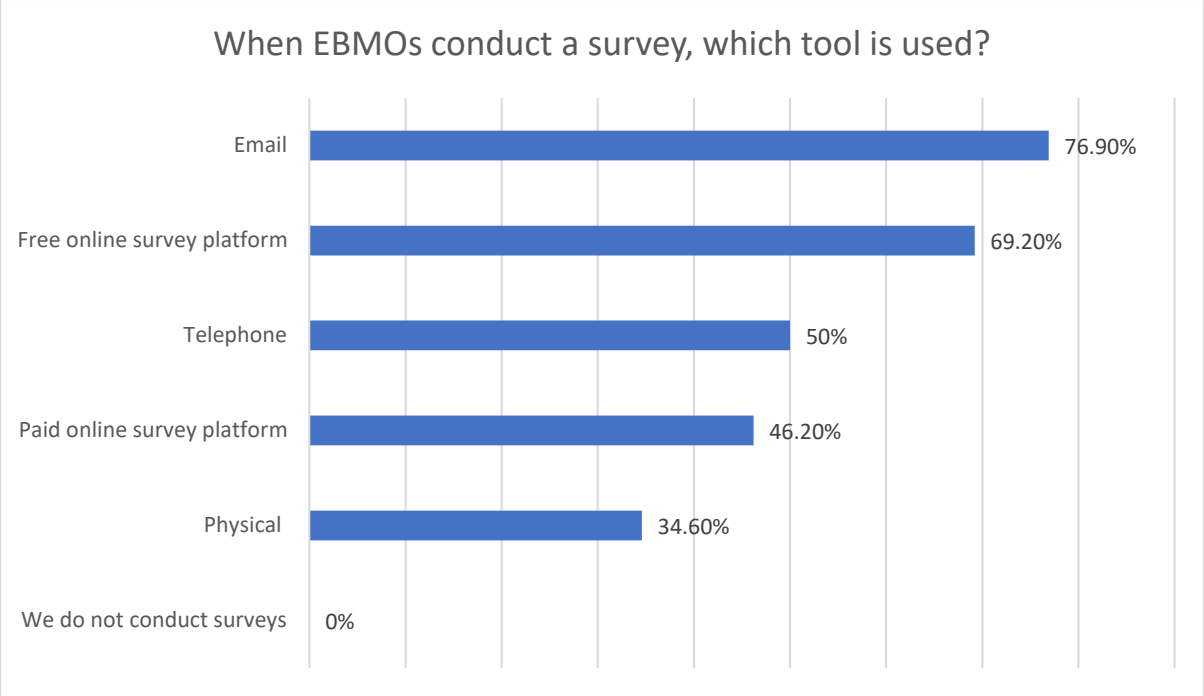
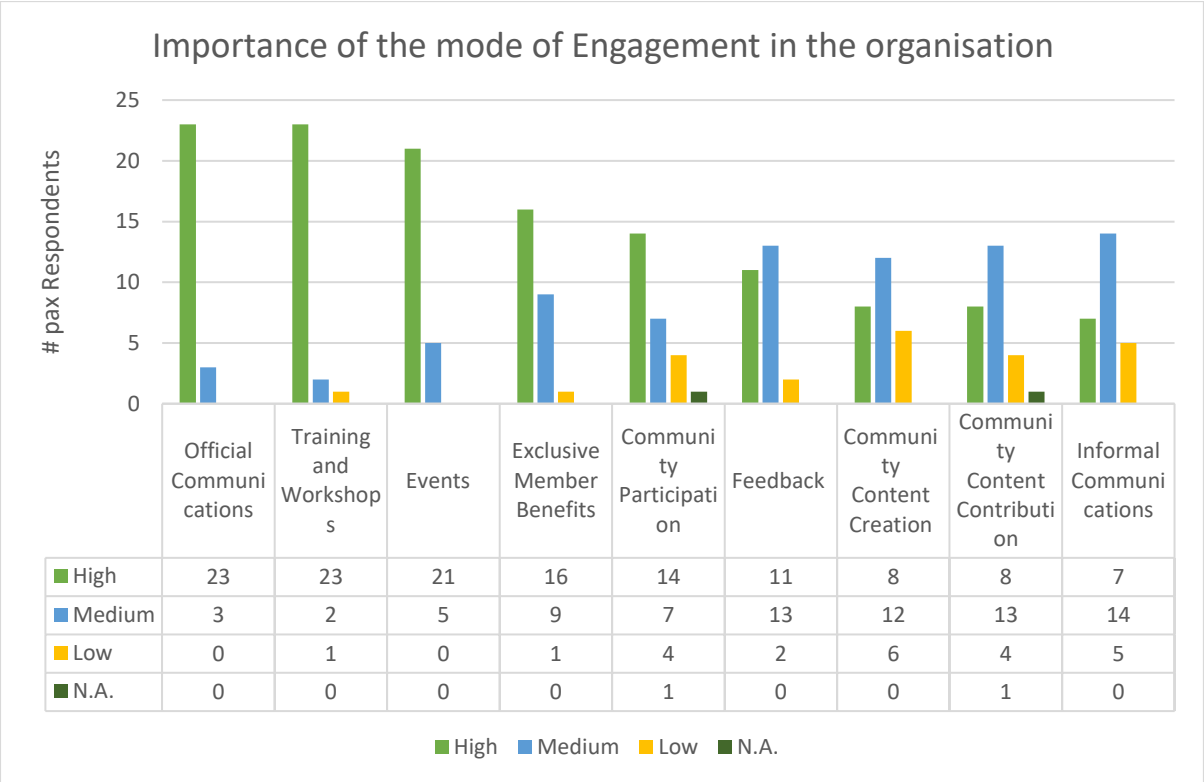


Diagram 3. Usage rates of Survey tools across ASEAN EBMOS.

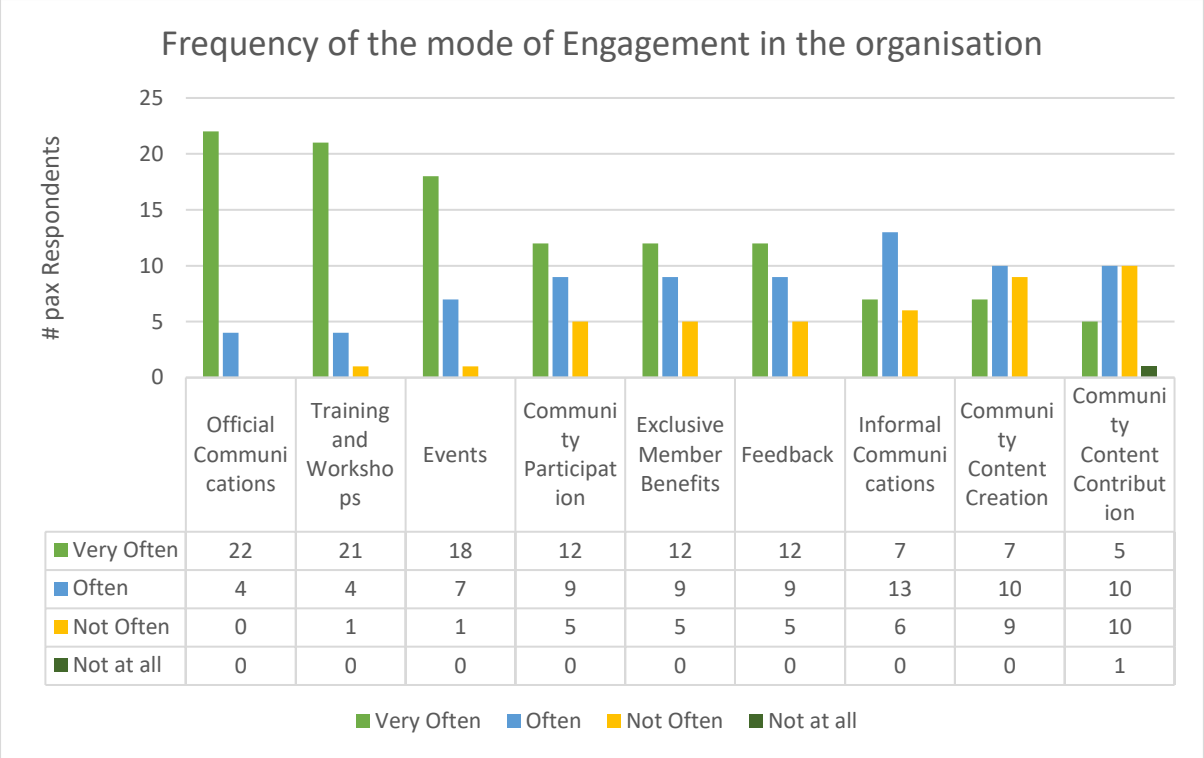
Findings reflect that the more traditional methods of engagement are of higher importance, potentially because they were developed over a longer period of time and hence have gained traction. However it is also encouraging to see a positive response rate for the community and social modes of engagement which shows that EBMOs in ASEAN recognise the importance of these newer digital modes of engagement.



	Official Communications	Training and Workshops	Events	Exclusive Member Benefits	Community Participation	Feedback	Community Content Creation	Community Content Contribution	Informal Communications
High	23	23	21	16	14	11	8	8	7
Medium	3	2	5	9	7	13	12	13	14
Low	0	1	0	1	4	2	6	4	5
N.A.	0	0	0	0	1	0	0	1	0

Diagram 4. Importance of the mode of Engagement across ASEAN EBMOS.

It is encouraging to see that Community Participation is more frequently used, however there is low frequency of usage for community content creation and contribution. It should be noted that one respondent indicated “Not at all” for Community Content Contribution, which could indicate an untapped membership engagement avenue for the EBMO.



	Official Communications	Training and Workshops	Events	Community Participation	Exclusive Member Benefits	Feedback	Informal Communications	Community Content Creation	Community Content Contribution
Very Often	22	21	18	12	12	12	7	7	5
Often	4	4	7	9	9	9	13	10	10
Not Often	0	1	1	5	5	5	6	9	10
Not at all	0	0	0	0	0	0	0	0	1

Diagram 5. Frequency of the mode of Engagement across ASEAN EBMOS.

Hence when the Importance and Frequency is compared for Membership Engagement, potential areas for development emerge as follows:

1. Community Content Contribution
2. Exclusive Member Benefits
3. Community Content Creation
4. Events

In the Covid environment now, engaging members are increasingly important to retain membership numbers and maintain organisational sustainability. Hence it is important for EBMOs to develop digital modes of membership engagement such as by using Social Media Communities and Content, which can extend to online Events for two-way interaction between the EBMO and members or potential members. Developing Exclusive Member Benefits via digital platforms would also allow for wider reach to potential members as well as data tracking and analysis which can be used to personalise marketing efforts in future as well, further increasing engagement.

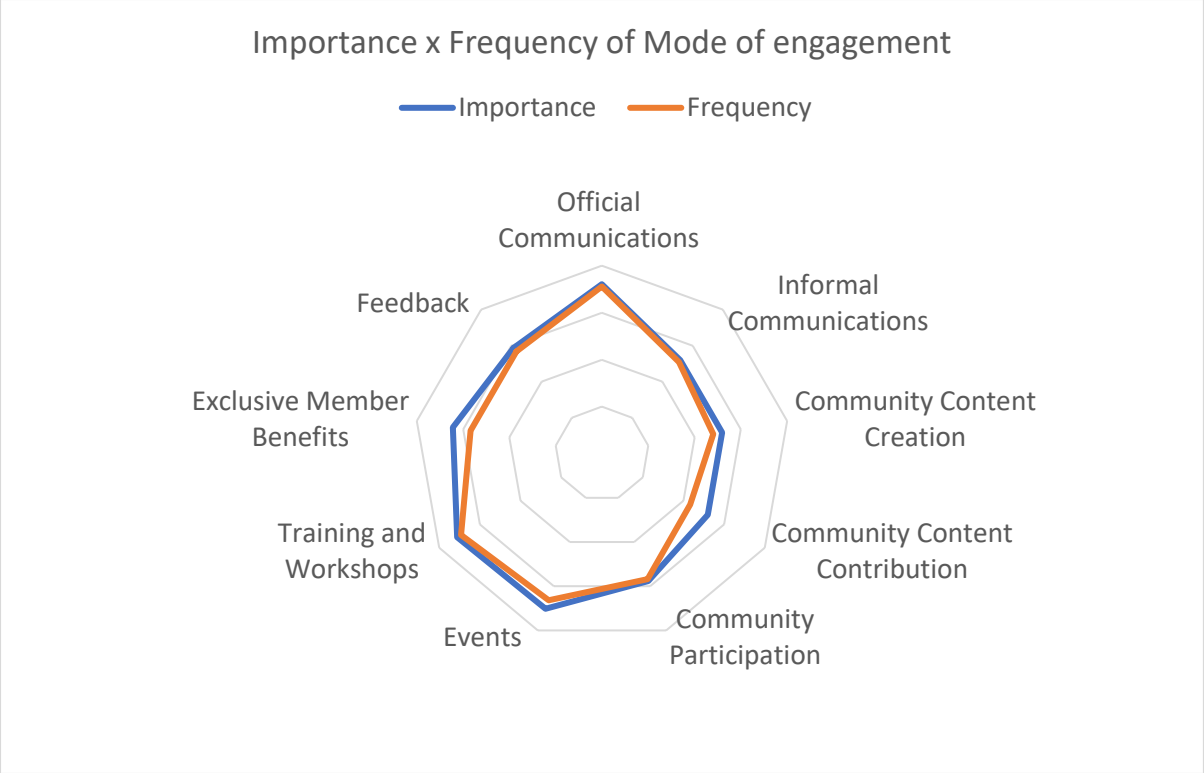
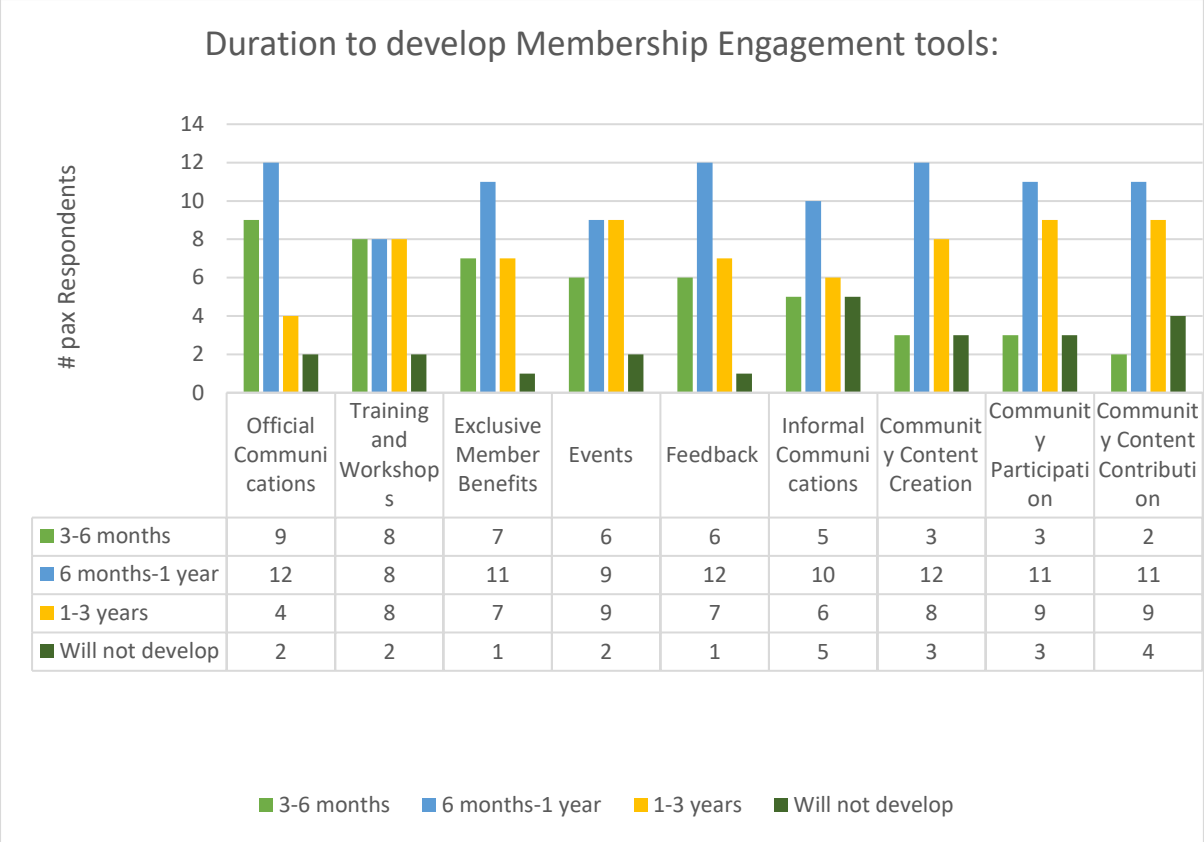


Diagram 6. Importance and Frequency of the mode of Engagement across ASEAN EBMOS.

The traditional means of engagement ranked higher in terms of development urgency, largely ranking in 3-6 months while the modern approaches to membership engagement largely ranked 6 months or longer.

This could be due to existing policies, processes, and systems that have previously been designed for the traditional approach and is easier to operationalise for the EBMO. However, it is encouraging to see that EBMOs intend to develop Community modes of engagement in the mid to long term (i.e. within 3 years), and subsequent conversations also reveal that EBMOs are planning to digitalise and potentially automate traditional modes of engagement such as by using hybrid training models, utilising software for collection and analysis of feedback data (i.e. Qualtrics), and creating official online identities such as by reviewing and updating their websites or creating an official Facebook or Linkedin business account.



	Official Communications	Training and Workshops	Exclusive Member Benefits	Events	Feedback	Informal Communications	Community Content Creation	Community Participation	Community Content Contribution
3-6 months	9	8	7	6	6	5	3	3	2
6 months-1 year	12	8	11	9	12	10	12	11	11
1-3 years	4	8	7	9	7	6	8	9	9
Will not develop	2	2	1	2	1	5	3	3	4

Diagram 7. Duration to develop the mode of Membership Engagement tools across ASEAN EBMOS.

Online and social platforms presence

It is encouraging to see Social Networking scoring high, but the traditional modes of digital presence like Websites and e-Newsletters also ranked very highly too. This could indicate potential to develop or automate existing processes to streamline management. For example, digitalising e-newsletters can include using automated marketing software (i.e. MailChimp) for deeper tracking, automated engagement responses, and insights & reports generation as compared to the traditional format which may be more manual and harder to personalise responses and generate insights over time.

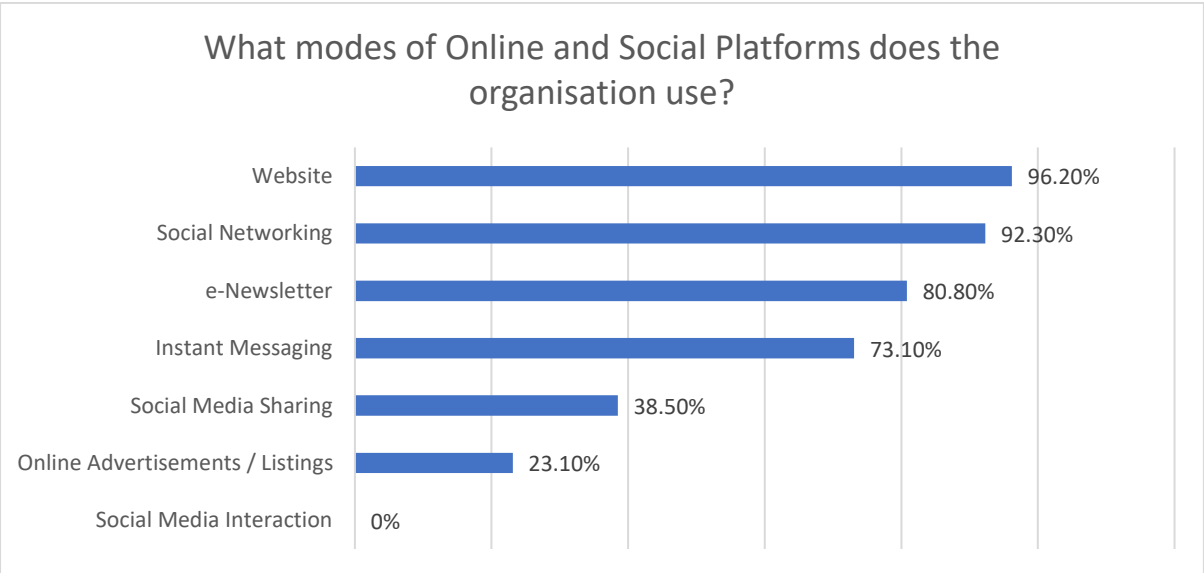


Diagram 8. Usage rates of modes of Online and Social Platforms across ASEAN EBMOS.

It is encouraging that online advertisements and listings are identified to be of lower importance as these are less effective ways of developing an online presence despite the low barriers to entry. However it is less encouraging to see social media sharing and interaction being identified to be of low importance or deemed as not relevant as well because these are among the lowest cost ways to engage an audience and build an online presence with the widest outreach and range of applications. The challenge could be in developing the in-house capabilities to create and maintain the social platform as it requires regular content creation and interaction, which is explored more in the interviews.

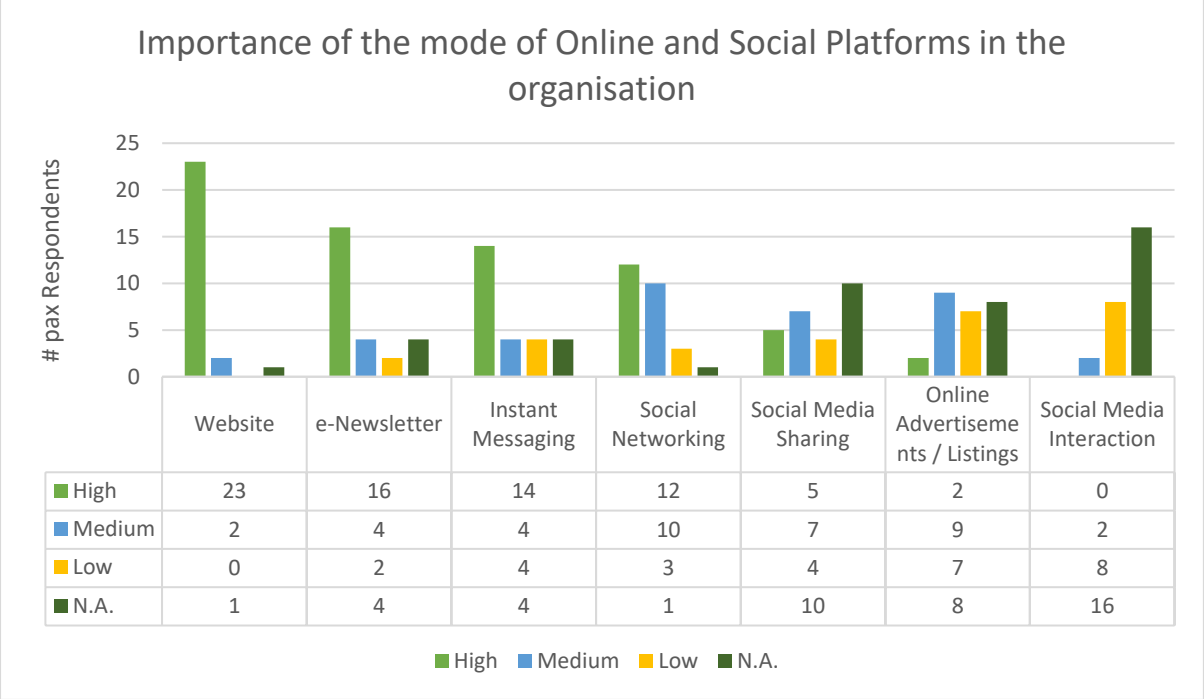


Diagram 9. Importance of the mode of Online and Social Platforms across ASEAN EBMOS.

Findings for frequency of usage reflected similar to scores for importance with even more pronounced negative scores for social media. This could be due to the lack of having developed an online Social Media presence to start with, or perhaps the EBMO has no immediate plans to develop social media capabilities, hence participants viewed it as being low probability or not applicable entirely.

Some deterrents to using social media platforms were explored in the subsequent interviews, which included the inability to control the public's response, difficulty managing negative public feedback or lashbacks, and the amount of resources needed to constantly develop and publish engaging content.

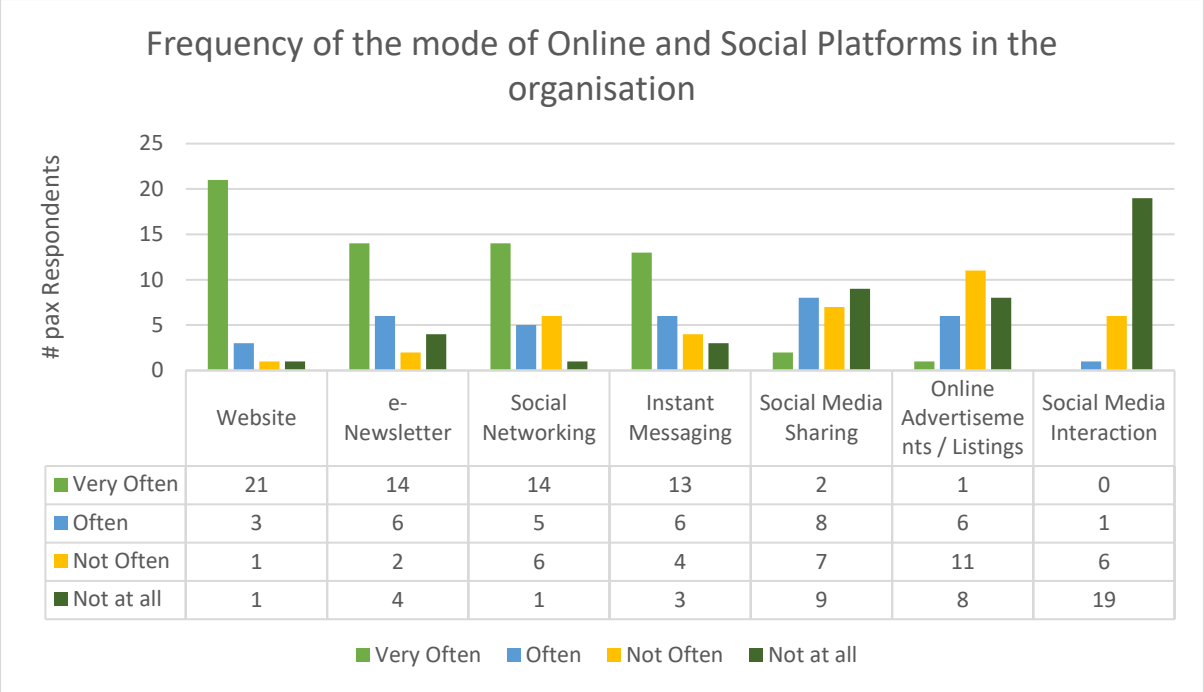


Diagram 10. Frequency of the mode of Online and Social Platforms across ASEAN EBMOS.

When Importance and Frequency is compared for Online and Social Platforms usage, potential areas for development emerge as follows:

1. Online Advertisements / Listings
2. Social Media Interaction
3. Social Media Sharing

As the future direction is moving towards digitalisation, hence online advertisements / listings should utilise AI or big data to derive insights for the organisation if it is to be further developed. Similarly for social media interaction and sharing, more meaningful utilisation of the platform's capabilities to derive insights and analytics should be the goal to make the time and effort invested in worthwhile.

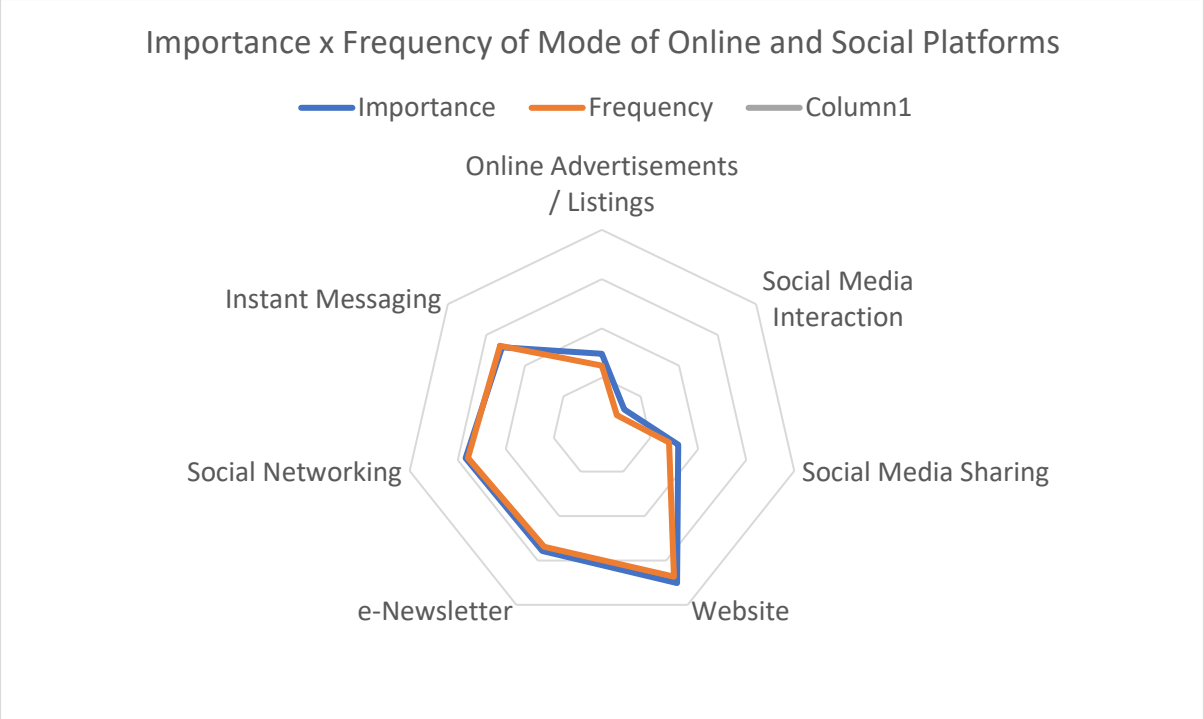
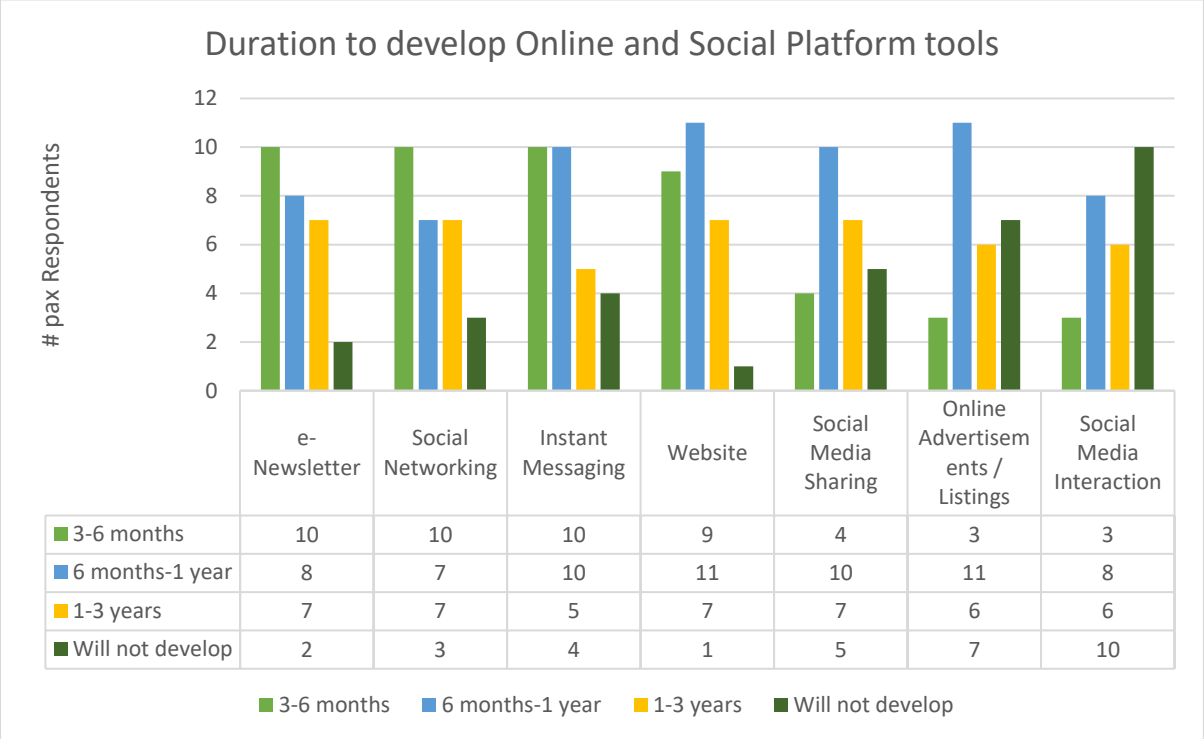


Diagram 11. Importance and Frequency of the mode of Online and Social Platforms across ASEAN EBMOS.

Similar to the previous section, the traditional modes of digital presence like Websites and e-Newsletters ranked higher in terms of development urgency, largely ranking in 3-6 months, while other Online and Social Platforms largely ranked 6 months or longer, which could be attributed to similar challenges faced.



	e-Newsletter	Social Networking	Instant Messaging	Website	Social Media Sharing	Online Advertisements / Listings	Social Media Interaction
3-6 months	10	10	10	9	4	3	3
6 months-1 year	8	7	10	11	10	11	8
1-3 years	7	7	5	7	7	6	6
Will not develop	2	3	4	1	5	7	10

Diagram 12. Duration to develop Online and Social Platform tools across ASEAN EBMOS.

Process and delivery (internal and external)

EBMOs across ASEAN ranked 100% on potentially essential digital processes/systems such as Cloud Storage, Video Calls, and Email followed by Word Processing and Scheduling/Calendar being ranked second at 96.2% across ASEAN EBMOs. It is also encouraging to see the utilisation of digital processes/systems such as Finance, Membership Management and Events Management scoring high (<84%); however, the usage of digital processes/systems like Productivity/Tasks Management, Content Management, and Intranet is still deemed as unpopular across ASEAN EBMOs.

This could potentially be due to high setup and maintenance costs, or because the system is not viewed as essential to the day-to-day operations of the EBMO. For instance, if an EBMO is already resource constrained, they may not view adoption of a HR or Productivity Management digital platform as important citing reasons like staff don't have time to use the system, staff don't have time to attend related courses/training or that staff will face technology fatigue if too many systems are introduced.

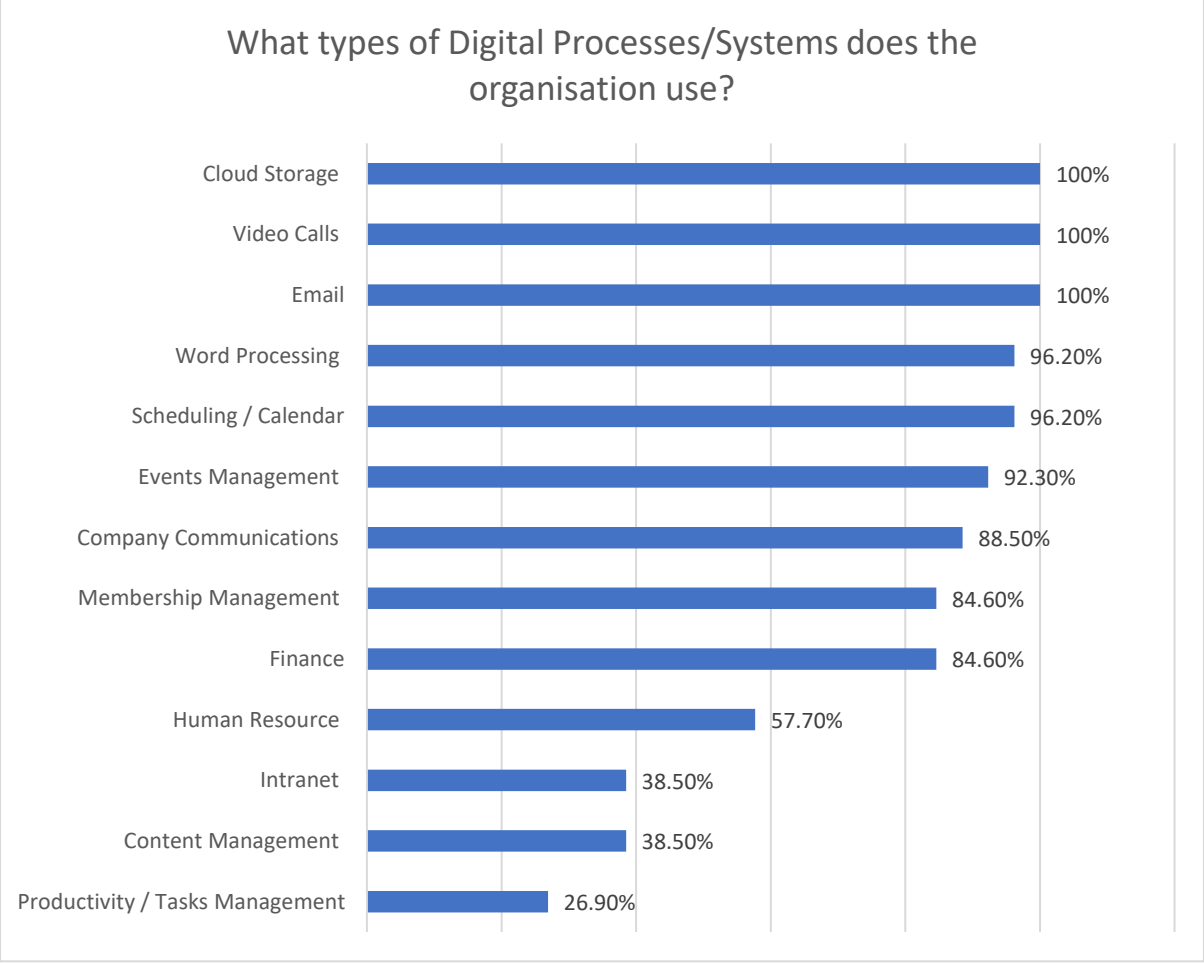
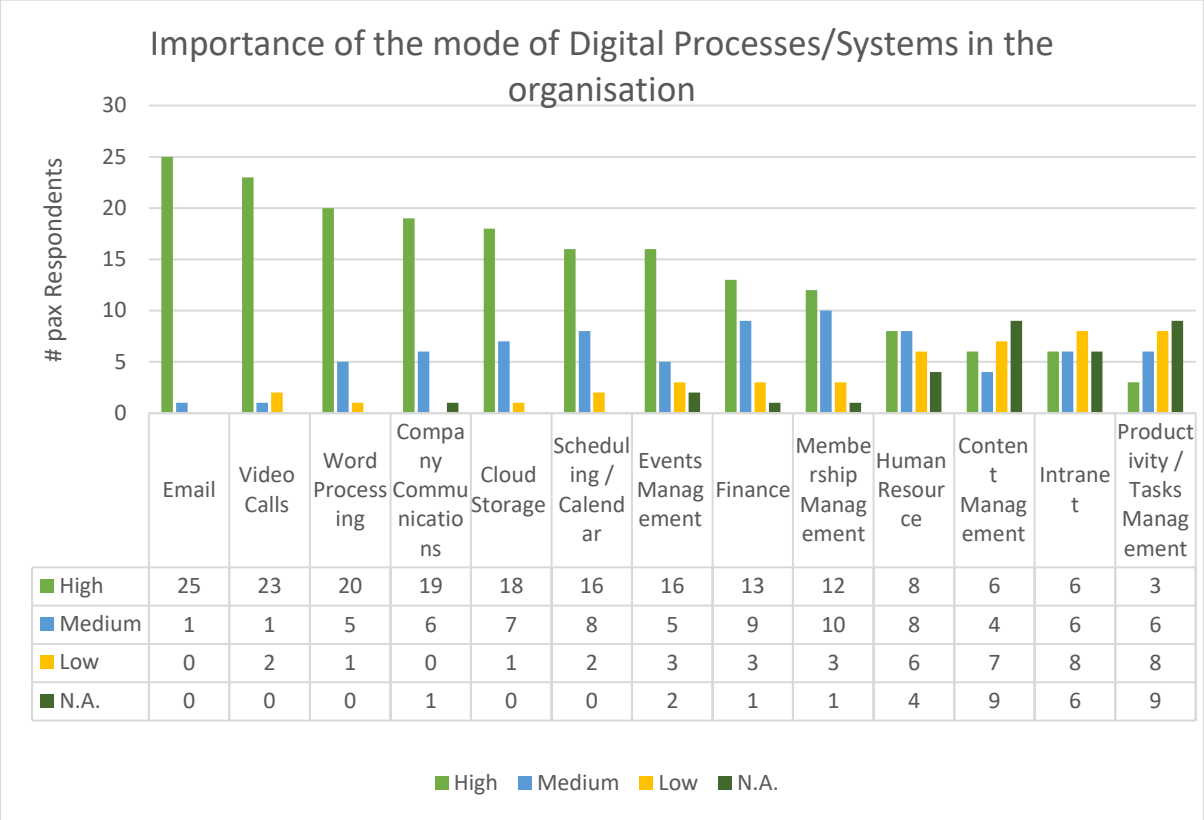


Diagram 13. Types of Digital Processes/Systems used across ASEAN EBMOS.

The more traditional digital processes/systems are of higher importance overall with the addition of video calls and cloud storage ranking highly due to the global shift towards the virtual work

environment. However there is a degree of positive perceptions of importance for digitalising Events Management, Finance, and Membership Management. This could improve organisational process workflows for EBMOs, as digitalisation can contain an element of automation which would help to free up organisational resources once implemented, allowing the EBMO to focus on higher-value areas of work.



	Email	Video Calls	Word Processing	Company Communications	Cloud Storage	Scheduling / Calendar	Events Management	Finance	Membership Management	Human Resource	Content Management	Intranet	Productivity / Tasks Management
High	25	23	20	19	18	16	16	13	12	8	6	6	3
Medium	1	1	5	6	7	8	5	9	10	8	4	6	6
Low	0	2	1	0	1	2	3	3	3	6	7	8	8
N.A.	0	0	0	1	0	0	2	1	1	4	9	6	9

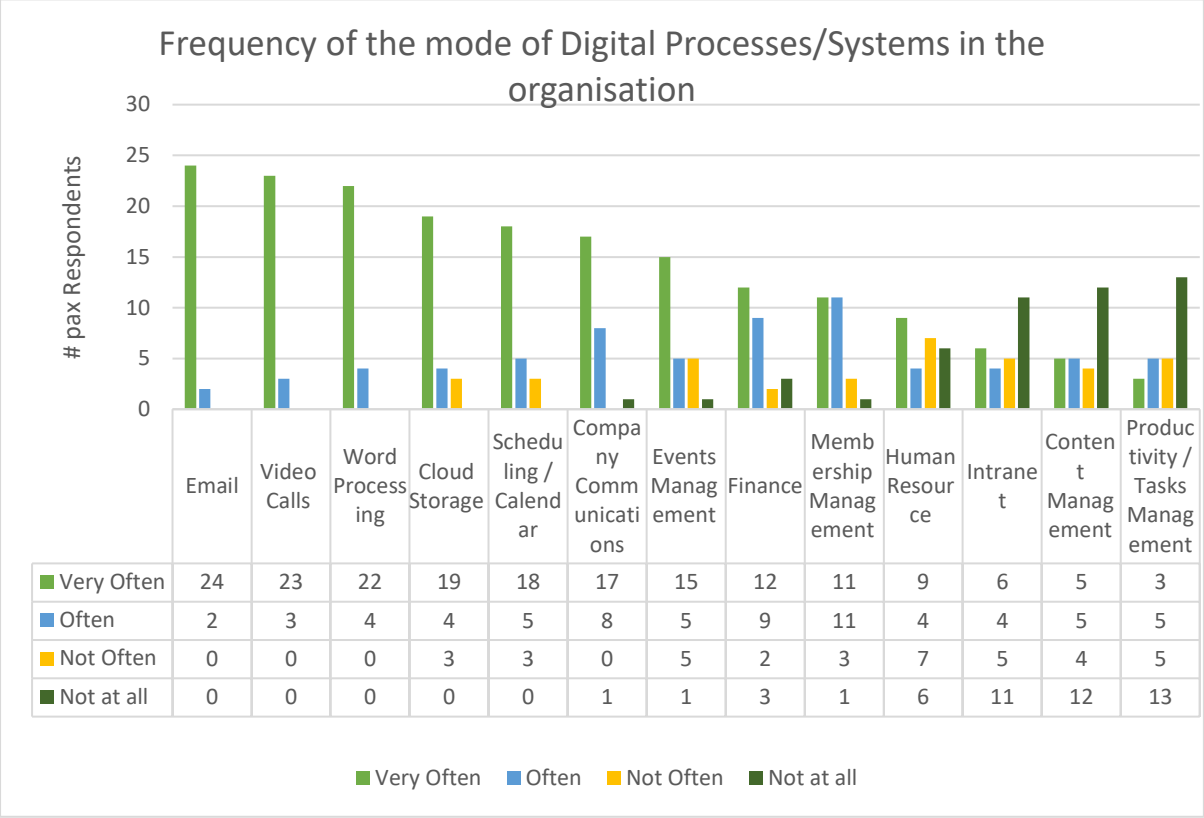
Diagram 14. Importance of the mode of Digital Processes/Systems across ASEAN EBMOS.

Findings on frequency of usage were similar to the above in addition to more pronounced negative scores for Intranet, Content Management, and Productivity/Tasks Management. Intranet capabilities are generally only required for more sensitive industry sectors or very large organisations which have robust internal capabilities, hence it is understandable if Intranet capabilities have not been developed and are not a priority right now for EBMOs.

However, Content Management is essential for building an online presence as it can range from website management to publishing content across multiple platforms (i.e. articles posted on website will also be published on Facebook; photos or videos shared on Instagram will also be simultaneously published on other linked platforms). Content Management also can automatically optimize content for search engines without users needing technical knowledge, and provide in-built security features that would otherwise be expensive to develop for the EBMO. Small regular steps like weekly posting short articles or infographics with hashtags for example, is a simple way to leverage on this capability at minimal cost.

Productivity and Tasks management is also another system that can be utilised to enhance organisational capabilities by improving time management and tracking tasks progress, which can be

used to facilitate communications and deployment of manpower, especially in this Covid environment where staff have to work remotely or for larger EBMOs where there may be geographical differences between branches or offices.



	Email	Video Calls	Word Processing	Cloud Storage	Scheduling / Calendar	Company Communications	Events Management	Finance	Membership Management	Human Resource	Intranet	Content Management	Productivity / Tasks Management
Very Often	24	23	22	19	18	17	15	12	11	9	6	5	3
Often	2	3	4	4	5	8	5	9	11	4	4	5	5
Not Often	0	0	0	3	3	0	5	2	3	7	5	4	5
Not at all	0	0	0	0	0	1	1	3	1	6	11	12	13

Diagram 15. Frequency of the mode of Digital Processes/Systems across ASEAN EBMOS.

When Importance and Frequency is compared for Digital Process / System usage, potential areas for development emerge as follows:

1. Intranet
2. Productivity / Tasks Management
3. Human Resource
4. Finance
5. Content Management

However, with the exception of Human Resource and Finance, initial scores are low indicating that these are not areas of critical concern for EBMOs currently. However Content Management and Productivity and Tasks Management can be considered for further development moving forwards to further enhance ASEAN EBMO's digital capabilities and organisational growth.

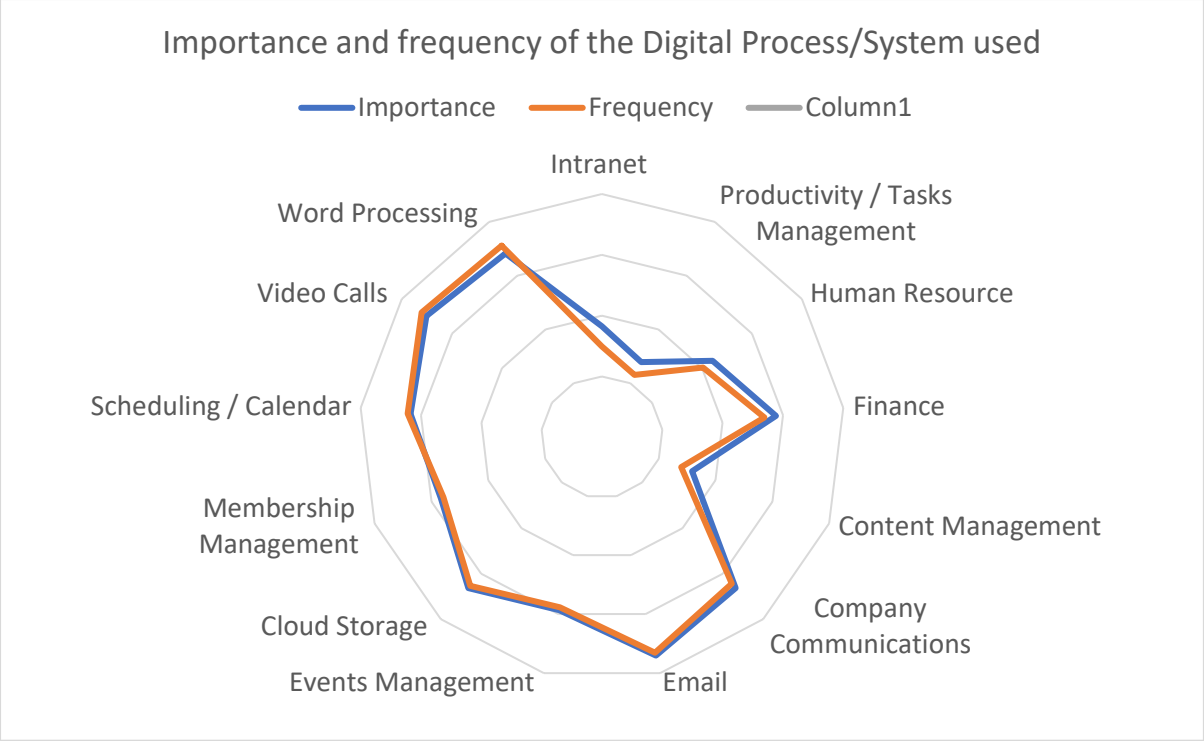


Diagram 16. Importance and Frequency of the Digital Process/System used across ASEAN EBMOS.

When looking at the duration to develop digital processes and systems in the organisation, traditional digital processes/systems are ranked higher in terms of development urgency, ranking in 3-6 months while other digital processes/systems largely ranked longer than 6 months or are not planning to be developed at all. The exception to this is Cloud Storage, which is fairly new yet high on the priority list for development. This could potentially be attributed to the demands from remote working due to covid, as well as potential lockdowns limiting staff access to office which can greatly disrupt organisational operations. Hence there is urgency to develop this organisational capability in order to be able to respond to the changing global situation.

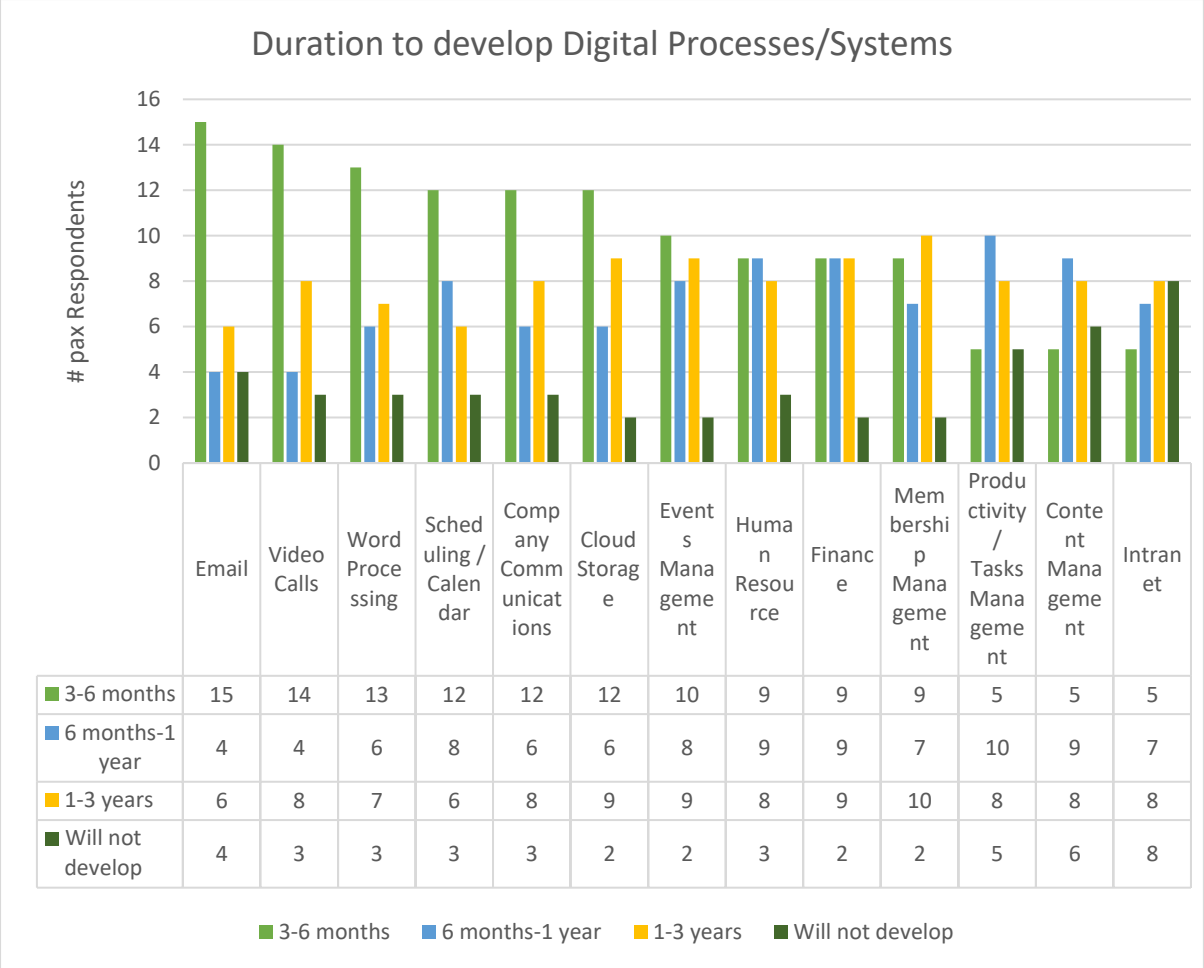


Diagram 17. Duration to develop Digital Processes/Systems across ASEAN EBMOS.

Lastly, the usage rates of digital device ownership across ASEAN EBMOs ranked highest for personal mobile phones, company computers, and company laptops, and overwhelmingly in favour of personal mobile phones. The use of laptops could potentially be impacted by the pandemic and the switch to remote work, while the heavy reliance on personal mobile phones could be due to its accessibility and wide range of essential functions at a low cost.

The implications of these findings would be explored more in subsequent sections, but a key point to note would be that optimizing digitization efforts to be accessible via mobile in addition to via PC would potentially increase its effectiveness over time as it would provide an additional means of access to information in a more user-friendly format.

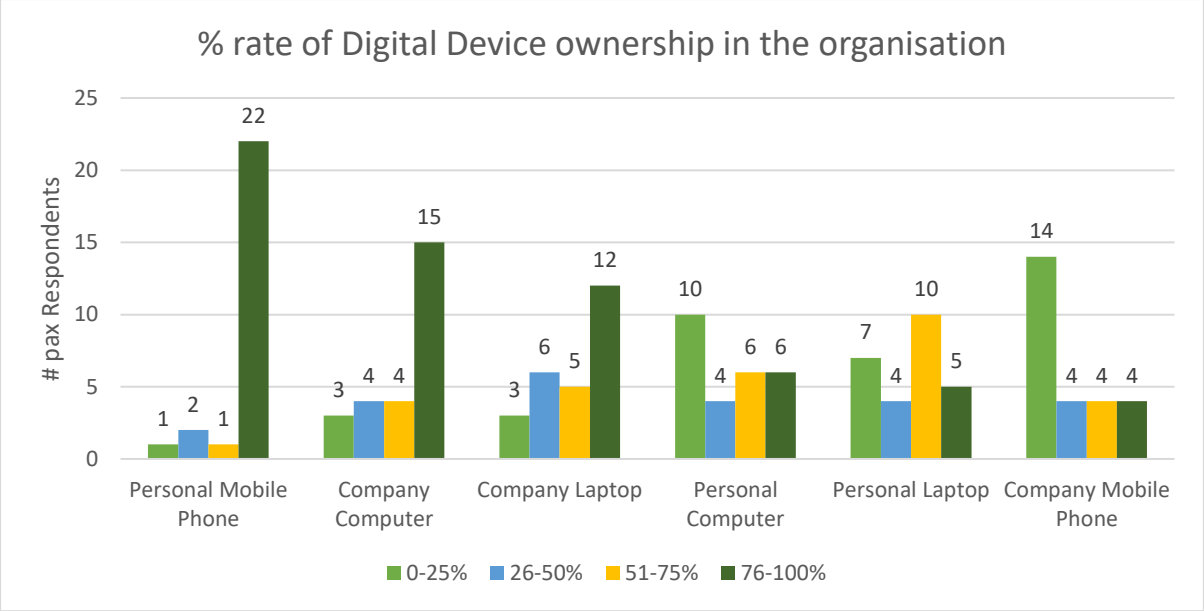


Diagram 18. Usage rates of modes of Digital Device ownership across ASEAN EBMOS.

Training provision

Majority of responses indicated a hybrid model of training, utilising both physical and virtual training. From interviews most EBMOs utilise a blended learning approach for training, where part of the curriculum content is delivered online and part is delivered in person. This reflects the emerging needs of clients as increased restrictions are implemented for health and safety purposes, and training has to adapt due to legal requirements.

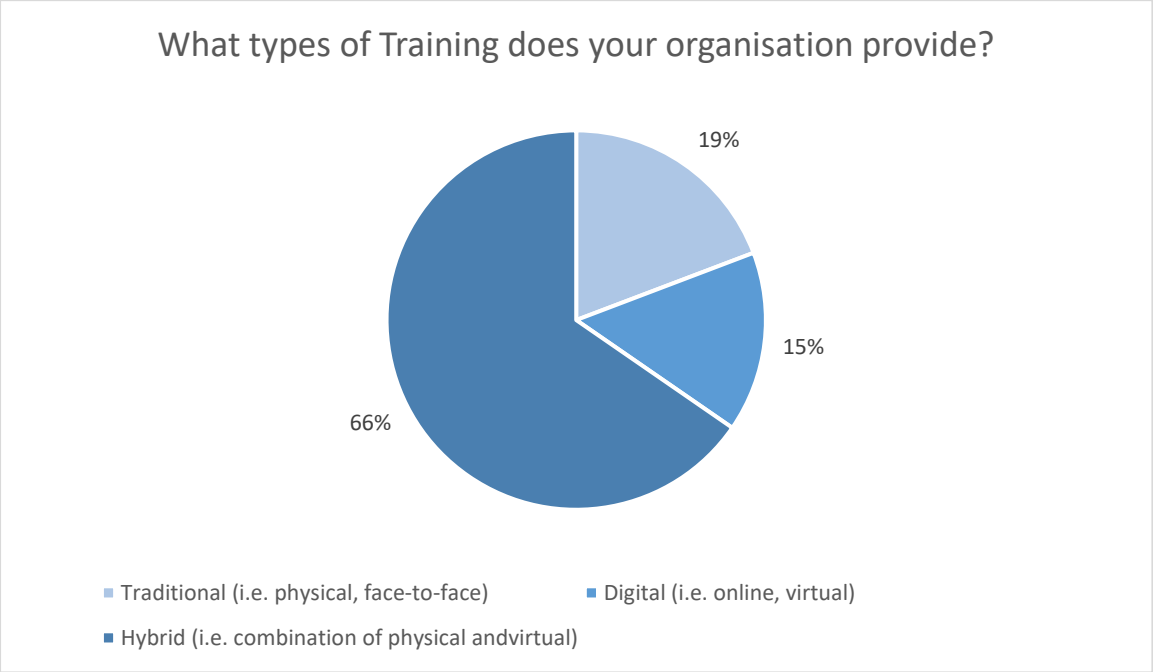


Diagram 19. Types of Training provided across ASEAN EBMOs.

As for the training provision processes/systems used across ASEAN EBMOs, training delivery software, post-training feedback and improvement, training activities and at 4th place manual ranked the highest potentially due to the blended learning approach for training. However, there is low usage rates for Learning Management System (LMS) and Content Authoring Systems in ASEAN EBMOs.

It is encouraging that digital solutions are being utilised alongside manual approaches, and reasons as to why both are being used concurrently is explored further in subsequent sections. However a key point to note would be the challenges in not just purchase and maintenance costs of the digital solution but also ensuring that trainers, administrators, and participants know how to use these systems to conduct and access training and events which is potentially much more challenging.

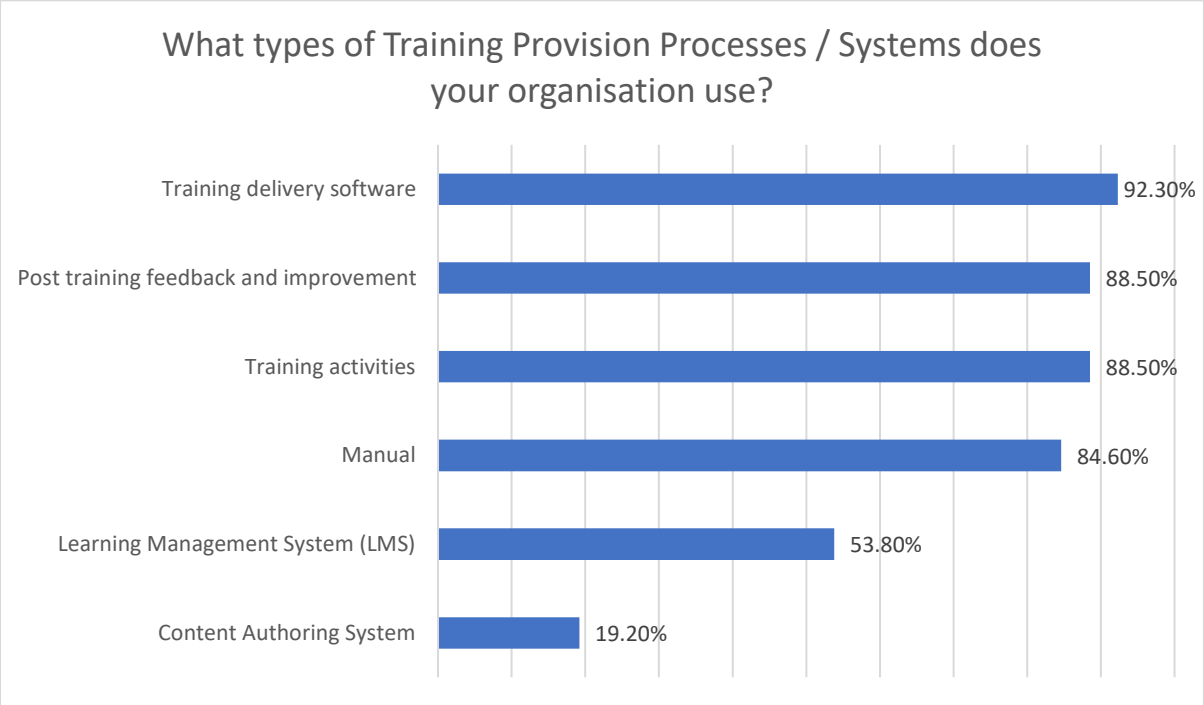


Diagram 20. Types of Training Provision Processes/Systems used across ASEAN EBMOS.

Next, when importance was assessed, most training processes/systems were scored of high importance, potentially due to its importance during the pandemic where day-to-day processes are impacted. However, the usage of Learning Management System (LMS) and Content Authoring System is ranked lower in comparison at 53.8% and 19.2% respectively.

This could be due to the costs involved in purchasing the system as well as training staff to use the system and engaging developers to convert or develop courseware for the system to utilise. ILO has been supporting this capacity by developing an eCampus LMS which is explored in subsequent sections in more detail, but the goal is to provide EBMOs with a lowered cost and barriers to

adopting LMS in the EBMO. Content Authoring would be the next step after adopting an LMS, hence it is reasonable that it was rated even lower than the LMS in terms of importance.

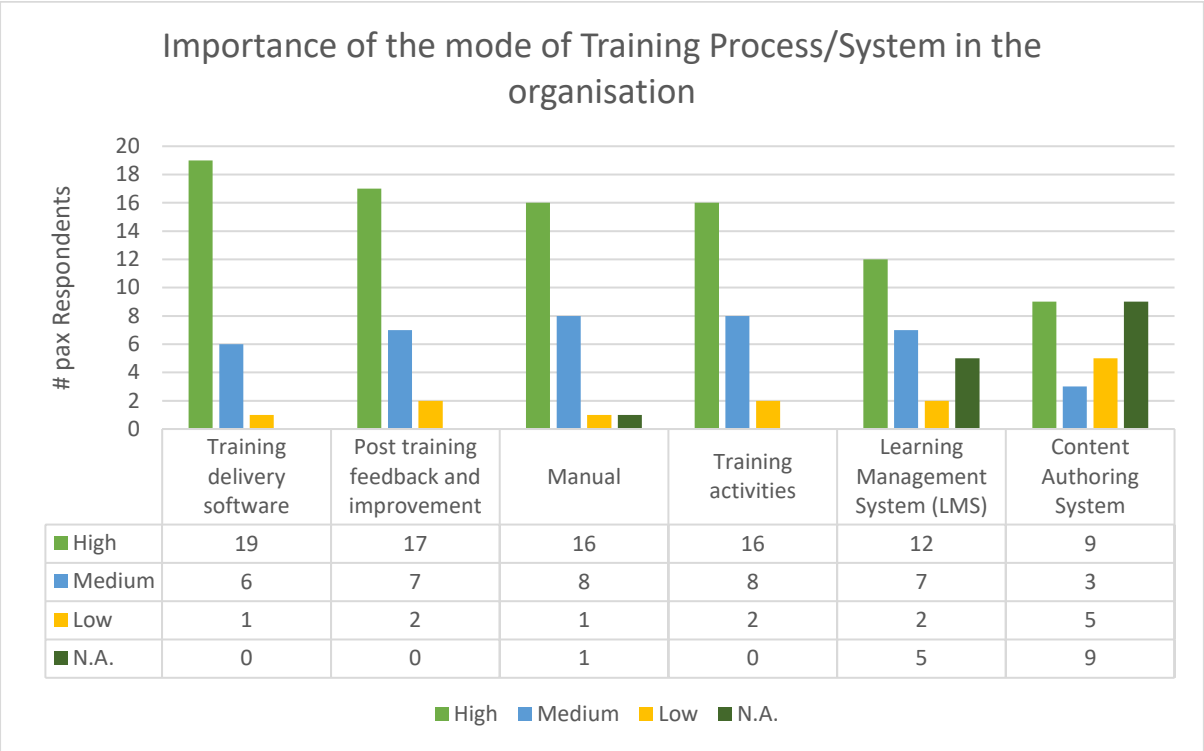


Diagram 21. Importance of the mode of Training Process/System used across ASEAN EBMOS.

The frequency of usage of these training processes/systems match the findings above; apart from LMS and Content Authoring System as they are associated with more negative scores. This would most likely be due to limited capabilities, although it is encouraging that for EBMOs who do have such capabilities, it is typically used “Very Often” or “Often”. This could indicate a general interest in adopting such solutions, although there may be obstacles or setbacks to adoption.

It was also acknowledged that “Training activities” was defined as “polls, quizzes, and games” in the survey, which did not shed light on whether it was conducted in digital format or in classroom format. Further exploration revealed that a combination of digital and classroom activities were used, although digital activities were used much less frequently due to the technical complexity in learning as well as for participants to learn and utilise on the spot during the workshop or event directly, as it required a level of digital literacy and proficiency.

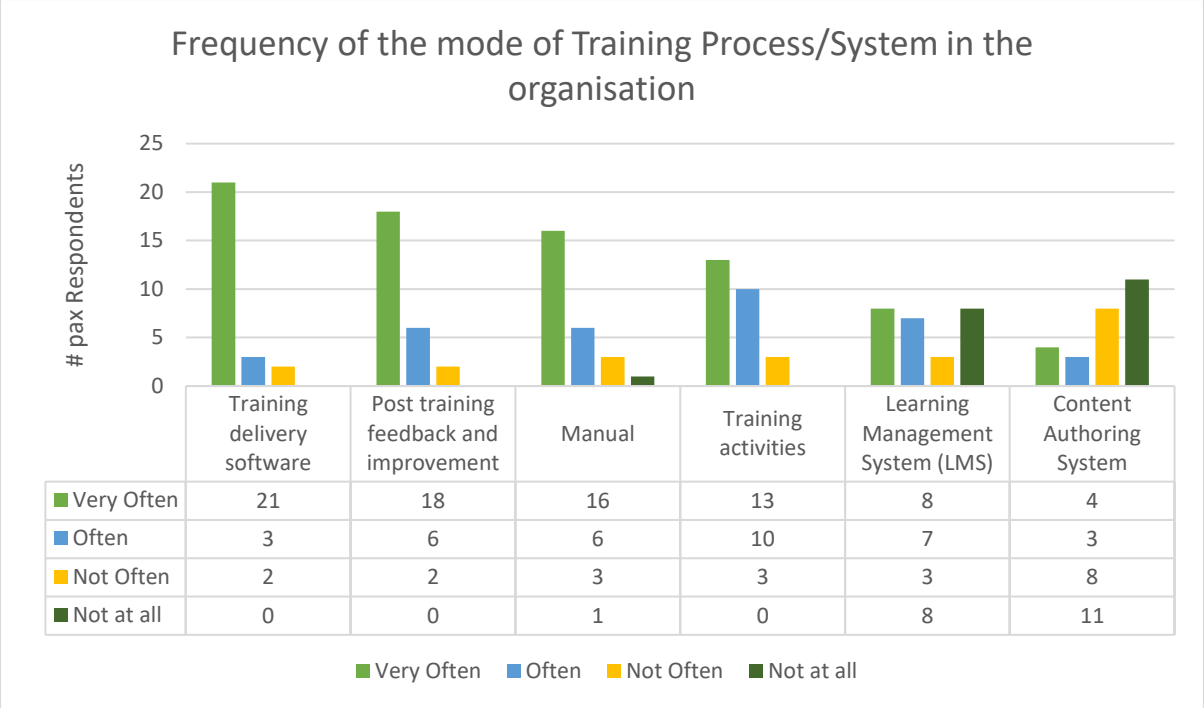


Diagram 22. Frequency of the mode of Training Process/System used across ASEAN EBMOS.

When Importance and Frequency is compared for Training Process / System usage, potential areas for development emerge as follows:

1. Content Authoring System
2. Learning Management System (LMS)

There is a clear gap identified for the two potential areas for development, highlighting that these are potential areas that can be developed in the near future despite the low scores. Further sharing also reveal that such capabilities are already in plans to be developed in the near future, with additional funding and capabilities support, hence it is likely for ASEAN EBMOs to develop such capabilities in the near future.

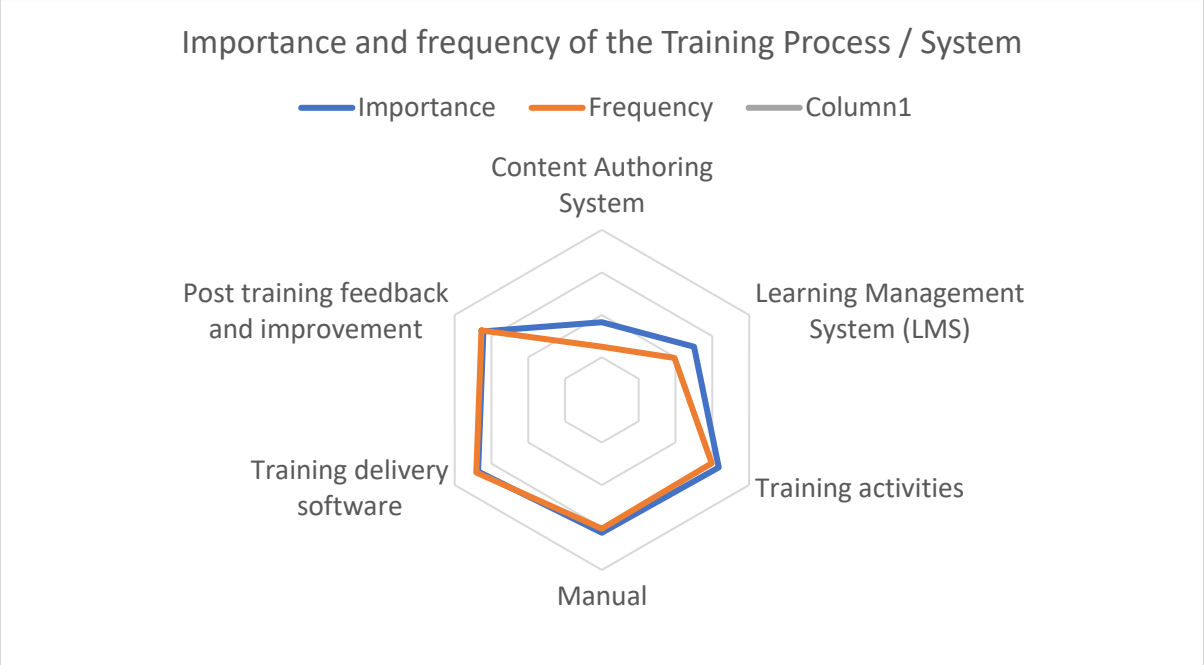


Diagram 23. Importance and Frequency of the Training Process/System used across ASEAN EBMOS.

There is a range of responses in terms of development urgency throughout all training processes/systems from immediate development to short/long term development to no willingness to develop. However, there is more willingness to develop most training processes/systems apart from the manual training process. This can potentially be as a result of the relatively recent transition to online modes of training provision and the reduced reliance on manual training processes in the face of current health and safety purposes.

Further exploration in interviews also uncovered that some of these were of lower priority because EBMOs had already developed such capabilities to a fairly robust or advanced level, hence there is no urgent need to further develop these capabilities, and that time and effort can be spent on developing more urgent or emerging capabilities or areas of work to improve the EBMO's adaptability to the current global situation and its demands.

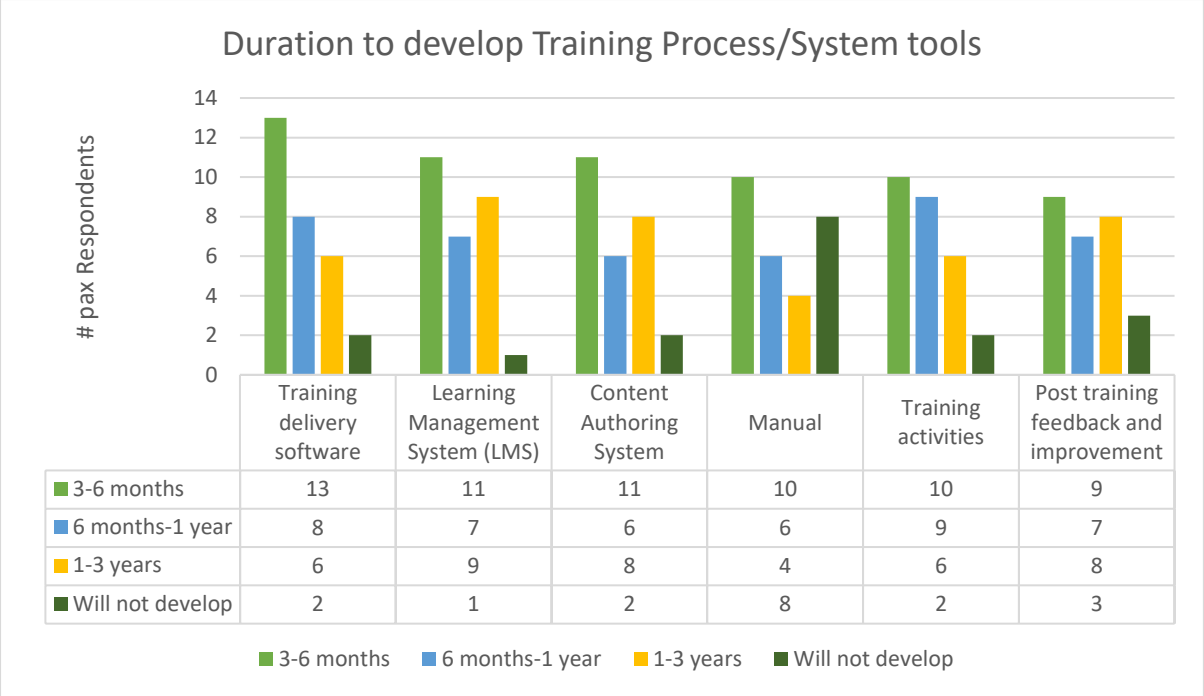


Diagram 24. Duration to develop Training Process/System tools across ASEAN EBMOS.

Staff digital literacy/proficiency

It is encouraging to see that the findings for all types of digital literacy skills of ASEAN EBMOs lie within the highest quartile of staff skill possession (i.e. above 75%). This indicates that all EBMOs have the skills at a certain level within the organisation, although whether it is only a select few individuals who possess the skills or whether it is a common skill across the organisation is not reflected in the survey.

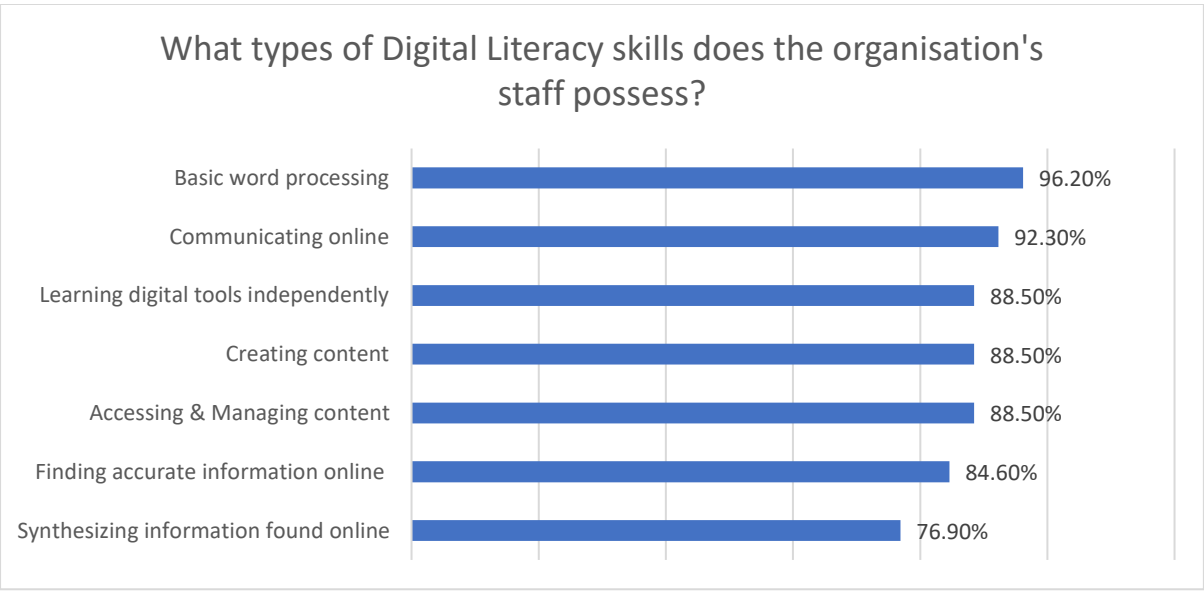


Diagram 25. Types of Digital Literacy skills possessed across ASEAN EBMOS.

Organisations are most proficient in Basic word processing skills, Communication skills, and Accessing & managing content. These are essential to business operations and are more critical, however digital literacy skills like Synthesizing information (i.e. reporting & analytics), Creating content, and Independent learning can be further developed.

Digital literacy is key in the current business environment as organisations are forced to pivot to digital to stay afloat and maintain operations when face-to-face interactions are being increasingly restricted. Hence it is encouraging to see that majority of ASEAN EBMOs are at the Intermediate level across the board for all elements of Digital Literacy, and potentially can work to strengthen existing capabilities to Advanced level of proficiency to stay competitive globally, as well as develop weaker capabilities.

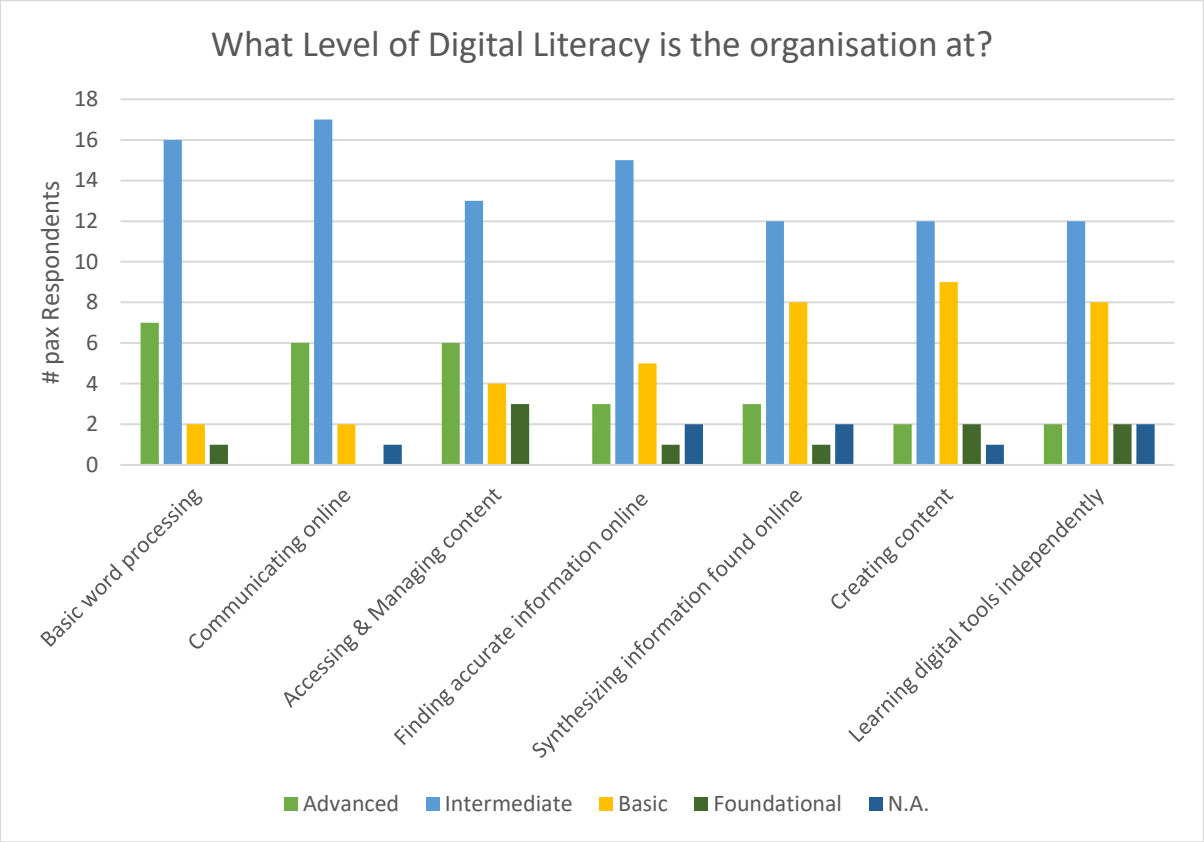


Diagram 26. Level of Digital Literacy in EBMOs across ASEAN EBMOS.

Once scores have been averaged out, the average level of digital literacy falls between Intermediate and Basic, but still remains above the Foundational level. This is encouraging because in today's day and age, foundational digital literacy skills are no longer sufficient to perform effectively in the workplace, and at the very least basic skills are needed. Similarly, among the youth today and in the school environment, there is increasing use of digital tools and mediums for teaching, learning, and communications, especially at the tertiary level (i.e. conducting research and analysis, report writing, presentations) hence the working environment also needs to keep up and stay relevant.

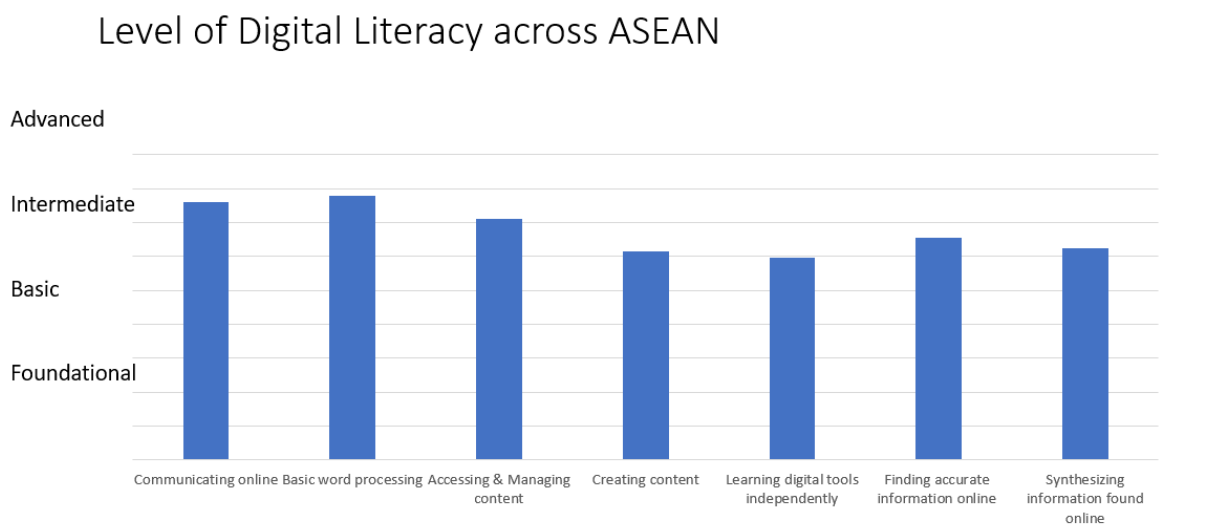


Diagram 27. Level of Digital Literacy across ASEAN EBMOs.

As for EBMOs views on digitisation, most EBMOs tend to have neutral and positive views on digitisation. However, there was a range of opinions on whether digital tools are seen as an obstacle/hindrance to the company's performance where the EBMOs' views on it was conflicting. This was explored further in interviews and boiled down to a few main concerns.

Firstly, a company's digital image cannot be as easily curated and managed as compared to traditional networking. If a social media scandal happens, news can spiral out of control quickly and it would be very hard to remedy or mitigate the situation.

Next, people can create duplicates of media and content on the internet, hence there is a concern of Intellectual Property Rights and illegal dissemination or sharing of paid information that would otherwise traditionally have been easily to secure. For instance, it is easy to email a copy of a digital document to a friend, while in reality it might be harder to duplicate a document and it would potentially be easier to trace such acts of IP infringement.

Lastly, a major concern is security, where there are concerns that members' information may be leaked whether accidentally or otherwise causing security breaches and a loss of trust in the EBMO. Security software is very expensive, and needs supporting policies and processes to ensure that all staff are aware of how to handle confidential information the right way in a digital format. If information is stored in a hardcopy format, it is more easily secured under lock and key to manage security risks.

Hence the concerns raised are valid, but can be managed with some effort such as by having a PR or IT Security team, as well as using the relevant and most robust platforms to minimize risks.

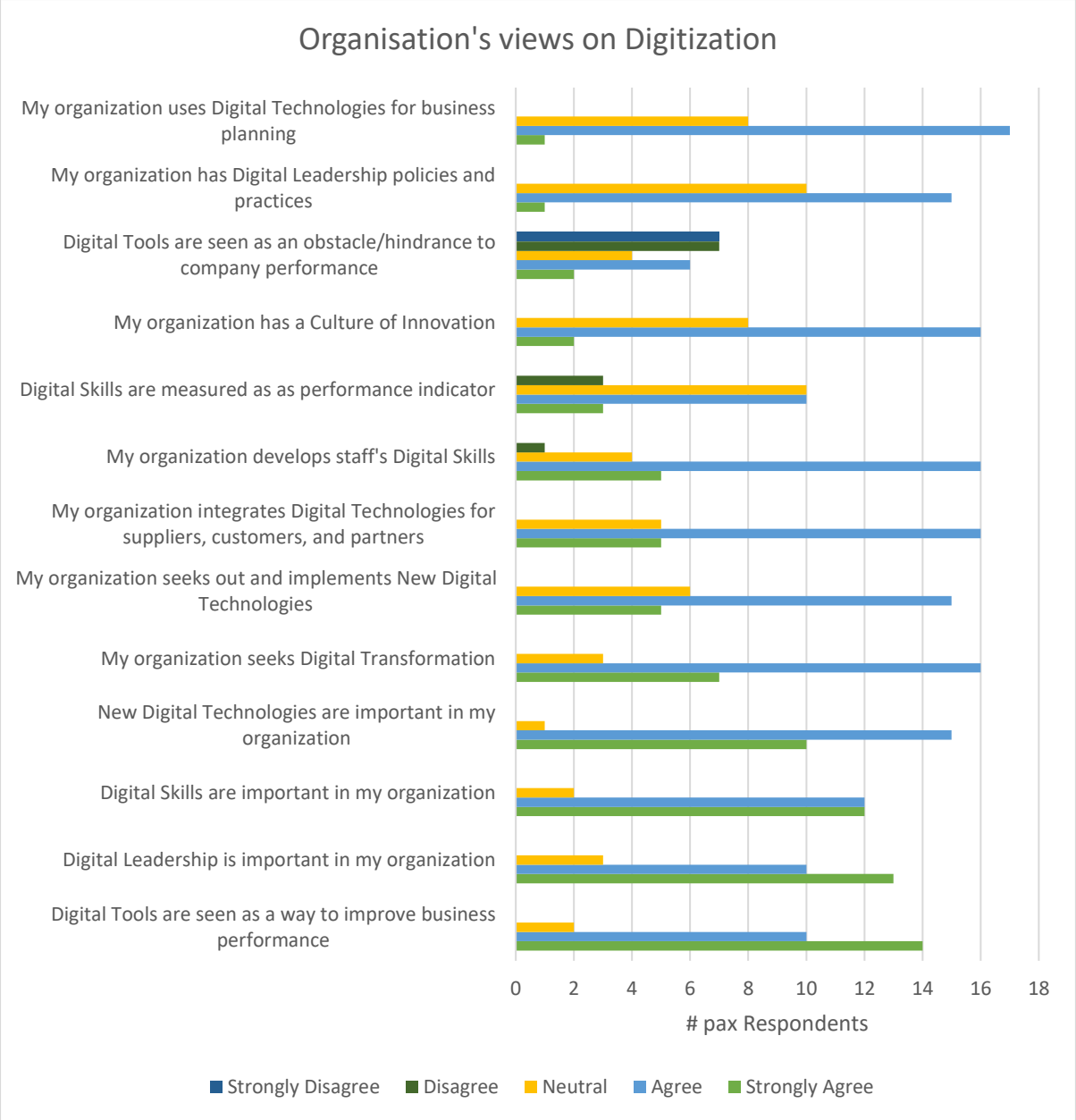


Diagram 28. EBMOs views on Digitisation across ASEAN EBMOS.

Findings by Country

Singapore – Singapore National Employers Federation (SNEF)

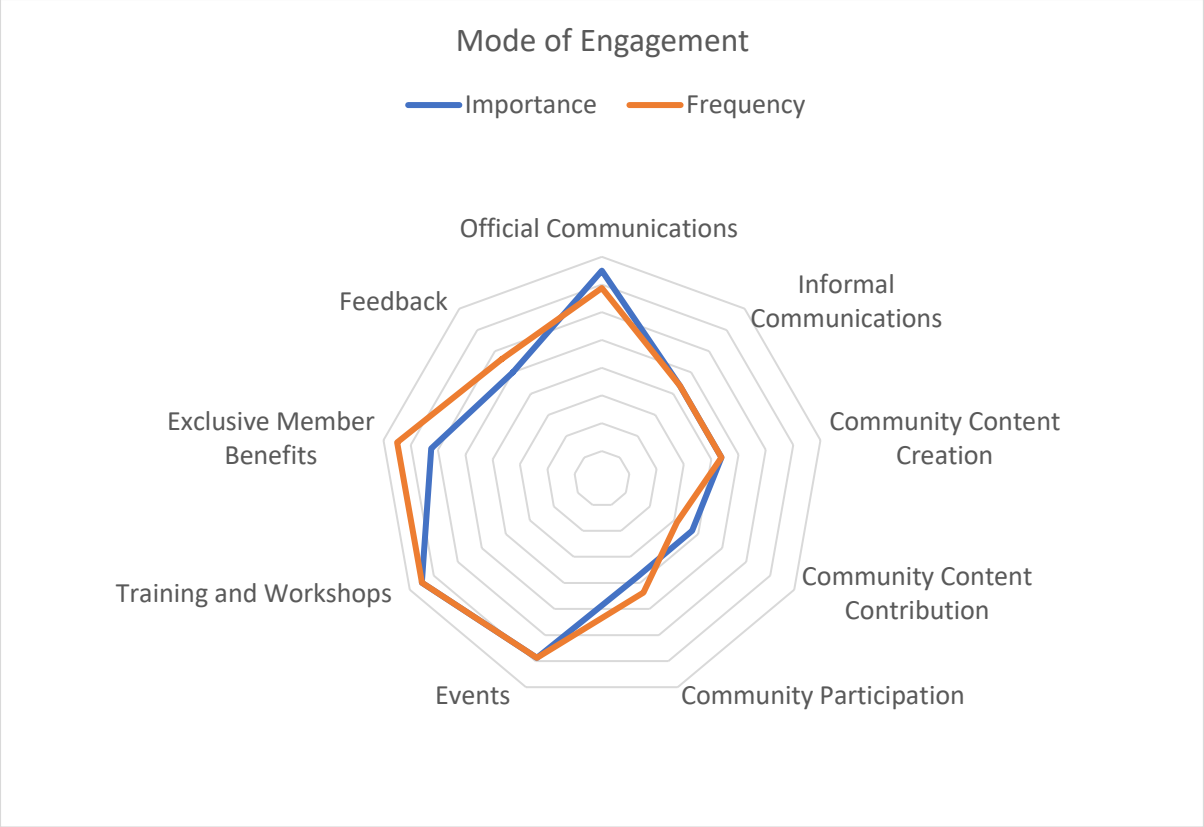


Diagram 29. Importance and Frequency of the mode of Engagement at SNEF.

For SNEF's mode of engagement, a few gaps can be identified between the mode's importance and frequency in *Diagram 29*. For instance, there is a gap between the importance and frequency of Official Communications and Community Content Contribution where the importance of these modes is higher than their frequency. This suggests that SNEF can look into further developing these modes to fully utilise them. Similarly, there is also a gap between the importance and frequency of Community Participation, Exclusive Member Benefits, and Feedback where the frequency of these modes is higher than their importance. This suggests that SNEF may be spending too much time and effort on these modes.

Overall, the modes of engagement where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, SNEF can consider developing the modes of engagement with relatively low scores such as Community Content Creation in the longer term. Similarly, although Training and Workshops as well as Events have no gaps and are scored high indicating that there is no urgency to develop these areas in the immediate future, SNEF may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

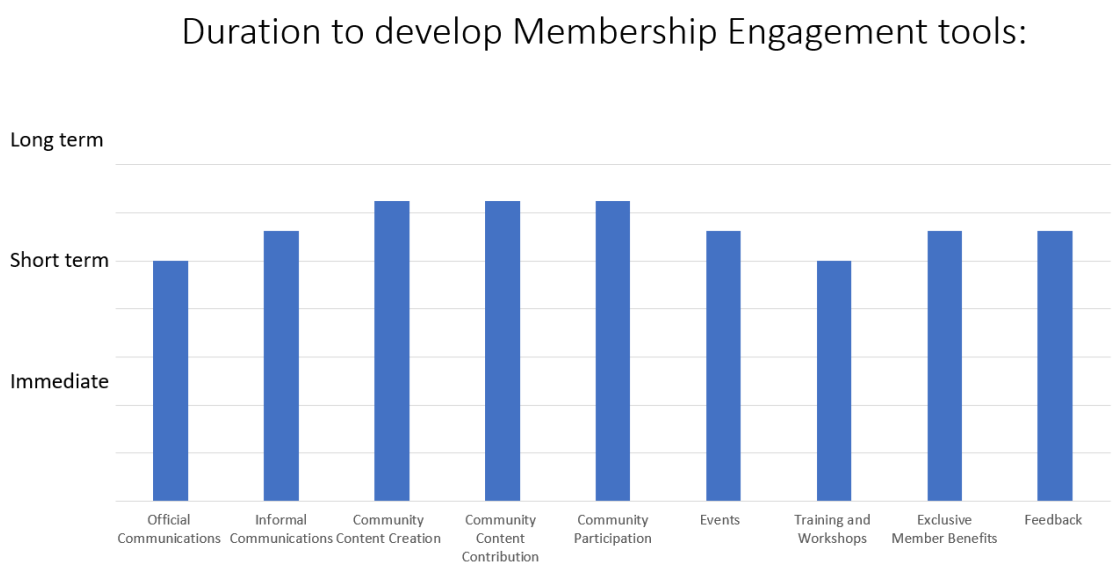


Diagram 30. Duration to develop Membership Engagement tools at SNEF.

To begin, the low scores in *Diagram 30* indicate higher priority to SNEF to develop Membership Engagement tools and high scores indicate a lower priority to develop Membership Engagement tools. For instance, Offical Communications as well as Training and Workshops are scored the lowest indicating that the development of these modes of engagement are considered SNEF's highest priority. Similarly, Community Content Creation, Community Content Contribution, and Community Participation are scored the highest and therefore considered to be SNEF's lowest priority in terms of developing membership engagement tools.

Corresponding to *Diagram 29*, it can be deduced that the importance of the mode of engagement impacts the level of urgency more than the gap areas. For instance, both Official Communications and Training and Workshops are scored highly in terms of importance whereas Community Content Creation, Community Content Contribution, and Community Participation are scored lowest in terms of importance in *Diagram 29*. Hence, to promote growth and competitiveness of SNEF, gap areas may want to be considered for development as well to improve SNEF's digital capabilities.

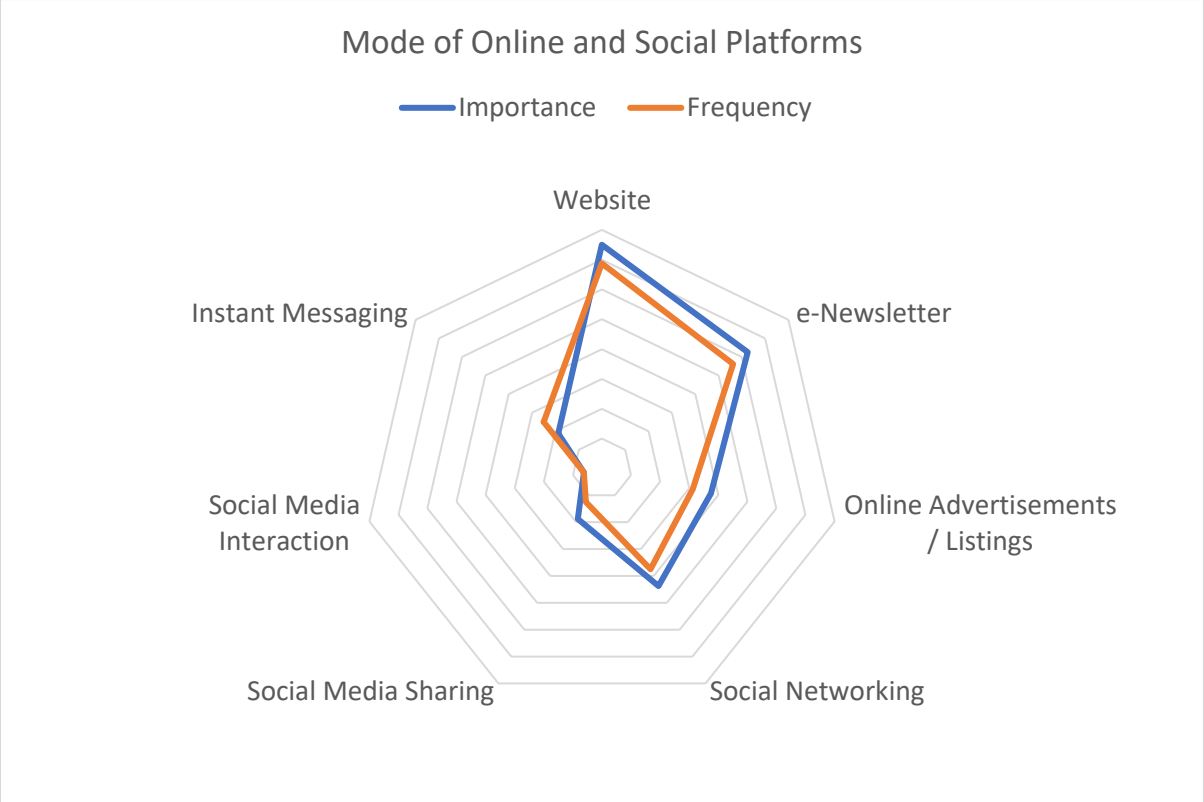


Diagram 31. Importance and Frequency of the mode of Online and Social Platforms at SNEF.

For SNEF's mode of online and social platforms, a few gaps can be identified between the mode's importance and frequency in *Diagram 31*. For instance, there is a gap between the importance and frequency of Website, e-Newsletter, Online Advertisement's/Listings, Social Networking, and Social Media Sharing where the importance of these modes is higher than their frequency. This suggests that SNEF can look into further developing these modes to fully utilise them. Similarly, there is also a gap between the importance and frequency of Instant Messaging where the frequency of this mode of online and social platform is higher than its importance. This suggests that SNEF may be spending too much time and effort on this mode of online and social platform.

Although the modes of engagement where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage, SNEF can consider developing Social Media Interaction in the longer term due to its overall low score.

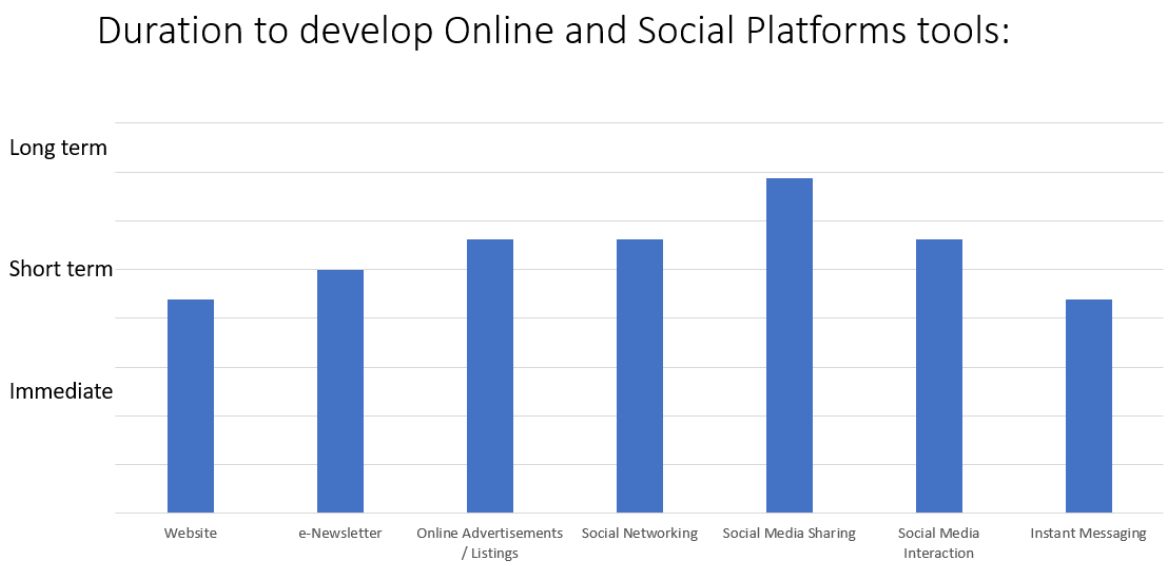


Diagram 32. Duration to develop Online and Social Platform tools at SNEF.

The low scores in *Diagram 32* indicate higher priority to SNEF to develop Online and Social Platforms tools and high scores indicate a lower priority to develop Online and Social Platforms tools. For instance, Website and Instant Messaging are scored the lowest indicating that the development of these modes of Online and Social Platforms are considered SNEF's highest priority. Similarly, Social Media Sharing is scored the highest and is therefore considered to be SNEF's lowest priority in terms of developing Online and Social Platforms tools.

Corresponding to *Diagram 31*, it can be deduced that the importance of the mode of Online and Social Platforms impacts the level of urgency more than the gap areas. For instance, Website is scored highly in terms of importance whereas Social Media Sharing is scored lowest in terms of importance in *Diagram 31*. However, the gap area from *Diagram 31* between the importance and frequency of Instant Messaging is addressed in *Diagram 32,* where it is considered a relatively urgent matter to develop. To further promote growth and competitiveness of SNEF, the other gap areas may want to be considered for development as well to improve SNEF's digital capabilities as they require different actions.

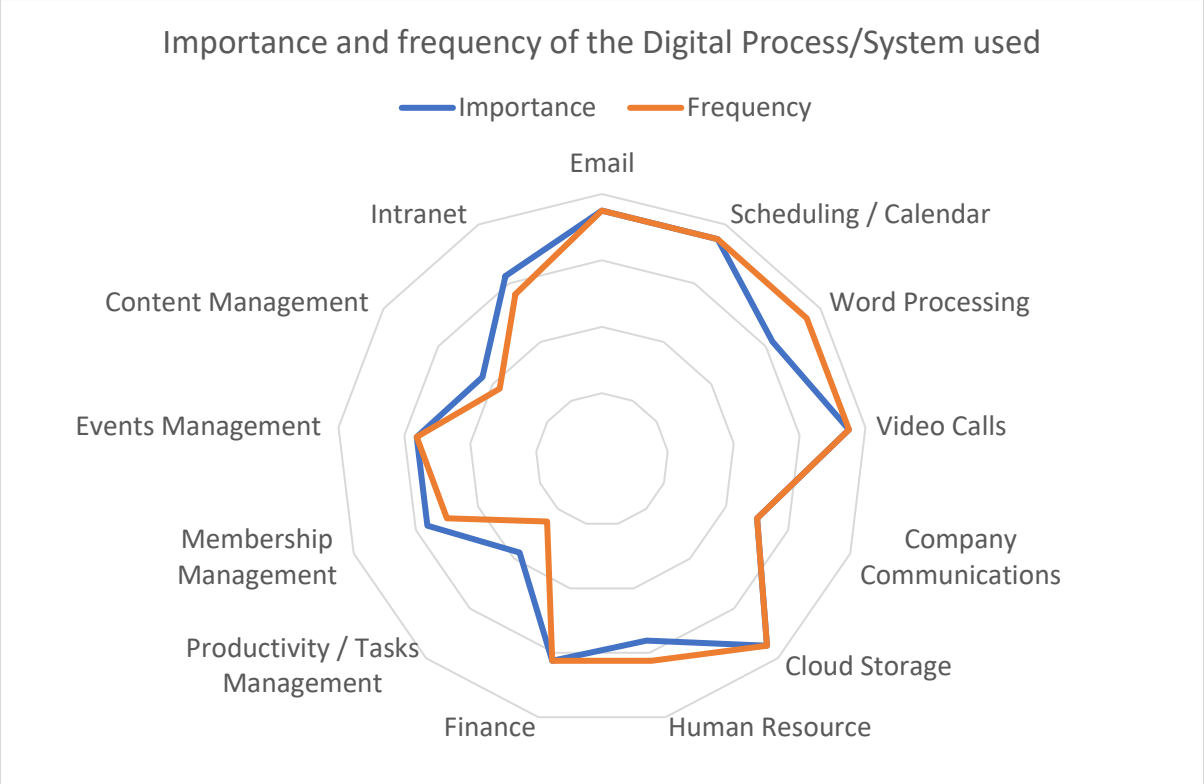


Diagram 33. Importance and Frequency of the Digital Process/System used at SNEF.

For SNEF's Digital Processes/Systems, a few gaps can be identified between the Digital Processes/Systems' importance and frequency in *Diagram 33*. For instance, there is a gap between the importance and frequency of Productivity/Tasks Management, Membership Management, Content Management, and Intranet where the importance of these Digital Processes/Systems is higher than their frequency. This suggests that SNEF can look into further developing these Digital Processes/Systems to fully utilise them. Similarly, there is also a gap between the importance and frequency of Word Processing and Human Resource where the frequency of these Digital Processes/Systems is higher than their importance. This suggests that SNEF may be spending too much time and effort on these Digital Processes/Systems.

Overall, the Digital Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, SNEF can consider developing the Digital Processes/Systems with relatively low scores such as Company Communications in the longer term. Similarly, although Emails, Scheduling/Calendar, Video Calls, Cloud Storage, Finance, and Events Management have no gaps and are scored high indicating that there is no urgency to develop these Digital Processes/Systems in the immediate future, SNEF may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

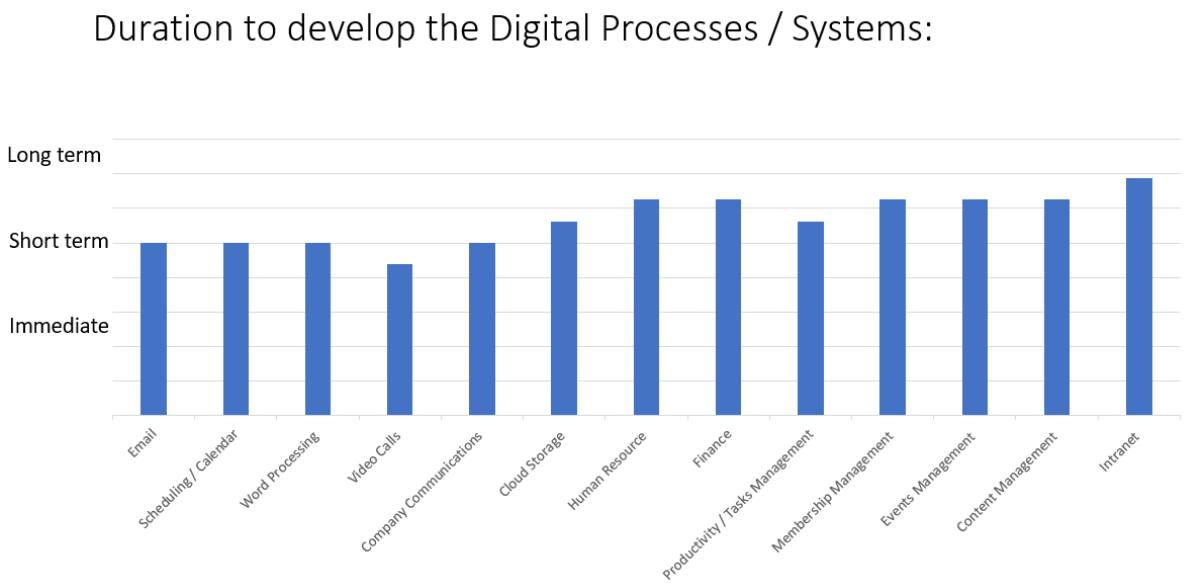


Diagram 34. Duration to develop Digital Processes/Systems at SNEF.

The low scores in *Diagram 34* indicate higher priority to SNEF to develop Digital Processes/Systems and high scores indicate a lower priority to develop Digital Processes/Systems. For instance, Video Calls are scored the lowest indicating that the development of this Digital Process/System is considered SNEF's highest priority. Similarly, Intranet is scored the highest and is therefore considered to be SNEF's lowest priority in terms of developing Digital Processes/Systems.

Corresponding to *Diagram 33*, it can be deduced that the importance of the mode of Digital Processes/Systems impacts the level of urgency more than the gap areas. For instance, Video Calls are scored highly in terms of importance in *Diagram 33* and is considered to be the most urgent matter to address in *Diagram 34*. However, this could also be as a result of the increased reliance on video calls during the pandemic. Overall, to promote growth and competitiveness of SNEF, other gap areas such as Emails, Scheduling/Calendar, Company Communications, Cloud Storage, Finance, and Events Management may want to be considered for development as well to improve SNEF's digital capabilities.

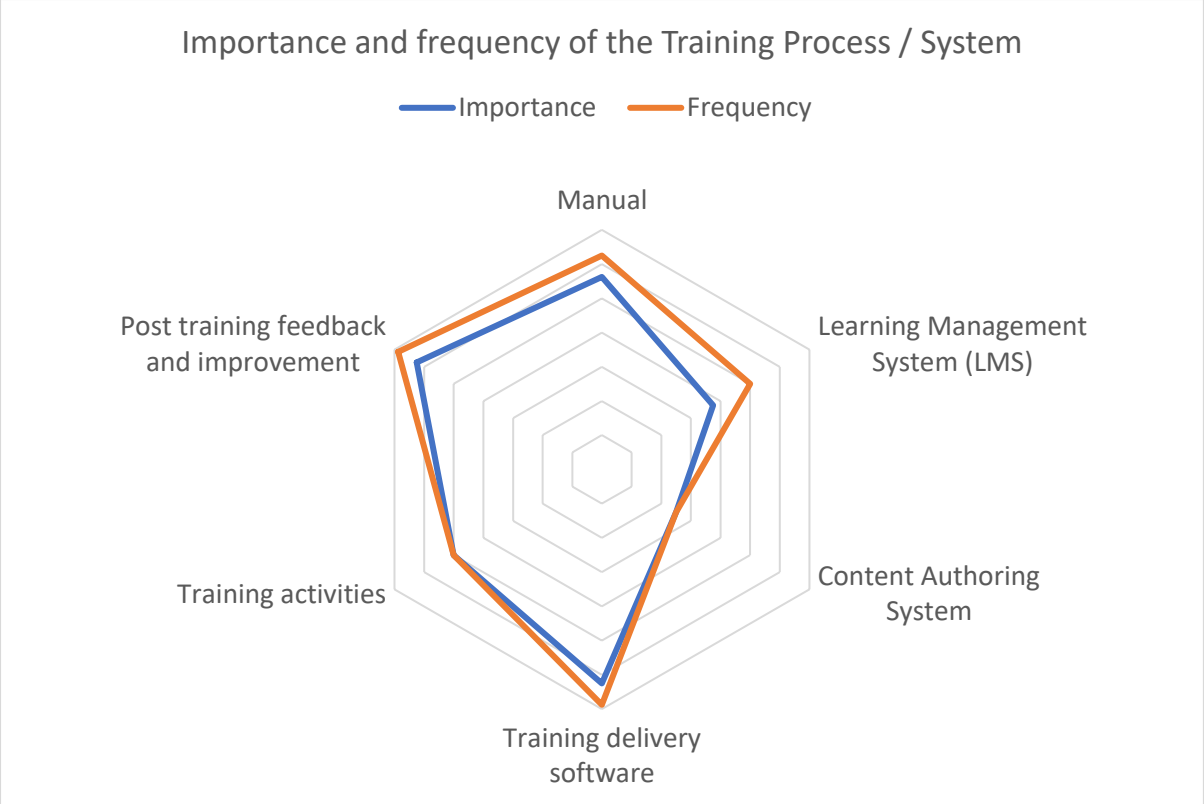


Diagram 35. Importance and Frequency of the Training Process/System used at SNEF.

For SNEF's Training Processes/Systems, a few gaps can be identified between the mode's importance and frequency in *Diagram 35*. For instance, there is a gap between the importance and frequency of Manual, LMS, Training delivery software, and Post training feedback and improvement where the frequency of these Training Processes/Systems is higher than their importance. This suggests that SNEF may be spending too much time and effort on these Training Processes/Systems.

Overall, the Training Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, SNEF can consider developing the Training Processes/Systems with relatively low scores such as Content Authoring System in the longer term. Similarly, although Training activities has no gap and is scored relatively high, indicating that there is no urgency to develop these areas in the immediate future, SNEF may want to continue keeping up with trends in this area as any further improvements will have a relatively large impact on the organisation.

,

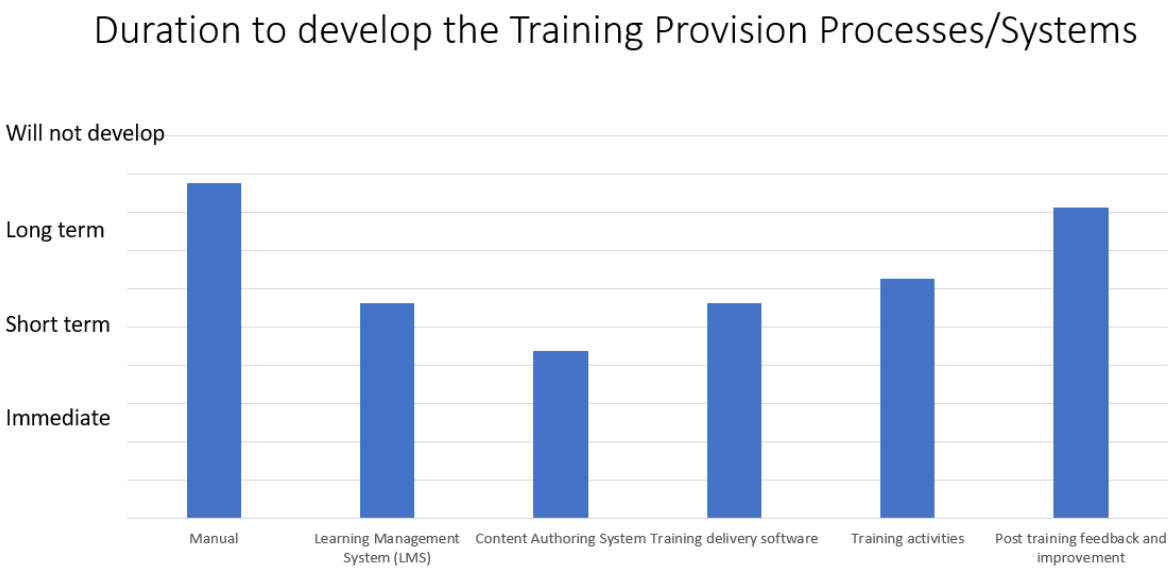


Diagram 36. Duration to develop Training Processes/Systems at SNEF.

To begin, the low scores in *Diagram 36* indicate higher priority to SNEF to develop Training Processes/Systems and high scores indicate a lower priority to develop Training Processes/Systems. For instance, Content Authoring System scored the lowest indicating that the development of this Training Process/System is considered SNEF's highest priority. Similarly, Manual and Post training feedback and improvement are scored the highest and therefore considered to be SNEF's lowest priority in terms of developing Training Processes/Systems.

Corresponding to *Diagram 35*, it can be deduced that SNEF is considering developing the Training Process/System with the lowest scores, Content Authoring System. This is reflected in *Diagram 36* where SNEF is hoping to develop Content Authoring System the soonest in contrast to the highest scores from *Diagram 35*, Manual and Post training feedback and improvement. However, SNEF should also take the other gap areas from *Diagram 35* into consideration to promote growth and competitiveness of SNEF.

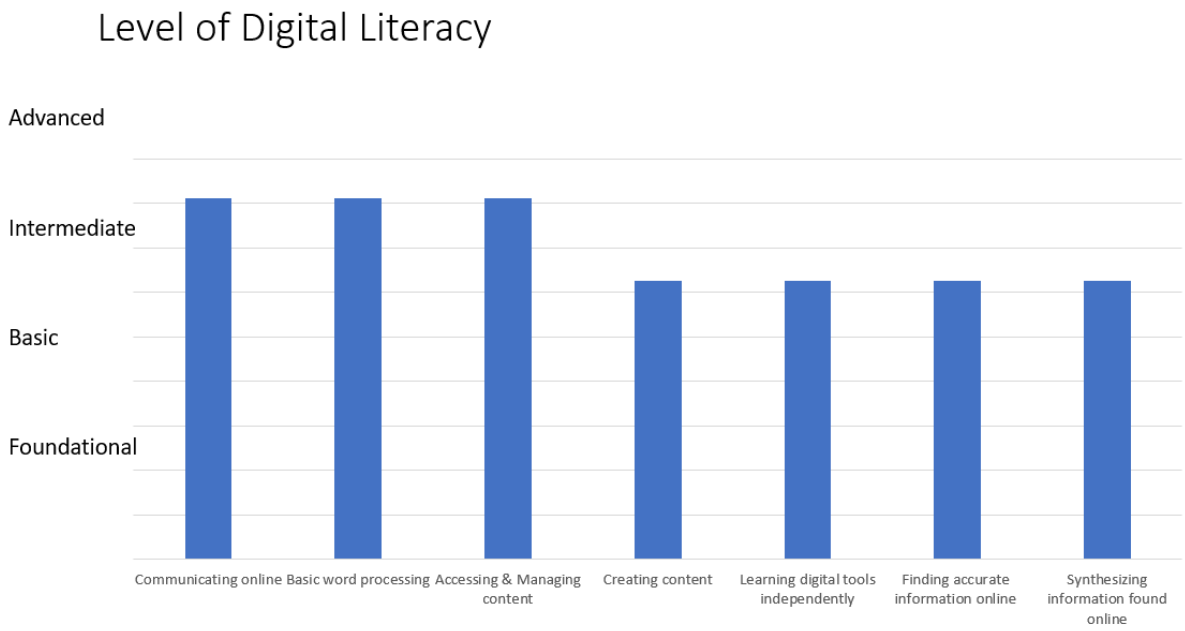


Diagram 37. Level of Digital Literacy at SNEF.

For SNEF's Staff Digital Literacy rates, *Diagram 37* indicates that the higher scores indicate higher levels of digital literacy and vice versa. For instance, communicating online, basic word processing, and accessing & managing content are the highest scores indicated by *Diagram 37*. Similarly, creating content, learning digital tools independently, finding accurate information online, and synthesizing information found online indicate lower digital literacy skills. Overall, SNEF displays relatively high digital literacy rates that are beyond basic skills, yet not quite advanced yet.

Cambodia – Cambodian Federation of Employers and Business Associations (CAMFEBA)

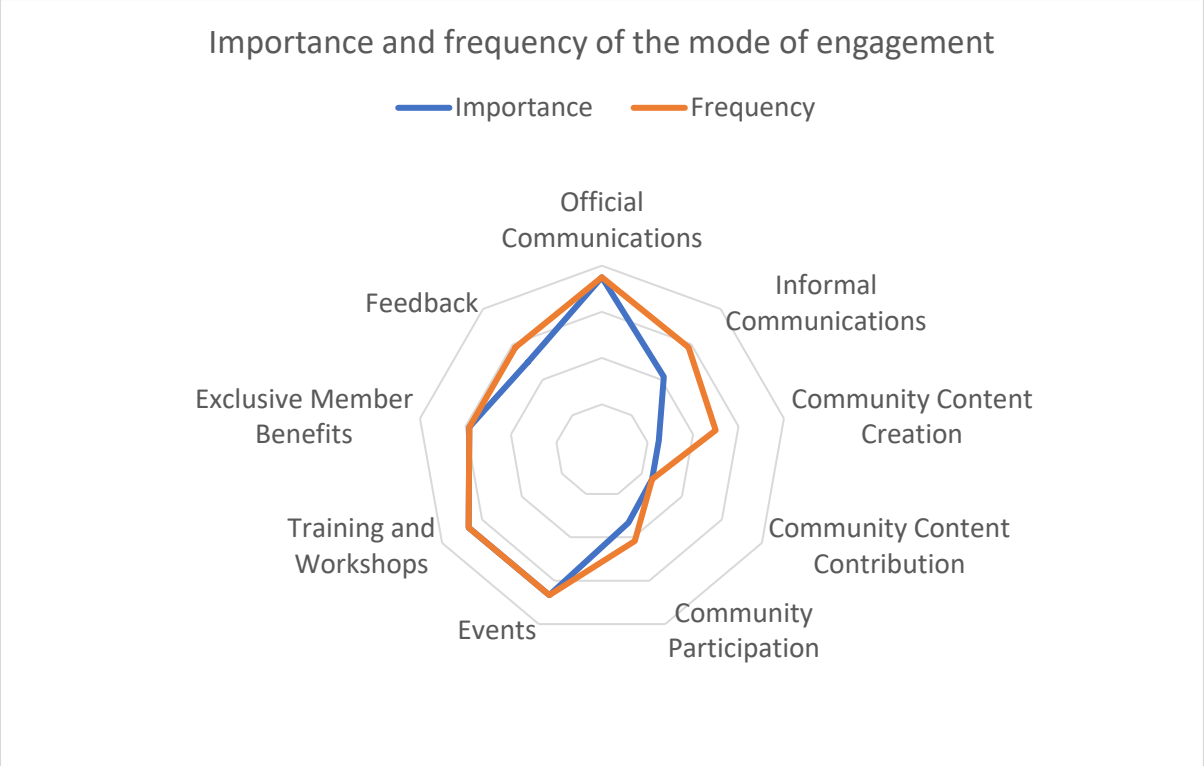


Diagram 38. Importance and Frequency of the mode of Engagement at CAMFEBA.

For CAMFEBA's mode of engagement, a few gaps can be identified between the mode's importance and frequency in *Diagram 38*. For instance, there is a gap between the importance and frequency of Informal Communications, Community Content Creation, Community Participation, and Feedback where the frequency of these modes is higher than their importance. This suggests that CAMFEBA may be spending too much time and effort on these modes.

Overall, the modes of engagement where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, CAMFEBA can consider developing the modes of engagement with relatively low scores such as Community Content Contribution in the longer term. Similarly, although Official Communications, Events, Training and Workshops, and Exclusive Member Benefits have no gaps and are scored high indicating that there is no urgency to develop these areas in the immediate future, CAMFEBA may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

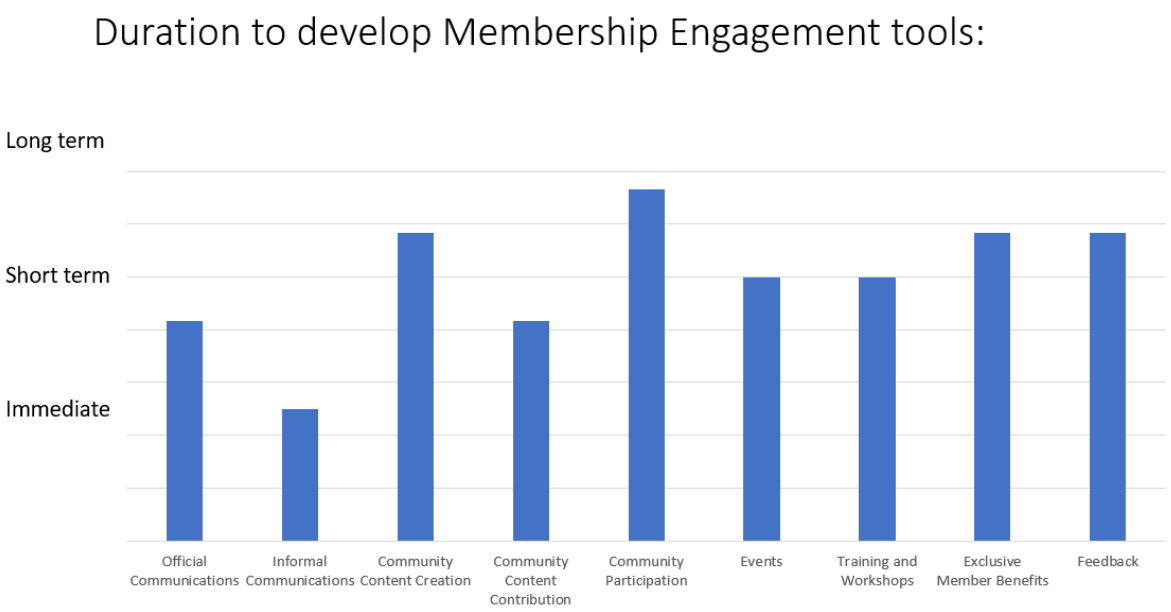


Diagram 39. Duration to develop Membership Engagement tools at CAMFEBA.

To begin, the low scores in *Diagram 39* indicate higher priority to CAMFEBA to develop Membership Engagement tools and high scores indicate a lower priority to develop Membership Engagement tools. For instance, Offical Communications and Informal Communications are scored the lowest indicating that the development of these modes of engagement are considered CAMFEBA's highest priority. Similarly, Community Participation, Community Content Creation, Exclusive Member Benefits, and Feedback are scored the highest and therefore considered to be CAMFEBA's lowest priority in terms of developing membership engagement tools.

Corresponding to *Diagram 38*, one of the gap areas with relatively high scores, Informal Communications, is addressed where CAMFEBA is planning on developing the Membership Enagement tool between 3-6 months. However, the larger gap between the importance and frequency of the mode of engagement, Community Content Creation, does not match the level of urgency in terms of priority. Similarly, it can be deduced that the importance of the mode of engagement impacts the level of urgency more than the gap areas in terms of Official Communications as it displays the highest levels of importance in *Diagram 38* and indicates higher priority in *Diagram 39*. Equivilantly, Community Participation indicates low priority in *Diagram 39* and low levels of importance in *Diagram 38.*

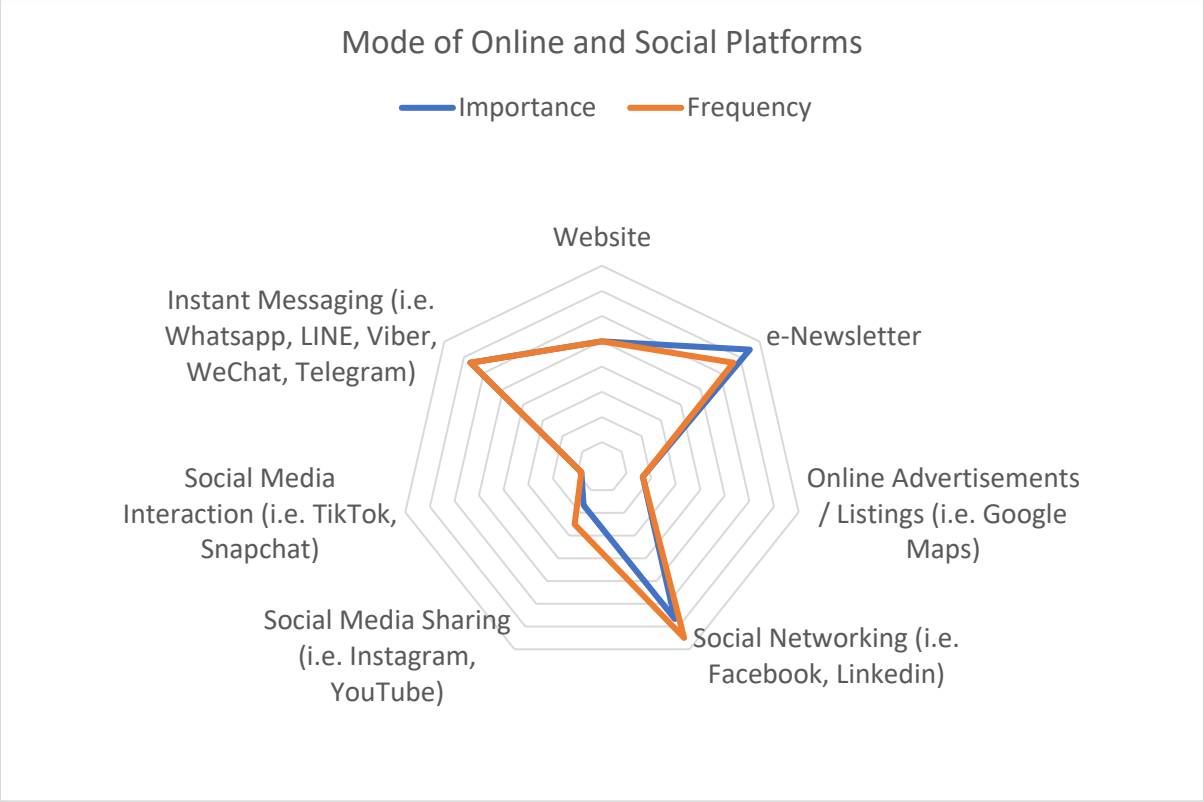


Diagram 40. Importance and Frequency of the mode of Online and Social Platforms at CAMFEBA.

For CAMFEBA's mode of online and social platforms, a few gaps can be identified between the mode's importance and frequency in *Diagram 40*. For instance, there is a gap between the importance and frequency of e-Newsletter where the importance of this mode is higher than its frequency. This suggests that CAMFEBA can look into further developing these modes to fully utilise them. Similarly, there is also a gap between the importance and frequency of Social Networking and Social Media Sharing where the frequency of these modes of online and social platforms is higher than their importance. This suggests that CAMFEBA may be spending too much time and effort on these modes of online and social platforms.

Although the modes of engagement where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage, CAMFEBA can consider developing Online Advertisements/Listings and Social Media Interaction in the longer term due to their overall low score. Similarly, although Instant Messaging has no gap and is scored high indicating that there is no urgency to develop this area in the immediate future, CAMFEBA may want to continue keeping up with trends in this area as any further improvements will have a larger impact on the organisation.

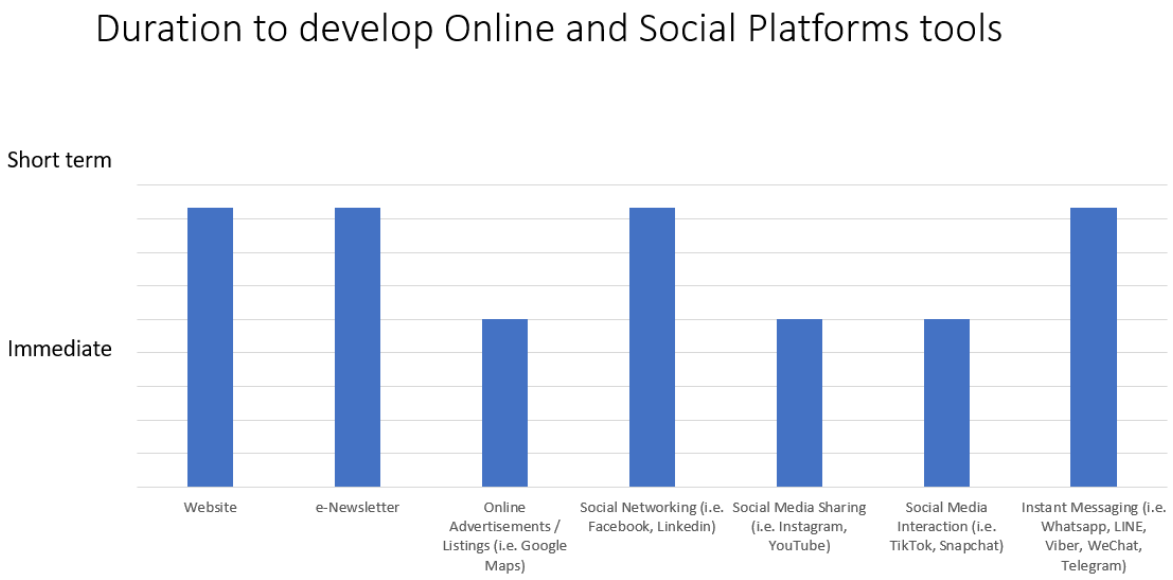


Diagram 41. Duration to develop Online and Social Platform tools at CAMFEBA.

The low scores in *Diagram 41* indicate higher priority to CAMFEBA to develop Online and Social Platforms tools and high scores indicate a lower priority to develop Online and Social Platforms tools. For instance, Online Advertisements/Listings, Social Media Sharing and Social Media Interaction are scored the lowest indicating that the development of these modes of Online and Social Platforms are considered CAMFEBA's highest priority. Similarly, Website, e-Newsletter, Social Networking, and Instant Messaging are scored the highest and therefore considered to be CAMFEBA's lowest priority in terms of developing Online and Social Platforms tools.

Corresponding to *Diagram 40*, it can be deduced that CAMFEBA aims to develop online and social platforms with low scores overall. This is reflected in the level of urgency to develop Online Advertisements/Listings, Social Media Sharing and Social Media Interaction in *Diagram 41* in comparison to other online and social platform tools that are relatively higher in importance in *Diagram 40*.

.

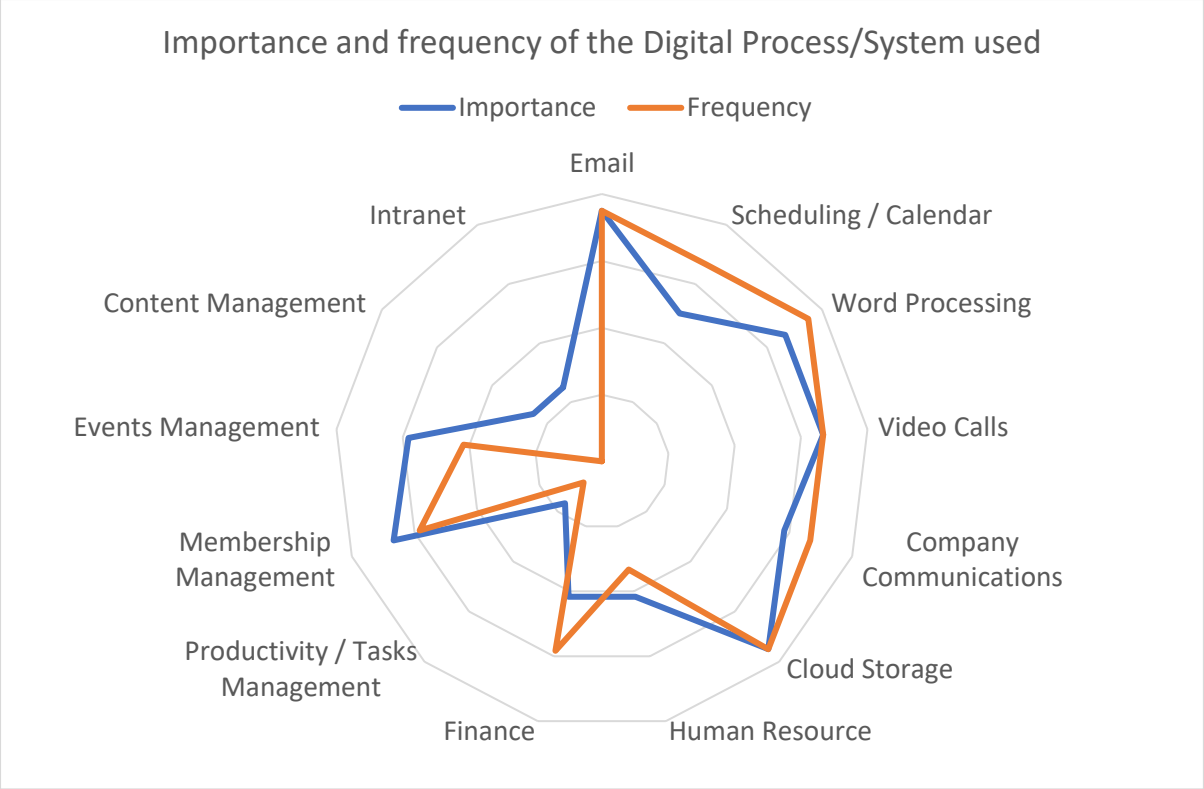


Diagram 42. Importance and Frequency of the Digital Process/System used at CAMFEBA.

For CAMFEBA's Digital Processes/Systems, a few gaps can be identified between the Digital Processes/Systems importance and frequency in *Diagram 42*. For instance, there is a gap between the importance and frequency of Human Resource, Productivity/Tasks Management, Membership Management, Events Management, Content Management, and Intranet where the importance of these Digital Processes/Systems is higher than their frequency. This suggests that CAMFEBA can look into further developing these Digital Processes/Systems to fully utilise them. Similarly, there is also a gap between the importance and frequency of Scheduling/Calendar, Word Processing, Company Communications, and Finance where the frequency of these Digital Processes/Systems is higher than their importance. This suggests that CAMFEBA may be spending too much time and effort on these Digital Processes/Systems.

Although Email, Video Calls, and Cloud Storage have no gaps and are scored high indicating that there is no urgency to develop these areas in the immediate future, CAMFEBA may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

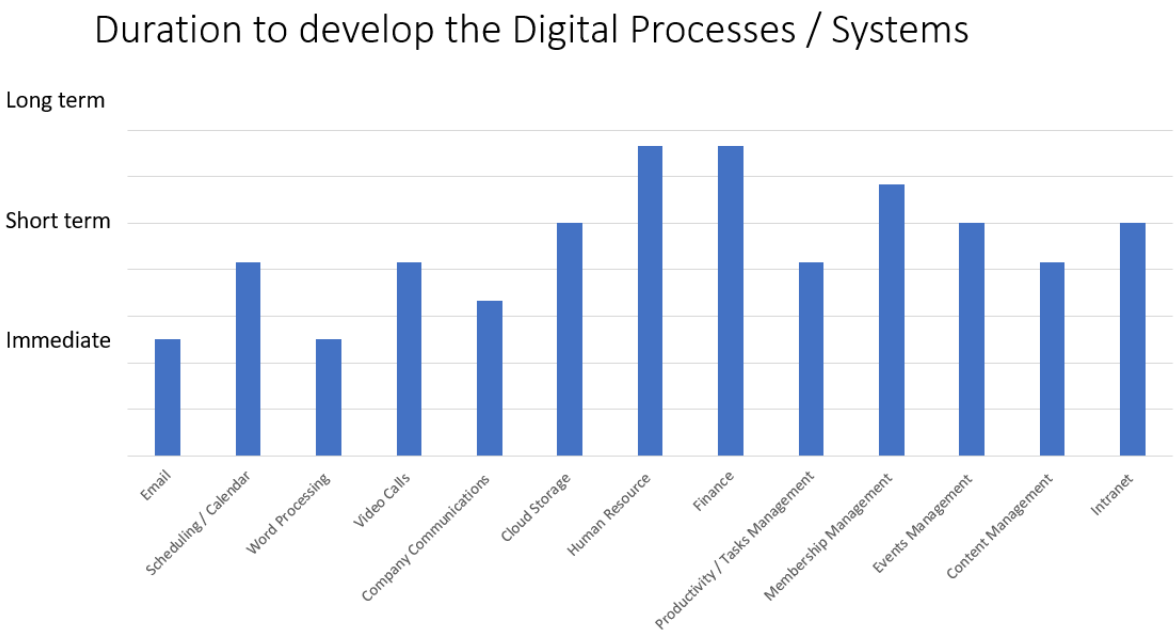


Diagram 43. Duration to develop Digital Processes/Systems at CAMFEBA.

The low scores in *Diagram 43* indicate higher priority to CAMFEBA to develop Digital Processes/Systems and high scores indicate a lower priority to develop Digital Processes/Systems. For instance, Email and Word Processing are scored the lowest indicating that the development of this Digital Process/System is considered CAMFEBA's highest priority. Similarly, Human resource and Finance are scored the highest and therefore considered to be CAMFEBA's lowest priority in terms of developing Digital Processes/Systems.

Corresponding to *Diagram 42*, it can be deduced that the importance and frequency of the mode of Digital Processes/Systems impacts the level of urgency more than the gap areas. For instance, Email and Word Processing are scored highly in terms of importance and frequency in *Diagram 42* and are considered to be the most urgent matters to address in *Diagram 43*. Similarly, Human Resource and Finance scored relatively low in terms of importance and frequency in *Diagram 42* and are considered to be the least urgent matters to develop in *Diagram 43.* However, to promote growth and competitiveness of CAMFEBA, gap areas may want to be considered for development as well to improve CAMFEBA's digital capabilities.

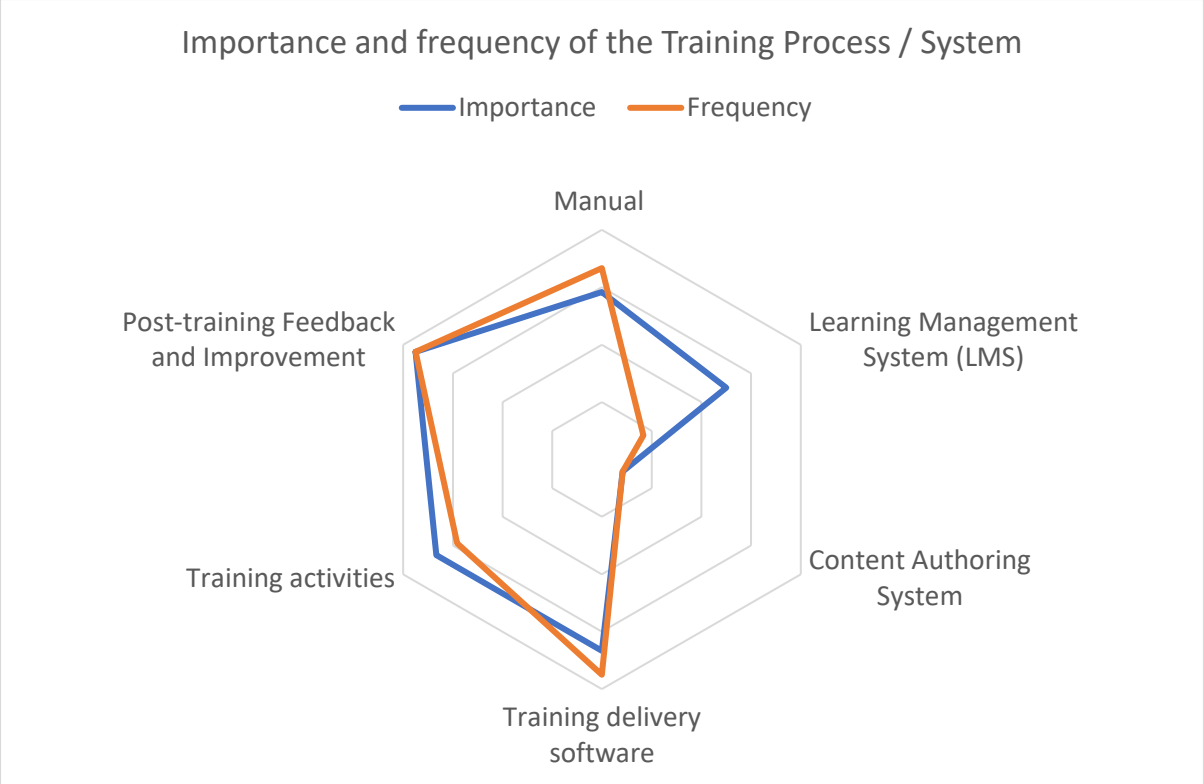


Diagram 44. Importance and Frequency of the Training Process/System used at CAMFEBA.

For CAMFEBA's Training Processes/Systems, a few gaps can be identified between the mode's importance and frequency in *Diagram 44*. For instance, there is a gap between the importance and frequency of LMS and Training activities where the importance of these Training Processes/Systems is higher than their frequency. This suggests that CAMFEBA can look into further developing these Training Processes/Systems to fully utilise them. Similarly, there is also a gap between the importance and frequency of Manual and Training delivery software where the frequency of these Training Processes/Systems is higher than their importance. This suggests that CAMFEBA may be spending too much time and effort on these Training Processes/Systems.

Overall, the Training Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, CAMFEBA can consider developing the Training Processes/Systems with relatively low scores such as Content Authoring System in the longer term. Similarly, although Post-training Feedback and Improvement has no gap and is scored relatively high, indicating that there is no urgency to develop these areas in the immediate future, CAMFEBA may want to continue keeping up with trends in this area as any further improvements will have a relatively large impact on the organisation.

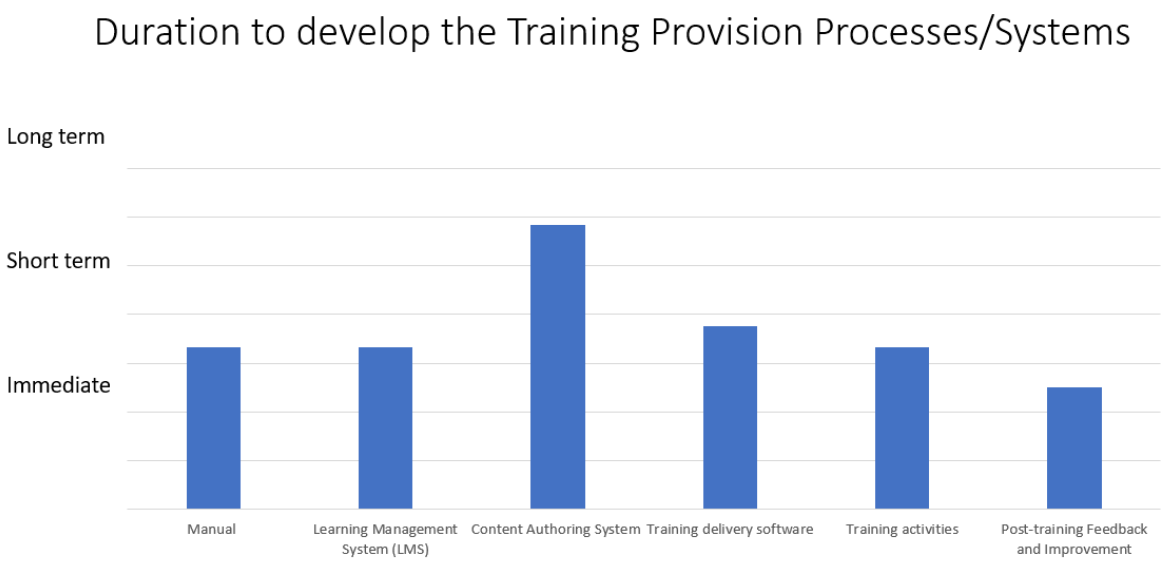


Diagram 45. Duration to develop Training Processes/Systems at CAMFEBA.

To begin, the low scores in *Diagram 45* indicate higher priority to CAMFEBA to develop Training Processes/Systems and high scores indicate a lower priority to develop Training Processes/Systems. For instance, Post-training Feedback and Improvement scored the lowest indicating that the development of this Training Process/System is considered CAMFEBA's highest priority. Similarly, Content Authoring System scored the highest and is therefore considered to be CAMFEBA's lowest priority in terms of developing Training Processes/Systems.

Corresponding to *Diagram 44*, it can be deduced that the importance of the Training Processes/Systems impacts the level of urgency more than the gap areas. For instance, Post-training Feedback and Improvement highly in terms of importance whereas Content Authoring System scored the lowest in terms of importance in *Diagram 44*. However, to promote growth and competitiveness of CAMFEBA, gap areas may want to be considered for development as well to improve CAMFEBA's digital capabilities.

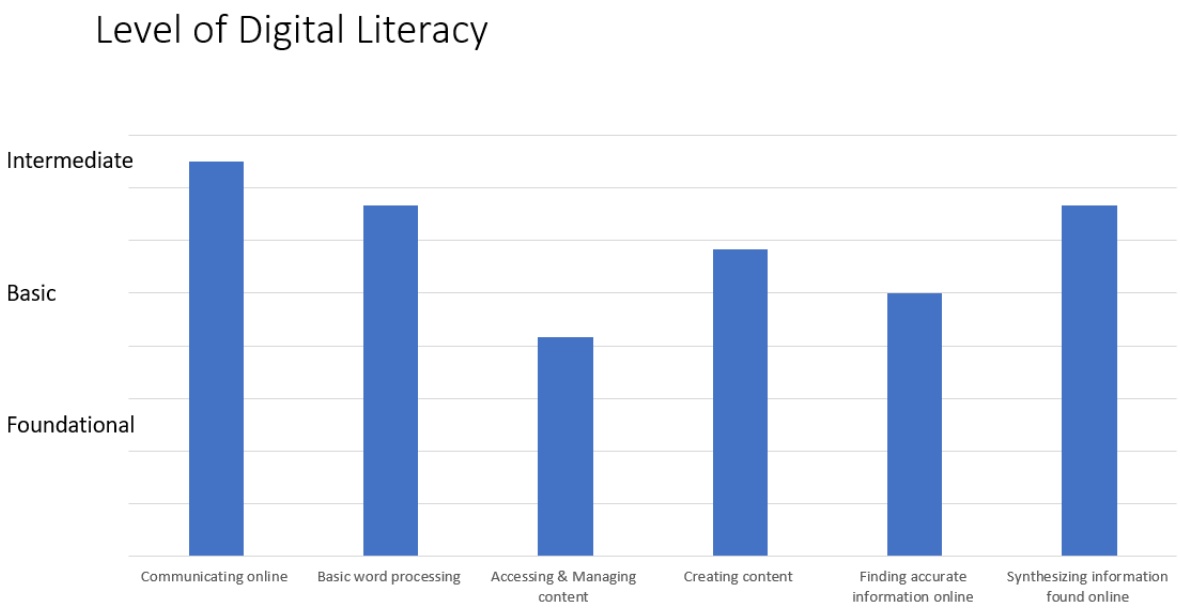


Diagram 46. Level of Digital Literacy at CAMFEBA.

For CAMFEBA's Staff Digital Literacy rates, *Diagram 46* indicates that the higher scores indicate higher levels of digital literacy and vice versa. For instance, communicating online, basic word processing, and synthesizing information found online represent the highest scores indicated by *Diagram 46*. Similarly, accessing & managing content and finding accurate information online indicate lower digital literacy skills at CAMFEBA. Overall, CAMFEBA portrays a range of digital literacy skills between foundational to intermediate skills.

Philippines – Employers Confederation Of The Philippines (ECOP)

Diagram 47. Importance and Frequency of the mode of Engagement at ECOP.

For ECOP's mode of engagement, a few gaps can be identified between the mode's importance and frequency in *Diagram 47*. For instance, there is a gap between the importance and frequency of Informal Communications, Community Content Creation, Community Content Contribution, Community Participation, Events, Exclusive Member Benefits and Feedback where the importance of these modes is higher than their frequency. This suggests that ECOP can look into further developing these modes to fully utilise them.

Although Official Communications and Training and Workshops have no gaps and are scored high indicating that there is no urgency to develop these areas in the immediate future, ECOP may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

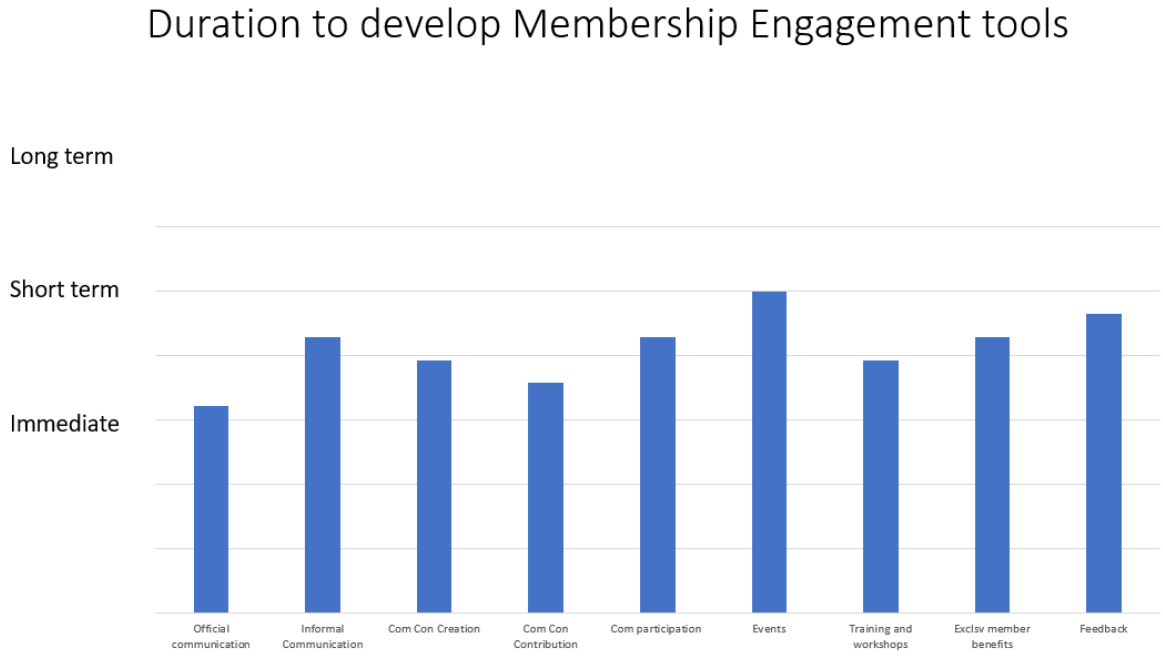


Diagram 48. Duration to develop Membership Engagement tools at ECOP.

To begin, the low scores in *Diagram 48* indicate higher priority to ECOP to develop Membership Engagement tools and high scores indicate a lower priority to develop Membership Engagement tools. For instance, Events and Feedback scored the lowest indicating that the development of these modes of engagement are considered ECOP's highest priority. Similarly, Official Conmmunications, and Community Content Contribution scored the highest and therefore considered to be ECOP's lowest priority in terms of developing membership engagement tools.

In *Diagram 47*, all modes of engagement at ECOP are scored highly in terms of importance where there are gaps due to the relatively lower frequency scores. Similarly, *Diagram 48* reflects ECOP's aim to address and develop all Membership Engagement tools between 3 months to 1 year. Hence, to promote growth and competitiveness of ECOP's, gap areas from *Diagram 47* may want to be considered for development as well to improve ECOP's digital capabilities.

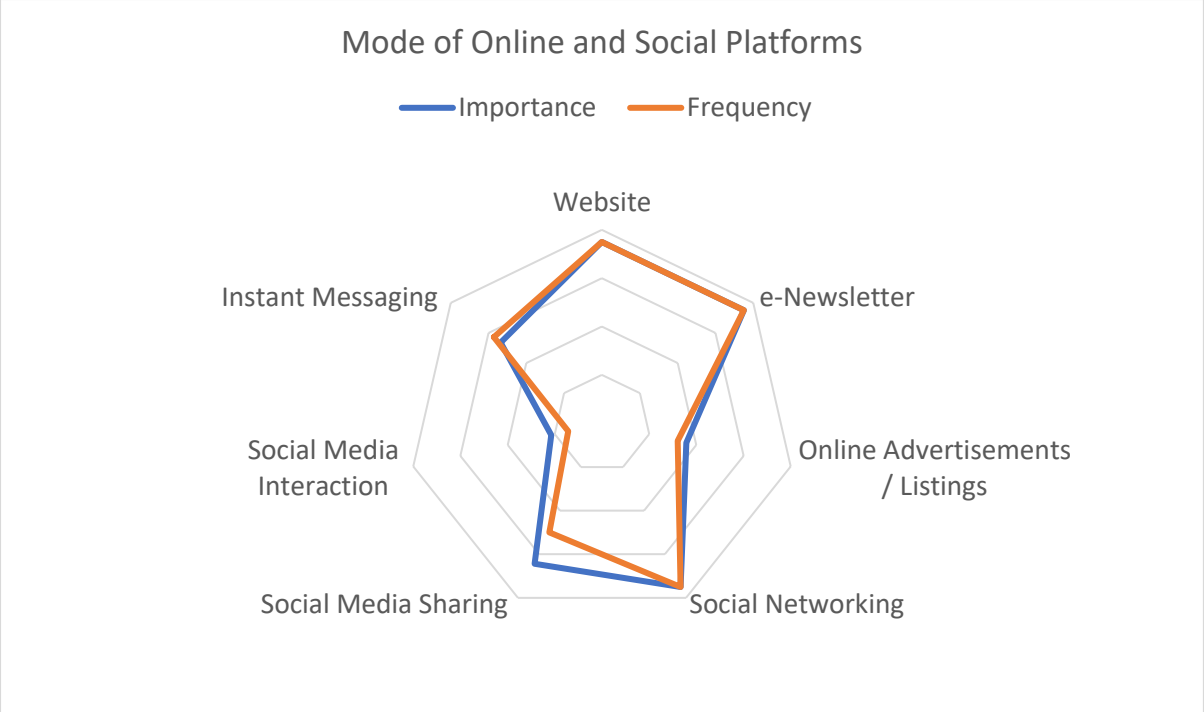


Diagram 49. Importance and Frequency of the mode of Online and Social Platforms at ECOP.

For ECOP's mode of online and social platforms, a few gaps can be identified between the mode's importance and frequency in *Diagram 49*. For instance, there is a gap between the importance and frequency of Online Advertisements/Listings, Social Media Sharing, and Social Media Interaction where the importance of this mode is higher than its frequency. This suggests that ECOP can look into further developing these modes to fully utilise them. Similarly, there is also a gap between the importance and frequency of Instant Messaging where the frequency of this mode of online and social platforms is higher than its importance. This suggests that ECOP may be spending too much time and effort on these modes of online and social platforms.

Although Website and e-Newsletter have no gaps and are scored highly indicating that there is no urgency to develop these areas in the immediate future, ECOP may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

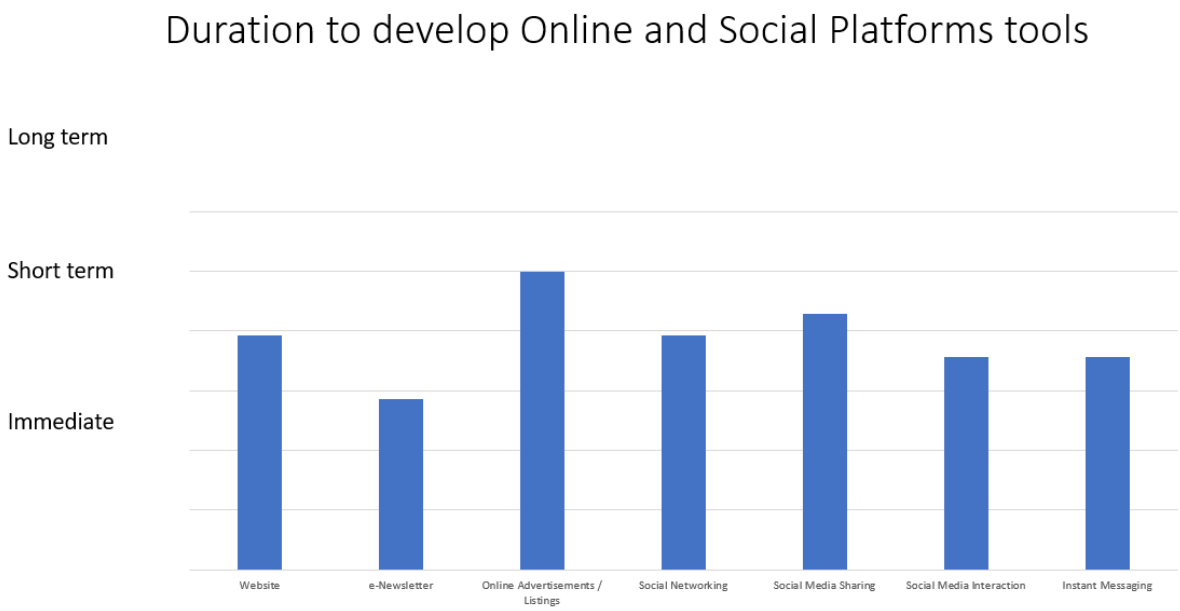


Diagram 50. Duration to develop Online and Social Platform tools at ECOP.

The low scores in *Diagram 50* indicate higher priority to ECOP to develop Online and Social Platforms tools and high scores indicate a lower priority to develop Online and Social Platforms tools. For instance, e-Newsletter scored the lowest indicating that the development of this mode of Online and Social Platforms is considered ECOP's highest priority. Similarly, Online Advertisements/Listings scored the highest and is therefore considered to be ECOP's lowest priority in terms of developing Online and Social Platforms tools.

Corresponding to *Diagram 49*, it can be deduced that the importance and frequency of the mode of Online and Social Platforms impacts the level of urgency more than the gap areas. For instance, e-Newsletter scored lowest in *Diagram 50* and is associated with high levels of importance and frequency in *Diagram 49*; while Online Advertisements/Listings scored highest in *Diagram 50* and is associated with low levels of importance and frequency in *Diagram 49.* However, there is little correspondence overall to the gap areas from *Diagram 49* when comparing Social Media Sharing and Social Media Interaction in *Diagram 50*.

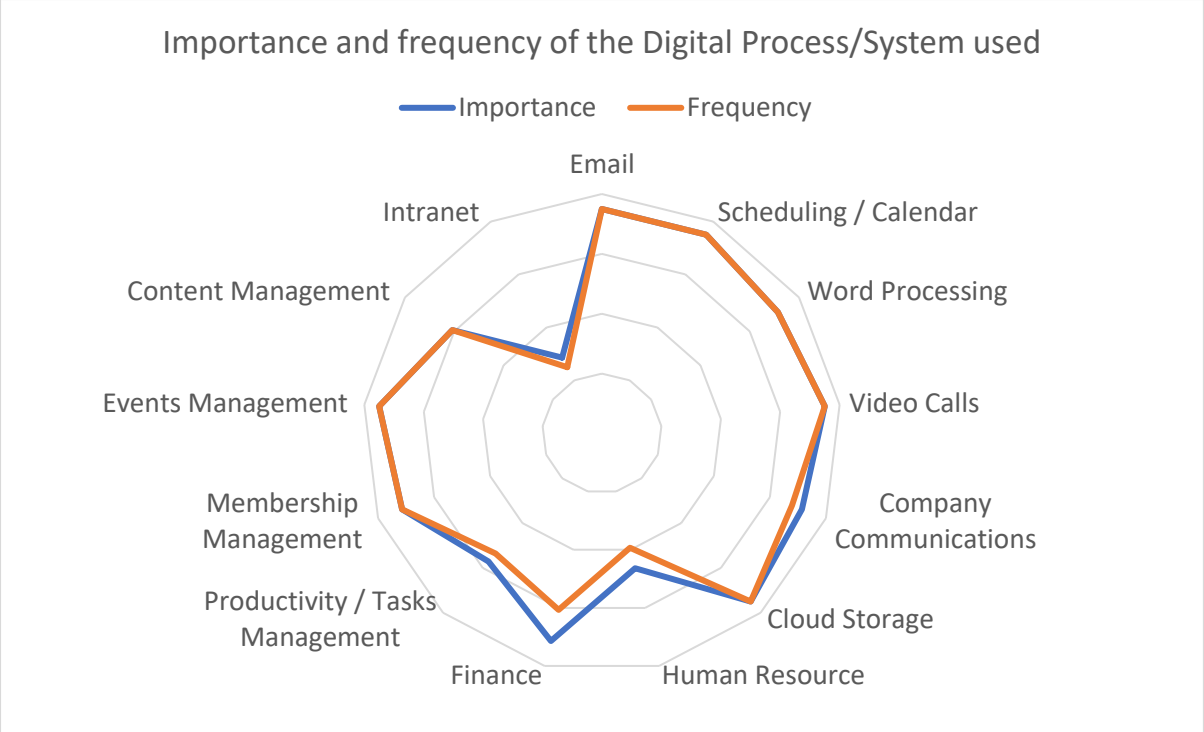


Diagram 51. Importance and Frequency of the Digital Process/System used at ECOP.

For ECOP's Digital Processes/Systems, a few gaps can be identified between the mode's importance and frequency in *Diagram 51*. For instance, there is a gap between the importance and frequency of Human Resource, Finance, Productivity/Tasks Management, and Intranet where the importance of these Digital Processes/Systems is higher than their frequency. This suggests that ECOP can look into further developing these Digital Processes/Systems to fully utilise them.

Although Email, Scheduling/Calendar, Word Processing, Video Calls, Cloud Storage, Membership Management, Events Management, and Content Management have no gaps and are scored relatively high indicating that there is no urgency to develop these Digital Processes/Systems in the immediate future, ECOP may want to continue keeping up with trends in these Digital Processes/Systems as any further improvements will have a larger impact on the organisation.

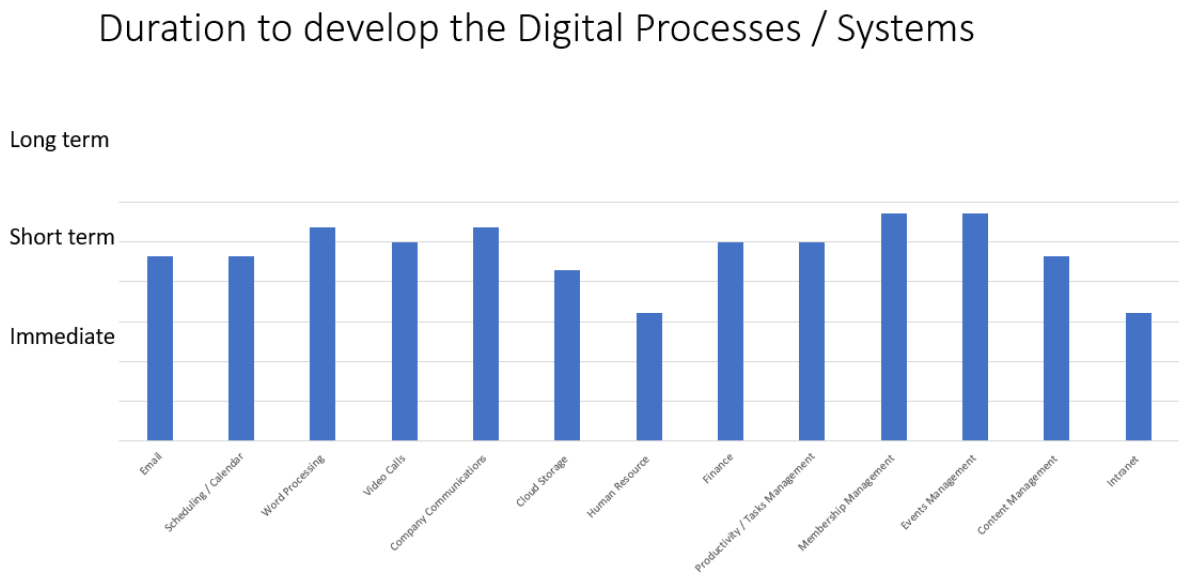


Diagram 52. Duration to develop Digital Processes/Systems at ECOP.

The low scores in *Diagram 52* indicate higher priority to ECOP to develop Digital Processes/Systems and high scores indicate a lower priority to develop Digital Processes/Systems. For instance, Human Resource and Intranet scored the lowest indicating that the development of this Digital Process/System is considered ECOP's highest priority. Similarly, Membership Management and Events Management scored the highest and therefore considered to be ECOP's lowest priority in terms of developing Digital Processes/Systems.

Corresponding to *Diagram 51*, it can be deduced that ECOP aims to develop the mode of Digital Processes/Systems with low scores overall. This is reflected in the level of urgency to develop Human Resource and Intranet in *Diagram 52* in comparison to other online and social platform tools that are relatively higher in importance and frequency in *Diagram 51*.

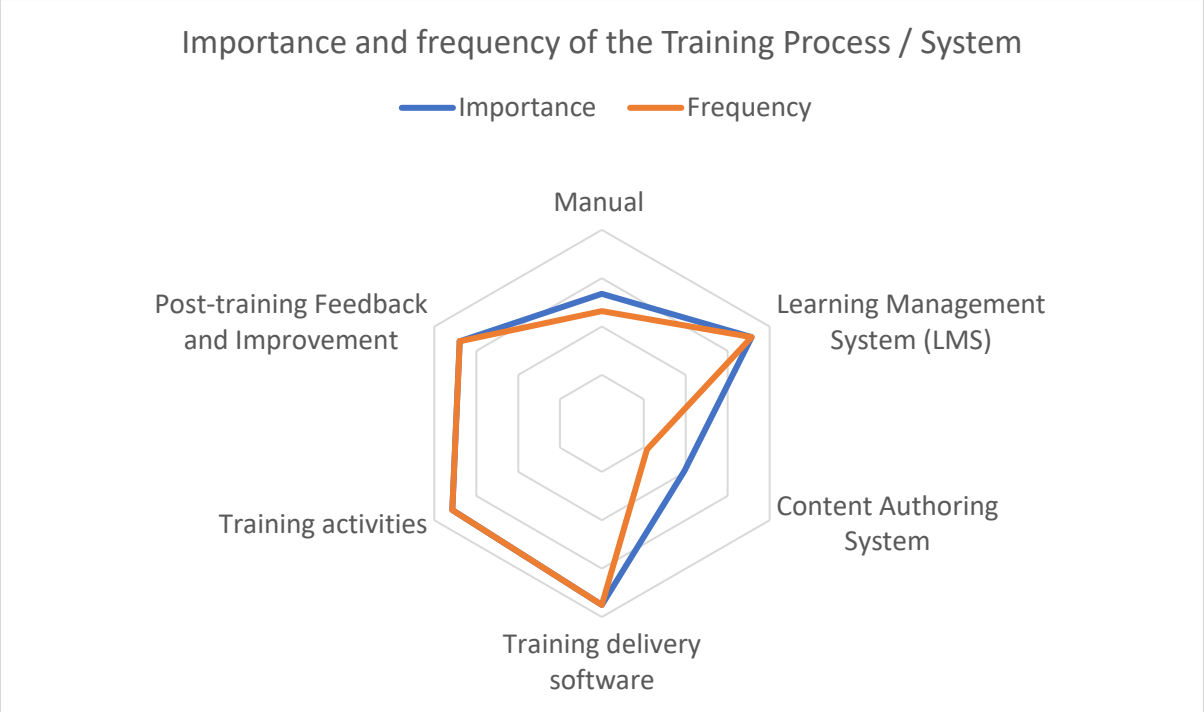


Diagram 53. Importance and Frequency of the Training Process/System used at ECOP.

For ECOP's Training Processes/Systems, a few gaps can be identified between the mode's importance and frequency in *Diagram 53*. For instance, there is a gap between the importance and frequency of Manual and Content Authoring System where the importance of these Training Processes/Systems is higher than their frequency. This suggests that ECOP can look into further developing these Training Processes/Systems to fully utilise them.

Although LMS, Training delivery software, Training activities, and Post-training Feedback and Improvement has no gap and is scored relatively high, indicating that there is no urgency to develop these areas in the immediate future, ECOP may want to continue keeping up with trends in this area as any further improvements will have a relatively large impact on the organisation.

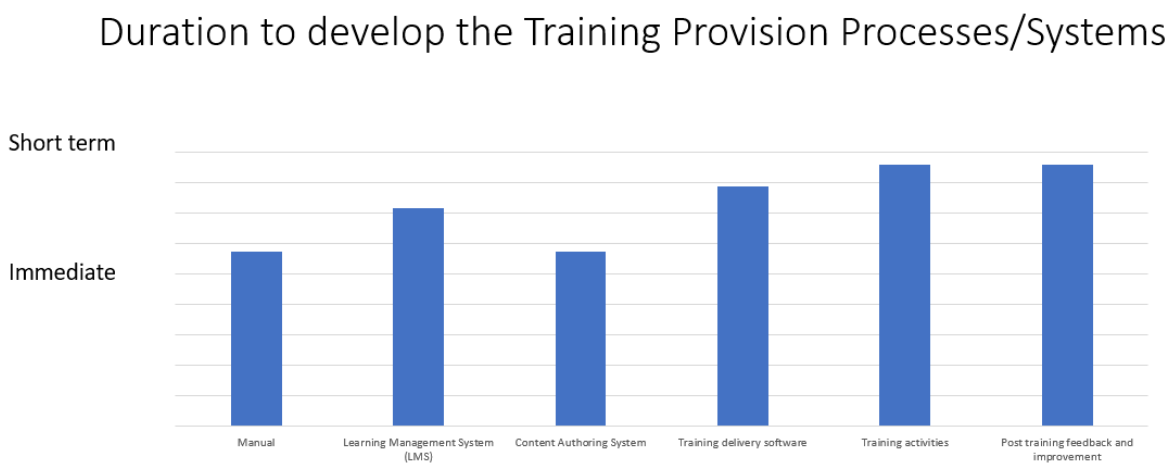


Diagram 54. Duration to develop Training Processes/Systems at ECOP.

The low scores in *Diagram 54* indicate higher priority to ECOP to develop Training Processes/Systems and high scores indicate a lower priority to develop Training Processes/Systems. For instance, Manual and Content Authoring System scored the lowest indicating that the development of these Training Processes/Systems is considered ECOP's highest priority. Similarly, Training activities and Post-training Feedback and Improvement scored the highest and therefore considered to be ECOP's lowest priority in terms of developing Training Processes/Systems.

In *Diagram 53*, it can be deduced that ECOP aims address the gap areas as *Diagram 54* portrays the correspondence of the level of urgency with the gap areas identified from *Diagram 53.*

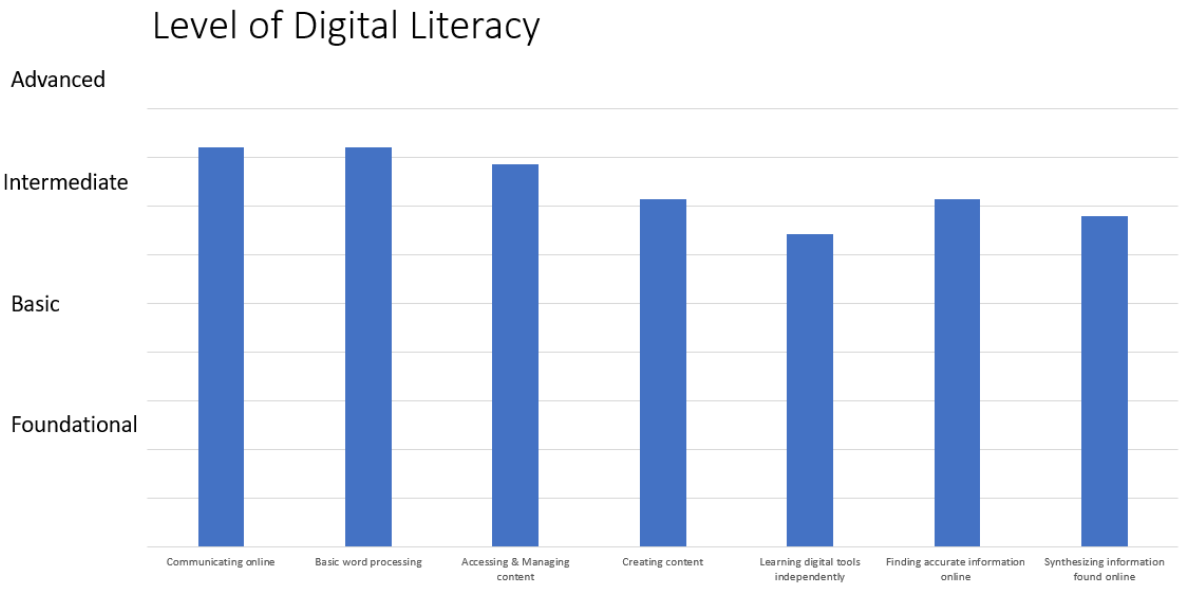


Diagram 55. Level of Digital Literacy at ECOP.

For ECOP's Staff Digital Literacy rates, *Diagram 55* indicates that the higher scores indicate higher levels of digital literacy and vice versa. For instance, communicating online, basic word processing, and accessing & managing content represent the highest scores indicated by *Diagram 55*. Similarly, learning digital tools independently and synthesizing information found online indicate lower digital literacy skills at ECOP. Overall, ECOP portrays a range of digital literacy skills past basic skills and approaching advanced skills.

Thailand – Employers' Confederation of Thailand (ECOT)

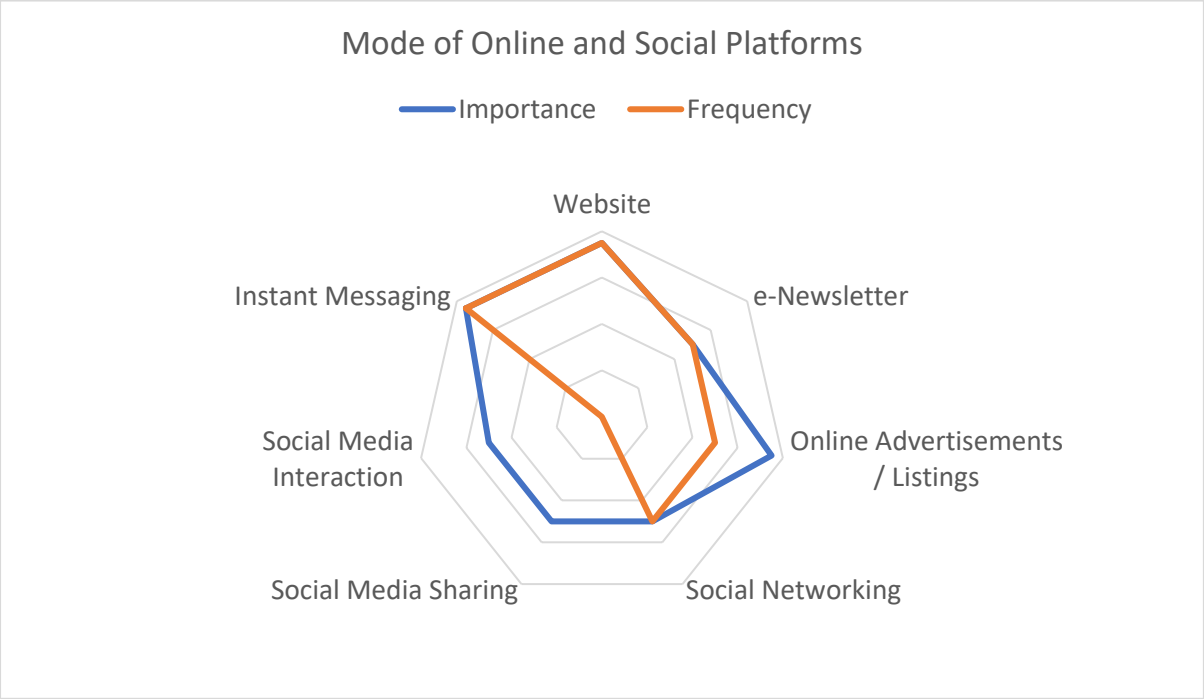


Diagram 56. Importance and Frequency of the mode of Online and Social Platforms at ECOT.

For ECOT's mode of online and social platforms, a few gaps can be identified between the mode's importance and frequency in *Diagram 56*. For instance, there is a gap between the importance and frequency of Online Advertisements/Listings, Social Media Sharing, and Social Media Interaction where the importance of this mode is higher than its frequency. This suggests that ECOT can look into further developing these modes to fully utilise them.

Although Website, e-Newsletter, Social Networking, and Instant Messaging have no gaps and are scored highly indicating that there is no urgency to develop these areas in the immediate future, ECOT may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

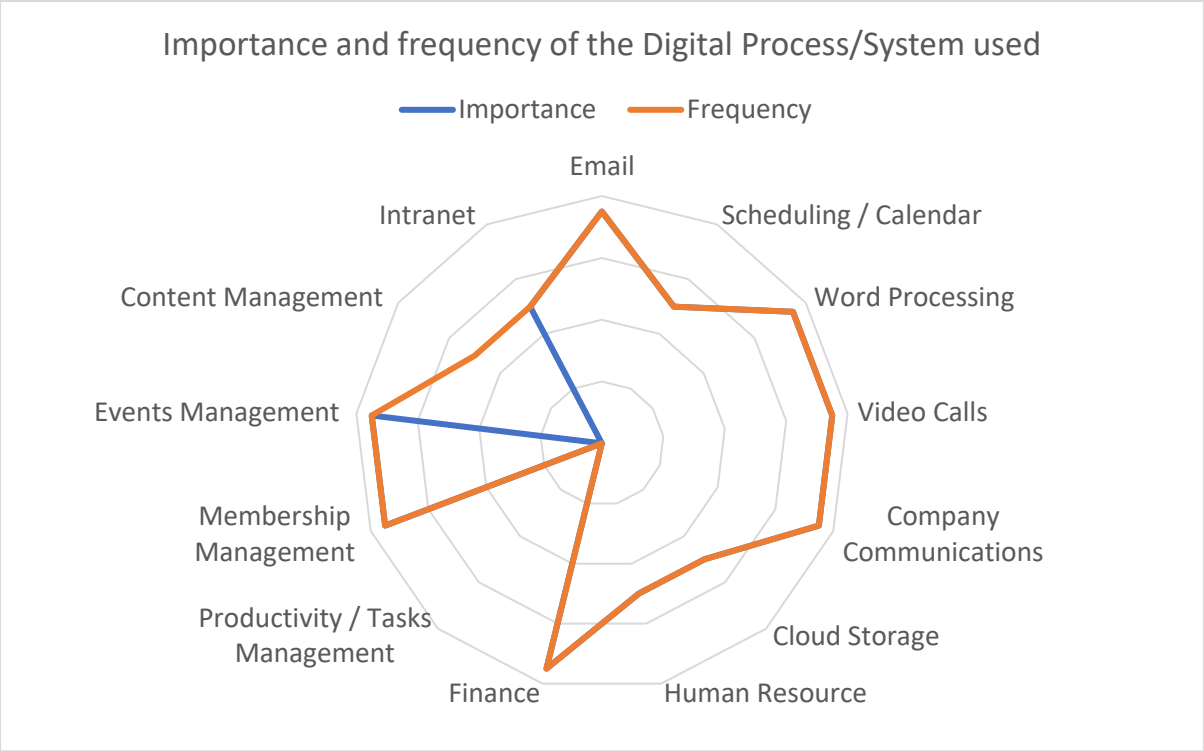


Diagram 57. Importance and Frequency of the Digital Process/System used at ECOT.

For ECOT's Digital Processes/Systems, a few gaps can be identified between the Digital Processes/Systems importance and frequency in *Diagram 57*. For instance, there is a gap between the importance and frequency of Content Management where the frequency of these Digital Processes/Systems is higher than their importance. This suggests that ECOT may be spending too much time and effort on these Digital Processes/Systems.

The Digital Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, ECOT can consider developing the Digital Processes/Systems with relatively low scores such as Productivity/Tasks Management in the longer term. Similarly, although Emails, Word Processing, Video Calls, Company Communications, Finance, Membership Management, and Events Management have no gaps and are scored high indicating that there is no urgency to develop these Digital Processes/Systems in the immediate future, ECOT may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

For the other 3 dimensions of the survey- Member Engagement, Training Provision and Digital Literacy- the Importance X Frequency diagrams all tend to have the highest scores for all the different modes. Similarly, the duration to develop tools are all set to be developed in the long-term and the level of digital literacy are all set as intermediate. As scores tend to be very uniform, it is uncertain whether it is an accurate reflection of the state of ECOT.

Laos – Lao National Chamber of Commerce and Industry (LNCCI)

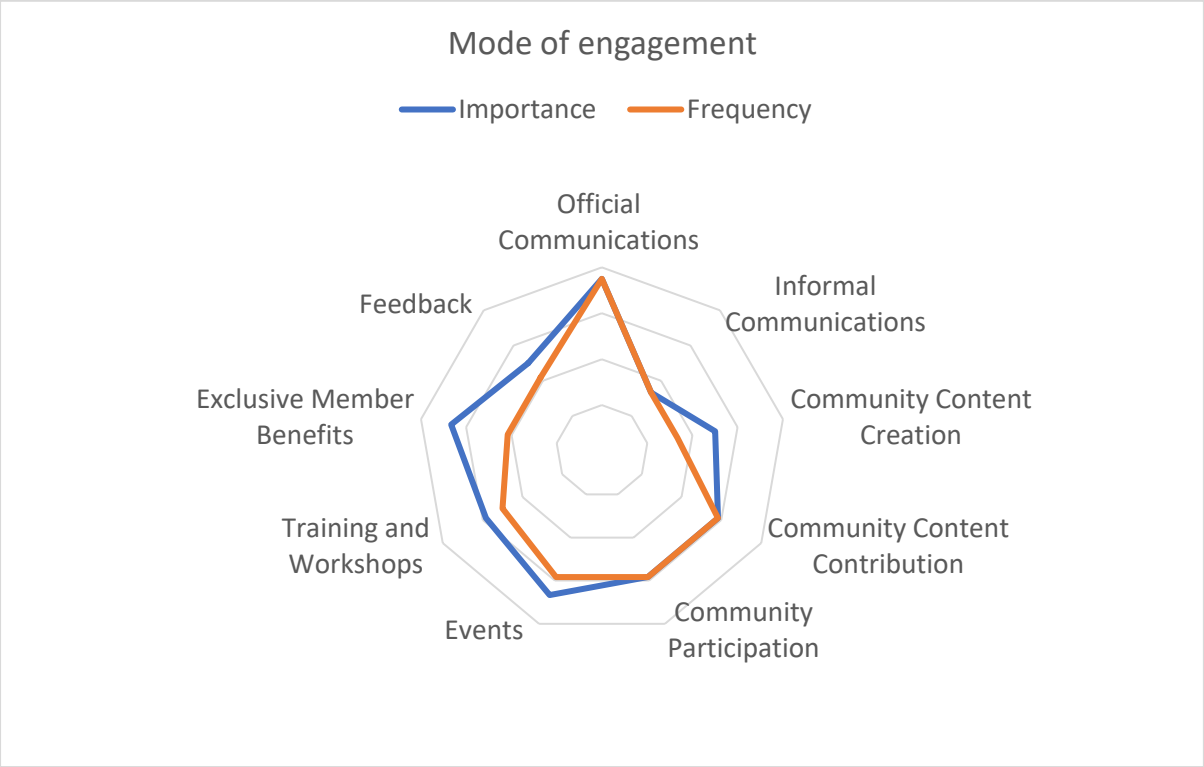


Diagram 58. Importance and Frequency of the mode of Engagement at LNCCI.

For LNCCI's mode of engagement, a few gaps can be identified between the mode's importance and frequency in *Diagram 58*. For instance, there is a gap between the importance and frequency of Community Content Creation, Events, Training and Workshops, Exclusive Member Benefits, and Feedback where the importance of these modes is higher than their frequency. This suggests that LNCCI can look into further developing these modes to fully utilise them.

The modes of engagement where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, LNCCI can consider developing the modes of engagement with relatively low scores such as Informal Communications in the longer term. Similarly, although Official Communications, Community Content Contribution, and Community Participation have no gaps and are scored high indicating that there is no urgency to develop these areas in the immediate future, LNCCI may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

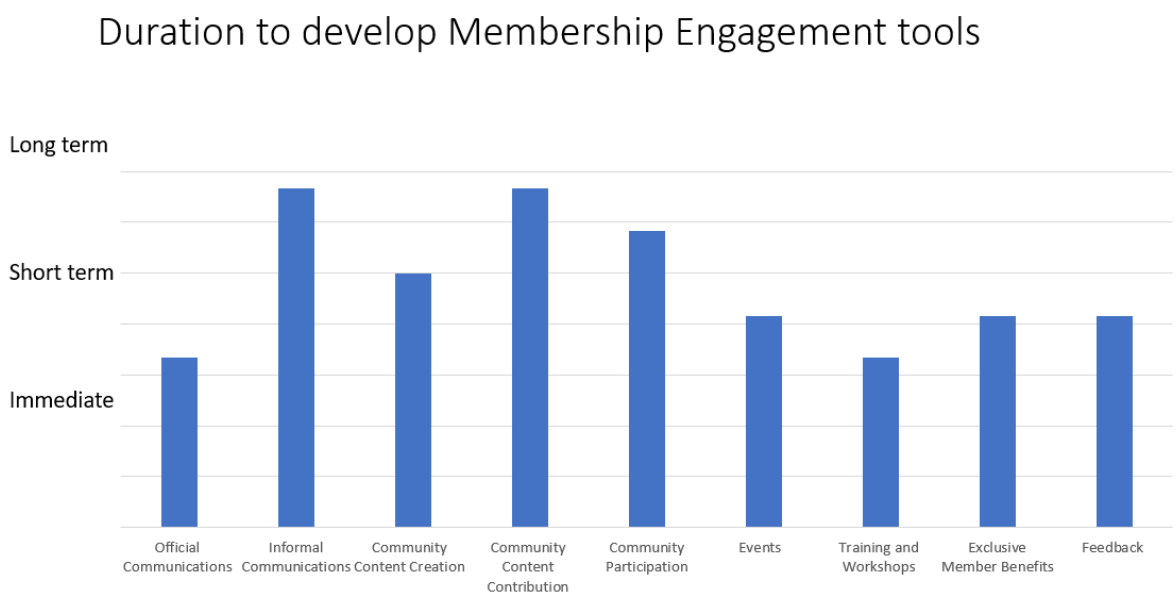


Diagram 59. Duration to develop Membership Engagement tools at LNCCI.

The low scores in *Diagram 59* indicate higher priority to LNCCI to develop Membership Engagement tools and high scores indicate a lower priority to develop Membership Engagement tools. For instance, Offical Communications as well as Training and Workshops are scored the lowest indicating that the development of these modes of engagement are considered LNCCI's highest priority. Similarly, Informal Communications and Community Content Contribution are scored the highest and therefore considered to be LNCCI's lowest priority in terms of developing membership engagement tools.

Corresponding to *Diagram 58*, it can be deduced that the importance of the mode of engagement impacts the level of urgency more than the gap areas. For instance, both Official Communications scored highly in terms of importance and frequency whereas Informal Communications scored lowest in terms of importance in *Diagram 58*. Similarly, there is little correlation between the size of the gap areas from *Diagram 58* and its correspondence of the level of urgency in *Diagram 59*. Hence, to promote growth and competitiveness of LNCCI's, gap areas may want to be considered for development as well to improve LNCCI's digital capabilities.

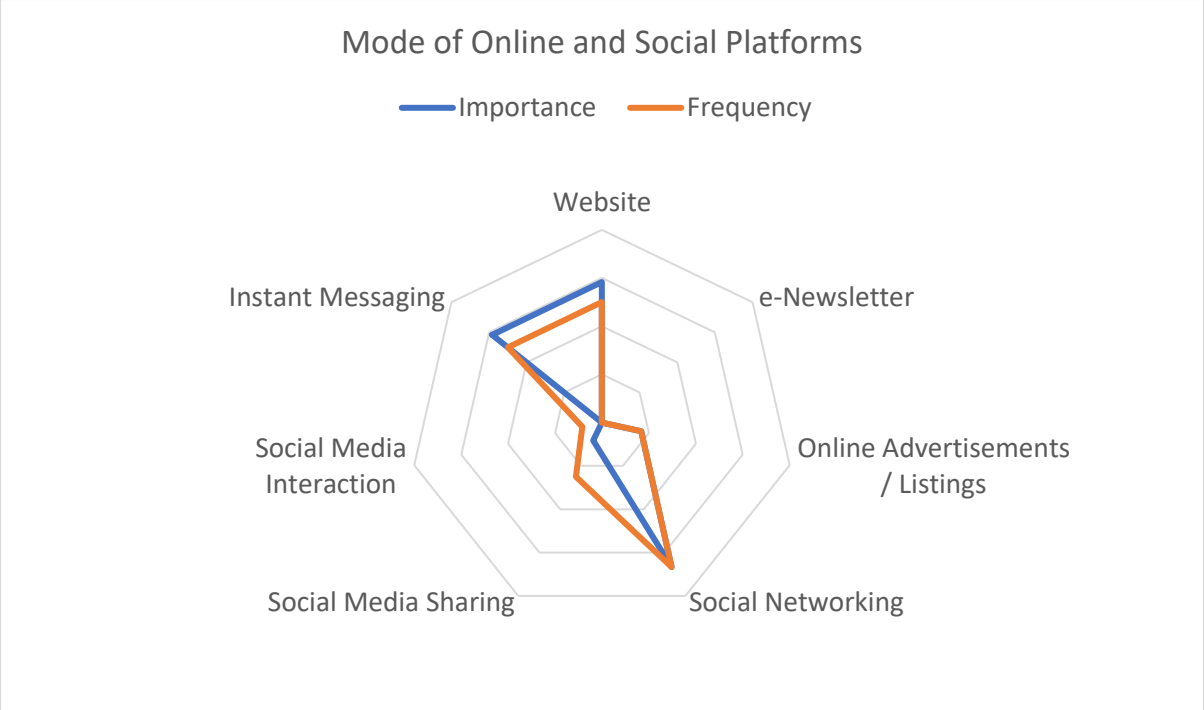


Diagram 60. Importance and Frequency of the mode of Online and Social Platforms at LNCCI.

For LNCCI's mode of online and social platforms, a few gaps can be identified between the mode's importance and frequency in *Diagram 60*. For instance, there is a gap between the importance and frequency of Website and Instant Messaging where the importance of these modes of online and social platforms is higher than their frequency. This suggests that LNCCI can look into further developing these modes to fully utilise them. Similarly, there is also a gap between the importance and frequency of Social Media Sharing and Social Media Interaction where the frequency of these modes of online and social platforms is higher than their importance. This suggests that LNCCI may be spending too much time and effort on these modes of online and social platforms.

Although the modes of engagement where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage, LNCCI can consider developing e-Newsletter and Online Advertisements/Listings in the longer term due to their overall low score. Similarly, although Social Networking has no gap and is scored high indicating that there is no urgency to develop this area in the immediate future, LNCCI may want to continue keeping up with trends in this area as any further improvements will have a larger impact on the organisation.

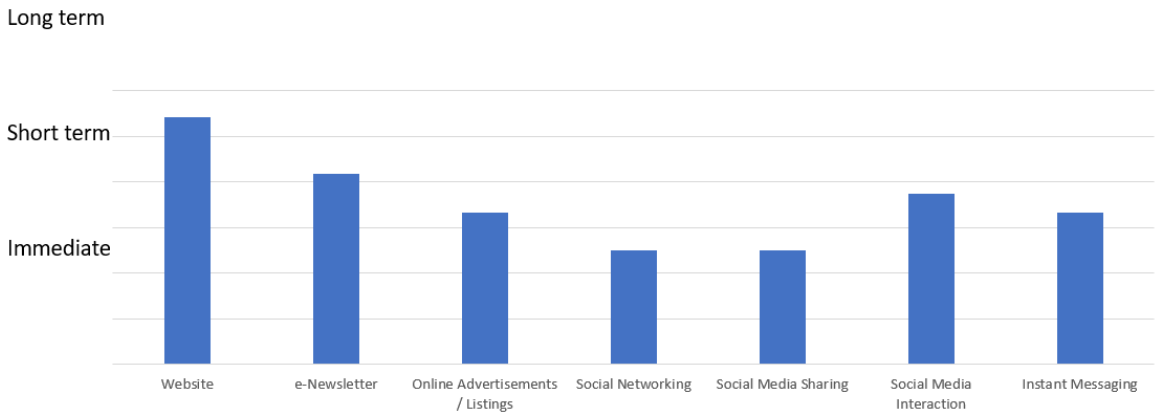


Diagram 61. Duration to develop Online and Social Platform tools at LNCCI.

The low scores in *Diagram 61* indicate higher priority to LNCCI to develop Online and Social Platforms tools and high scores indicate a lower priority to develop Online and Social Platforms tools. For instance, Social Networking and Social Media Sharing scored the lowest indicating that the development of these modes of Online and Social Platforms are considered LNCCI's highest priority. Similarly, Website and e-Newsletter scored the highest and therefore considered to be LNCCI's lowest priority in terms of developing Online and Social Platforms tools.

.

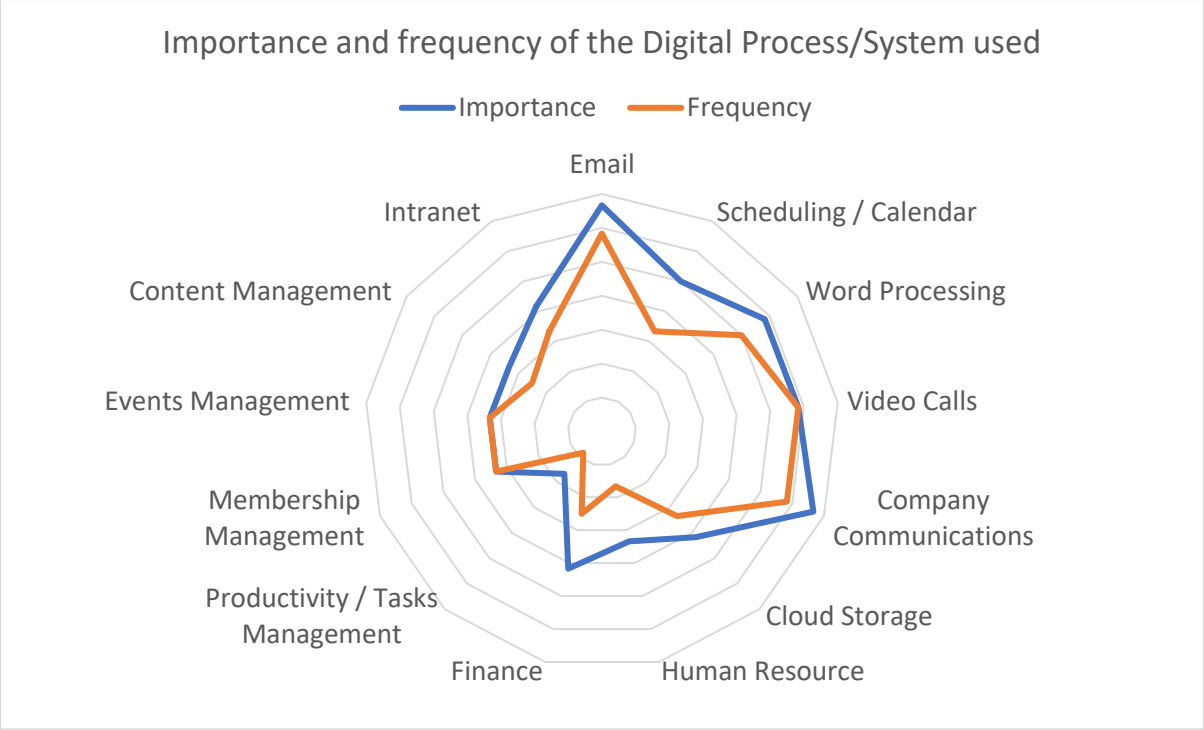


Diagram 62. Importance and Frequency of the Digital Process/System used at LNCCI.

For LNCCI's Digital Processes/Systems, a few gaps can be identified between the mode's importance and frequency in *Diagram 62*. For instance, there is a gap between the importance and frequency of Email, Scheduling/Calendar, Company Communications, Cloud Storage, Human Resource, Finance, Productivity/Tasks Management, Content Management, and Intranet where the importance of these Digital Processes/Systems is higher than their frequency. This suggests that LNCCI can look into further developing these Digital Processes/Systems to fully utilise them.

The Digital Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, LNCCI can consider developing the Digital Processes/Systems with relatively low scores such as Video Calls in the longer term. Similarly, although Membership Management and Events Management have no gaps and scored high indicating that there is no urgency to develop these Digital Processes/Systems in the immediate future, LNCCI may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

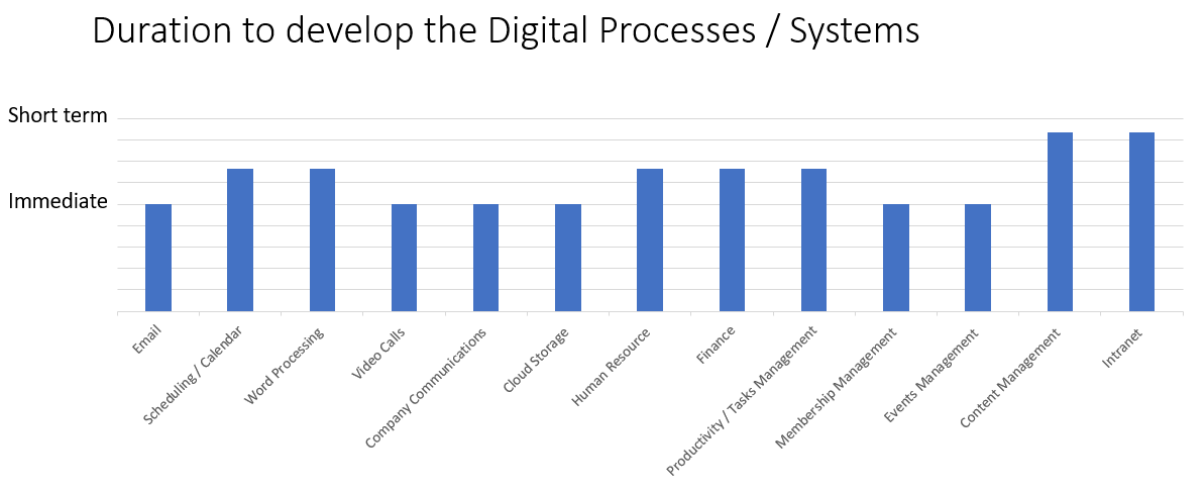


Diagram 63. Duration to develop Digital Processes/Systems at LNCCI.

The low scores in *Diagram 63* indicate higher priority to LNCCI to develop Digital Processes/Systems and high scores indicate a lower priority to develop Digital Processes/Systems. For instance, Email, Video Calls, Company Communications, Cloud Storage, Membership Management, and Events Management scored the lowest indicating that the development of this Digital Process/System is considered LNCCI's highest priority. Similarly, Content Management and Intranet scored the highest and therefore considered to be LNCCI's lowest priority in terms of developing Digital Processes/Systems.

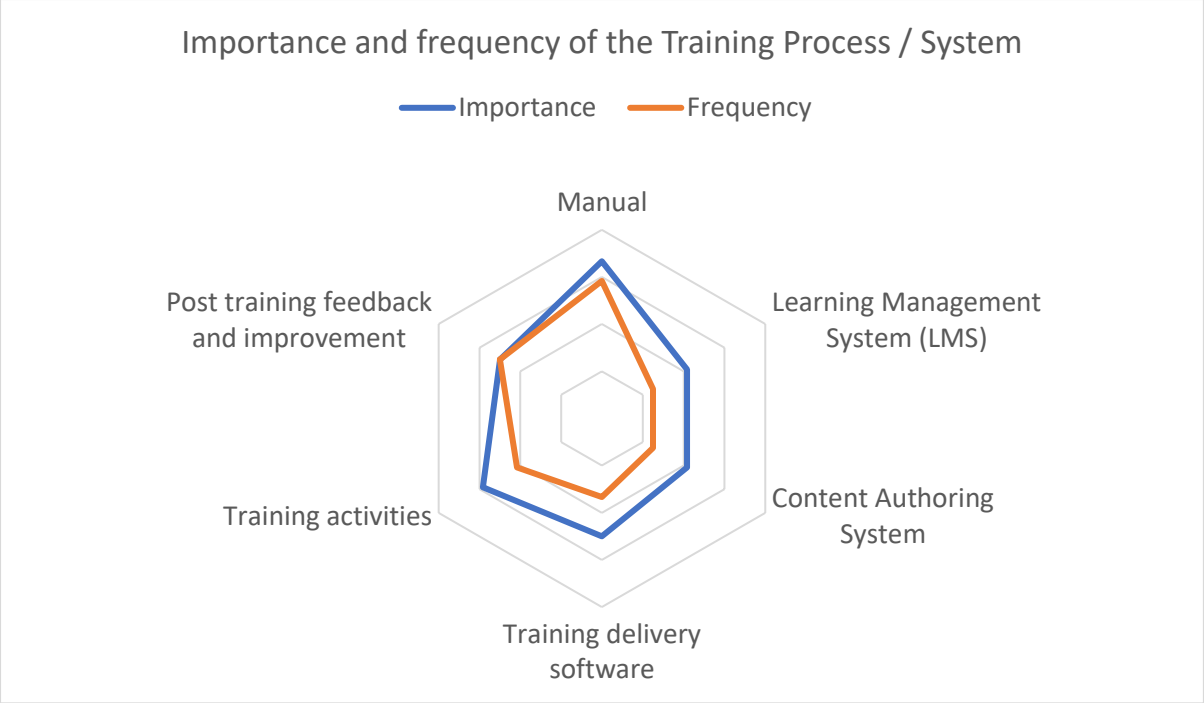


Diagram 64. Importance and Frequency of the Training Process/System used at LNCCI.

For LNCCI's Training Processes/Systems, a few gaps can be identified between the mode's importance and frequency in *Diagram 64*. For instance, there is a gap between the importance and frequency of Manual, LMS, Content Authoring System, Training delivery software, and Training activities where the importance of these Training Processes/Systems is higher than their frequency. This suggests that LNCCI can look into further developing these Training Processes/Systems to fully utilise them. Overall, the Training Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage.

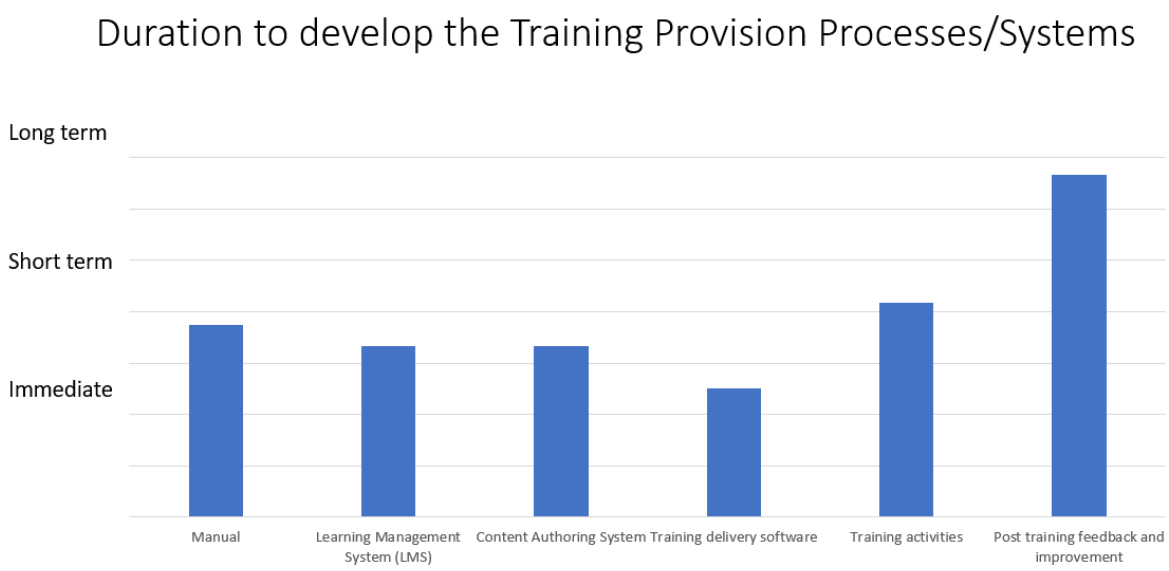


Diagram 65. Duration to develop Training Processes/Systems at LNCCI.

The low scores in *Diagram 65* indicate higher priority to LNCCI to develop Training Processes/Systems and high scores indicate a lower priority to develop Training Processes/Systems. For instance, Training delivery software scored the lowest indicating that the development of these Training Processes/Systems is considered LNCCI's highest priority. Similarly, Post-training Feedback and Improvement scored the highest and is therefore considered to be LNCCI's lowest priority in terms of developing Training Processes/Systems.

Corresponding to *Diagram 64*, it can be deduced that LNCCI aims to address the gap areas from *Diagram 64* as the gap areas indicate that they are of higher priority in *Diagram 65* than the Training Processes/Systems where no gaps can be identified.

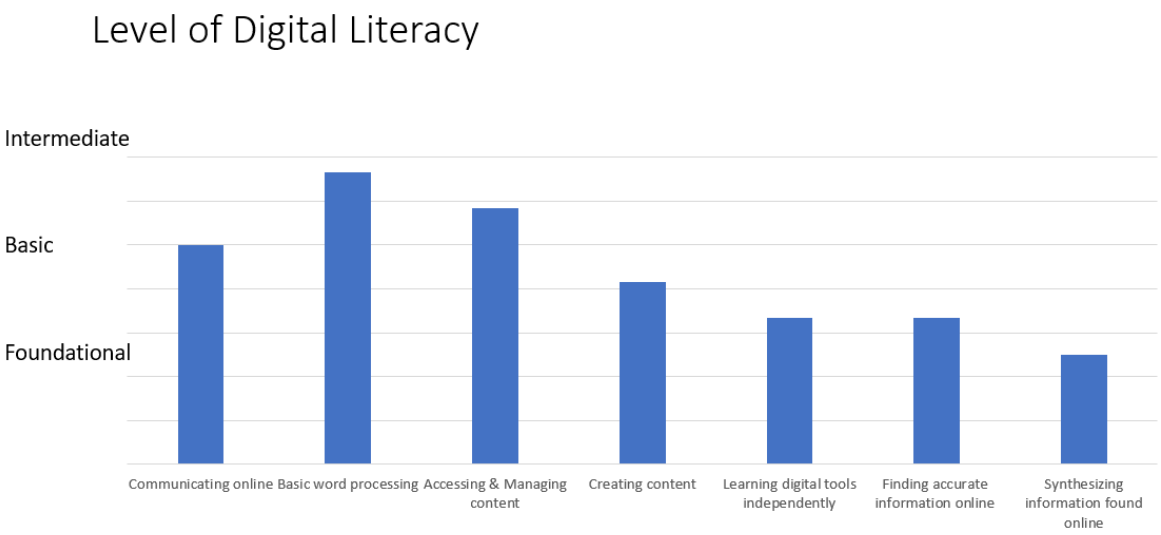


Diagram 66. Level of Digital Literacy at LNCCI.

For LNCCI's Staff Digital Literacy rates, *Diagram 66* indicates that the higher scores indicate higher levels of digital literacy and vice versa. For instance, basic word processing and accessing & managing content represent the highest scores indicated by *Diagram 66*. Similarly, learning digital tools independently and synthesizing information found online indicate lower digital literacy skills at LNCCI. Overall, LNCCI portrays a range of digital literacy skills past foundational skills and approaching intermediate skills.

Malaysia – Malaysian Employers Federation (MEF)

Diagram 67. Importance and Frequency of the mode of Engagement at MEF.

For MEF's mode of engagement, a few gaps can be identified between the mode's importance and frequency in *Diagram 67*. For instance, there is a gap between the importance and frequency of Community Participation, Events, and Exclusive Member Benefits where the importance of these modes is higher than their frequency. This suggests that MEF can look into further developing these modes to fully utilise them.

Although Official Communications, Informal Communications, Community Content Creation, Community Content Contribution, Training and Workshops, and Feedback have no gaps and are scored high indicating that there is no urgency to develop these areas in the immediate future, MEF may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

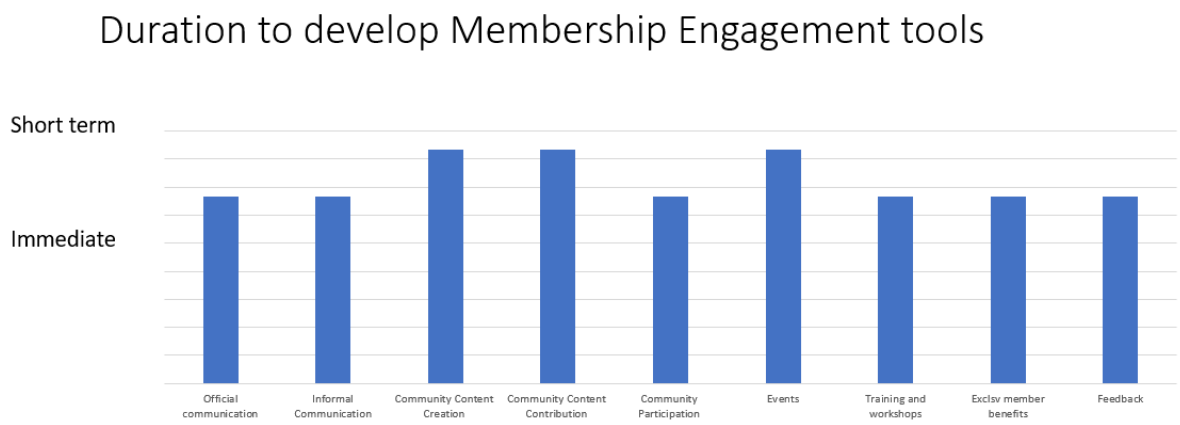


Diagram 68. Duration to develop Membership Engagement tools at MEF.

To begin, the low scores in *Diagram 68* indicate higher priority to MEF to develop Membership Engagement tools and high scores indicate a lower priority to develop Membership Engagement tools. For instance, Official Communications, Informal Communications, Community Participation, Training and Workshops, Exclusive Member Benefits, and Feedback scored the lowest indicating that the development of these modes of engagement are considered MEF's highest priority. Similarly, Community Content Creation, Community Content Contribution, and Events scored the highest and therefore considered to be MEF's lowest priority in terms of developing membership engagement tools.

In *Diagram 67*, all modes of engagement at MEF are scored relatively highly in terms of importance where there are gaps due to the relatively lower frequency scores. Similarly, *Diagram 68* reflects MEF's aim to address and develop all Membership Engagement tools between 3 months to 1 year. Hence, to promote growth and competitiveness of MEF's, gap areas from *Diagram 67* may want to be considered for development as well to improve MEF's digital capabilities.

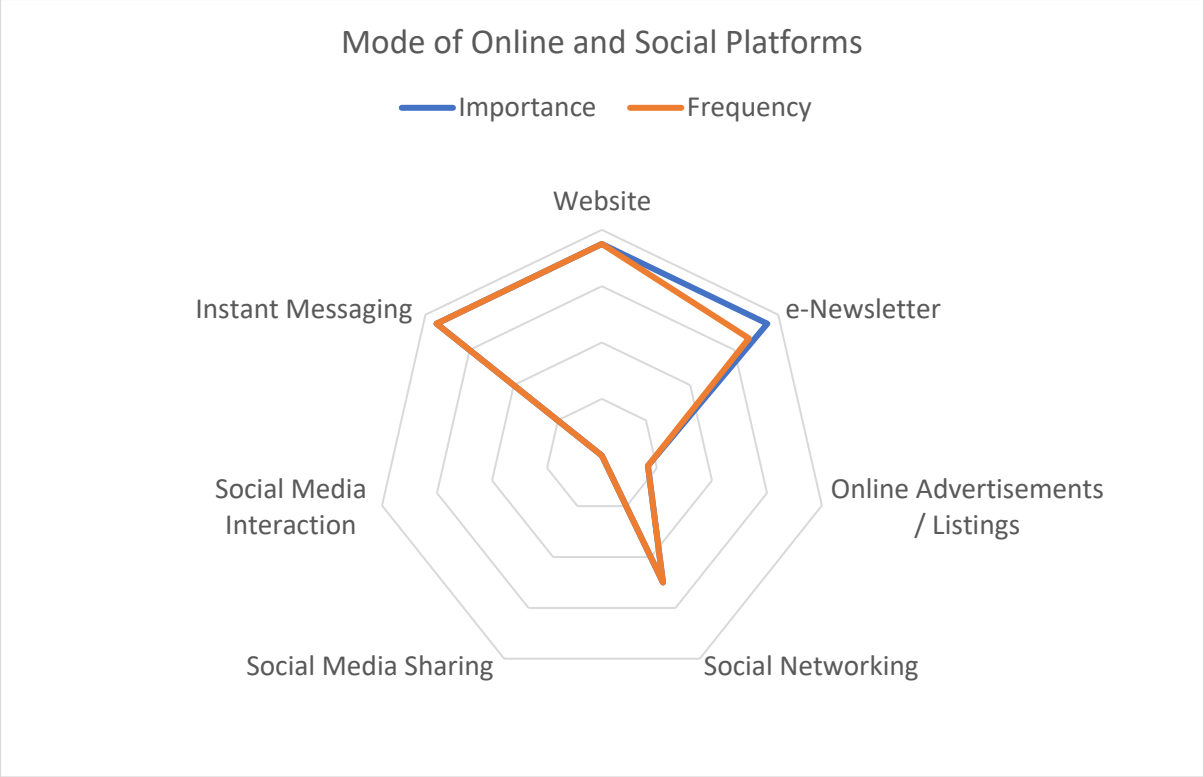


Diagram 69. Importance and Frequency of the mode of Online and Social Platforms at MEF.

For MEF's mode of online and social platforms, a few gaps can be identified between the mode's importance and frequency in *Diagram 69*. For instance, there is a gap between the importance and frequency of e-Newsletter where the importance of this mode of online and social platform is higher than its frequency. This suggests that MEF can look into further developing these modes to fully utilise them.

Although the modes of engagement where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage, MEF can consider developing Online Advertisements/Listings and Social Media Sharing in the longer term due to their overall low score. Similarly, although Website, Social Networking, and Instant Messaging have no gaps and are scored highly indicating that there is no urgency to develop these areas in the immediate future, MEF may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

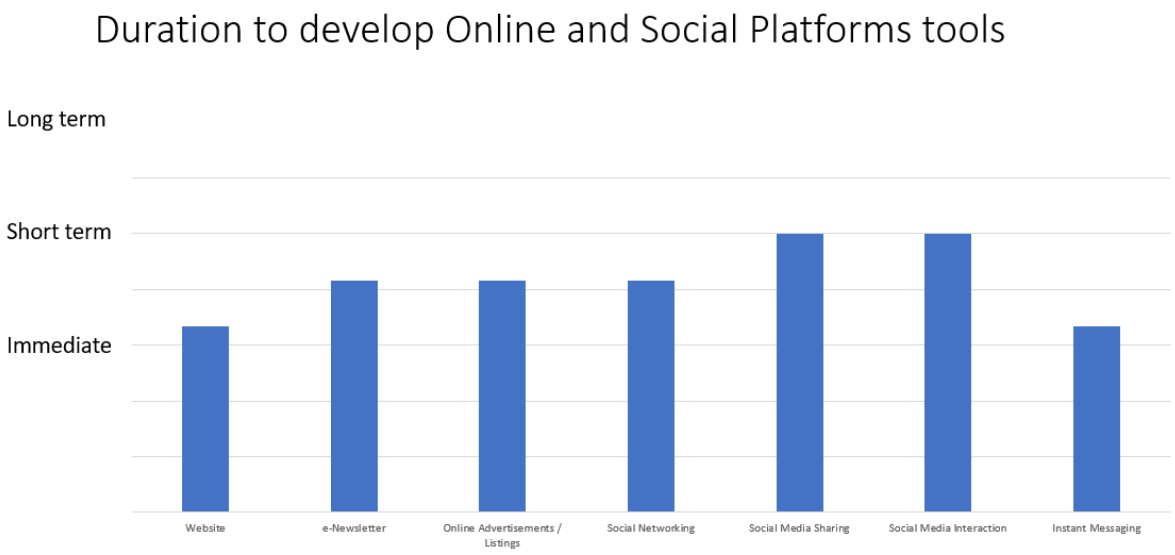


Diagram 70. Duration to develop Online and Social Platform tools at MEF.

The low scores in *Diagram 70* indicate higher priority to MEF to develop Online and Social Platforms tools and high scores indicate a lower priority to develop Online and Social Platforms tools. For instance, Website and Instant Messaging scored the lowest indicating that the development of these modes of Online and Social Platforms are considered MEF's highest priority. Similarly, Social Media Sharing and Social Media Interaction scored the highest and therefore considered to be MEF's lowest priority in terms of developing Online and Social Platforms tools.

Corresponding to *Diagram 69*, it can be deduced that the frequency of the Online and Social Platforms impacts the level of urgency in *Diagram 70*. For instance, both Website and Instant Messaging scored highly in terms of frequency whereas Social Media Sharing and Social Media Interaction scored the lowest in terms of frequency in *Diagram 69*.

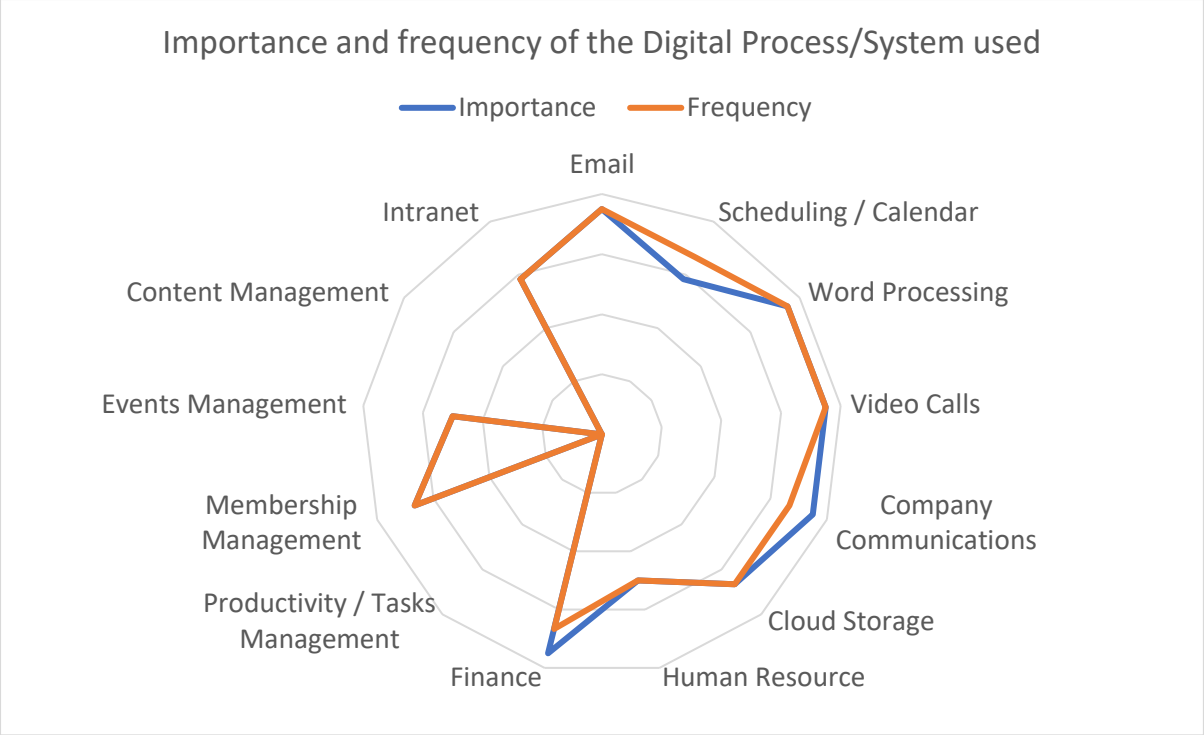


Diagram 71. Importance and Frequency of the Digital Process/System used at MEF.

For MEF's Digital Processes/Systems, a few gaps can be identified between the Digital Processes/Systems importance and frequency in *Diagram 71*. For instance, there is a gap between the importance and frequency of Company Communications and Finance where the importance of these Digital Processes/Systems is higher than their frequency. This suggests that MEF can look into further developing these Digital Processes/Systems to fully utilise them. Similarly, there is also a gap between the importance and frequency of Scheduling/Calendar where the frequency of this Digital Process/System is higher than its importance. This suggests that MEF may be spending too much time and effort on this Digital Process/System.

The Digital Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, MEF can consider developing the Digital Processes/Systems with relatively low scores such as Productivity/Tasks Management and Content Management in the longer term. Similarly, although Email, Word Processing, Video Calls, Cloud Storage, Human Resource, Membership Management, Events Management and Intranet have no gaps and scored high indicating that there is no urgency to develop these Digital Processes/Systems in the immediate future, MEF may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

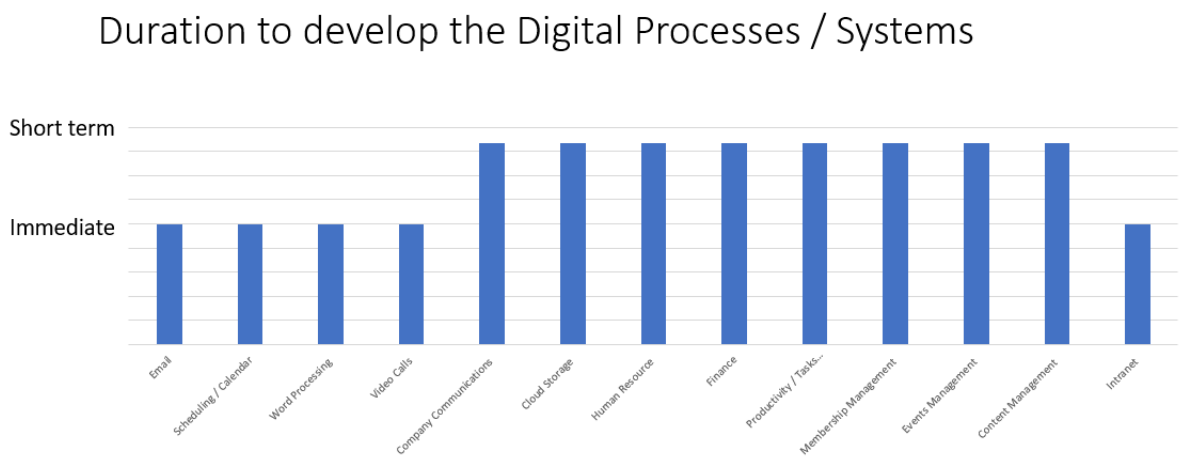


Diagram 72. Duration to develop Digital Processes/Systems at MEF.

The low scores in *Diagram 72* indicate higher priority to MEF to develop Digital Processes/Systems and high scores indicate a lower priority to develop Digital Processes/Systems. For instance, Email, Scheduling/Calendar, Word Processing, Video Calls, and Intranet scored the lowest indicating that the development of this Digital Process/System is considered MEF's highest priority. Similarly, Company Communications, Cloud Storage, Human Resource, Finance, Productivity/Tasks Management, Membership Management, Events Management, and Content Management scored the highest and therefore considered to be MEF's lowest priority in terms of developing Digital Processes/Systems.

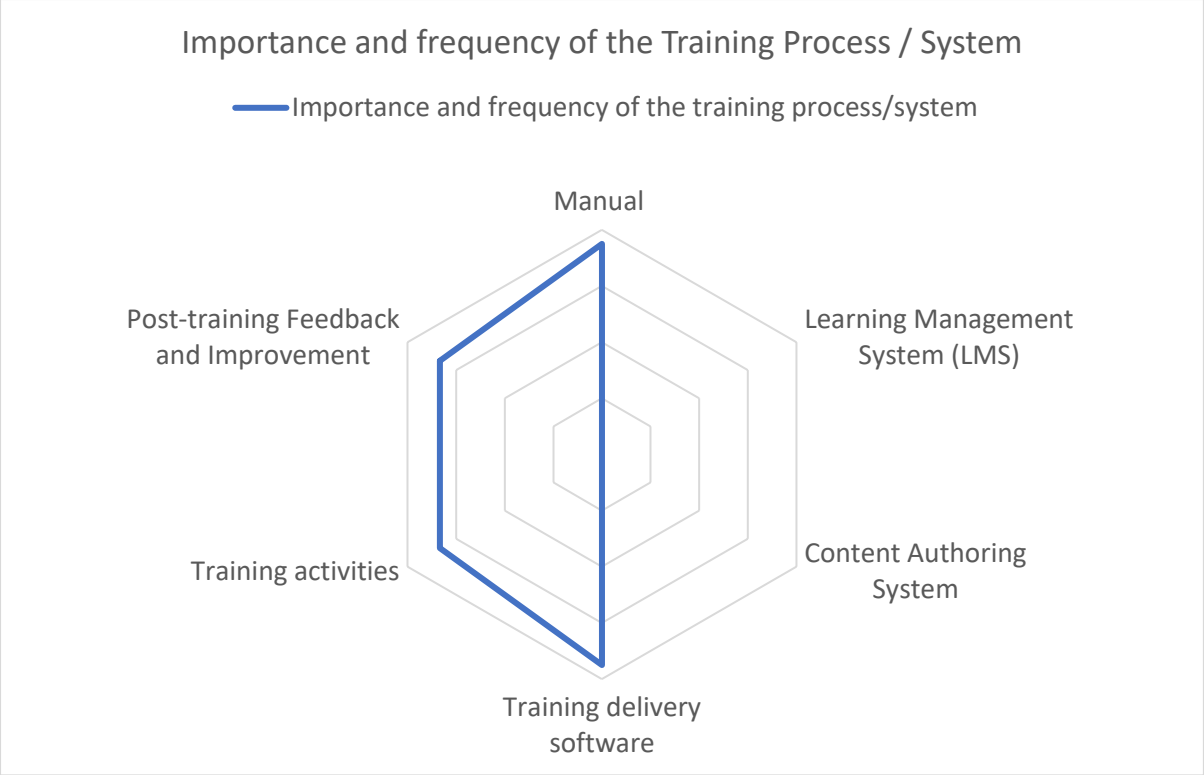


Diagram 73. Importance and Frequency of the Training Process/System used at MEF.

For MEF's Training Processes/Systems, there is a direct overlap of the importance and frequency scores in *Diagram 73*. Overall, the Training Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, MEF can consider developing the Training Processes/Systems with relatively low scores such as LMS and Content Authoring System in the longer term. Similarly, although Manual, Training delivery software, Training activities, and Post-training Feedback and Improvement have no gaps and scored high indicating that there is no urgency to develop these areas in the immediate future, MEF may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

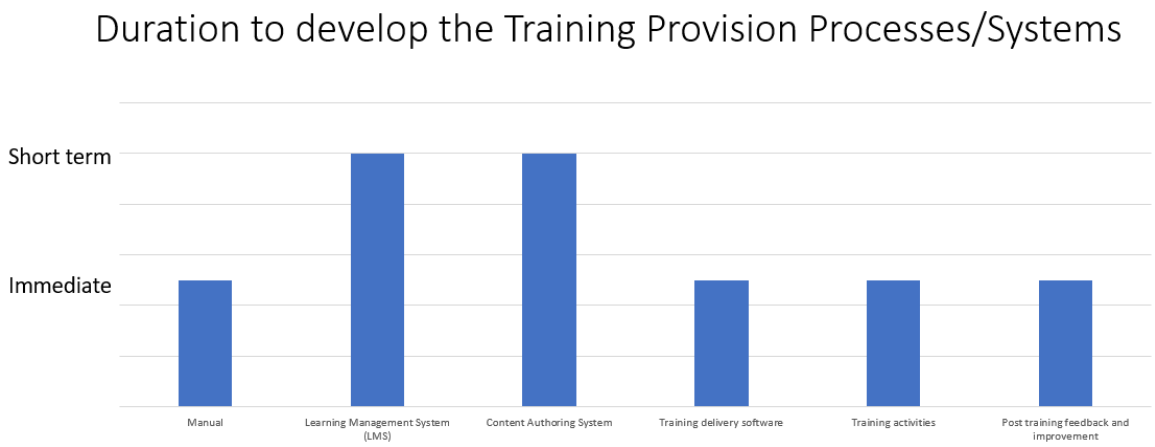


Diagram 74. Duration to develop Training Processes/Systems at MEF.

The low scores in *Diagram 74* indicate higher priority to MEF to develop Training Processes/Systems and high scores indicate a lower priority to develop Training Processes/Systems. For instance, Manual, Training delivery software, Training activities, and Post-training Feedback and Improvement scored the lowest indicating that the development of these Training Processes/Systems is considered MEF's highest priority. Similarly, LMS and Content Authoring System scored the highest and is therefore considered to be MEF's lowest priority in terms of developing Training Processes/Systems.

Corresponding to *Diagram 73,* it can be deduced that MEF aims to further develop the Training Processes/Systems that are already important and used frequently immediately (within 3-6 months). Similarly, it can be deduced that MEF aims to consider developing the Training Processes/Systems with relatively low scores from *Diagram 73* in the short-term (6 months- 1 year).

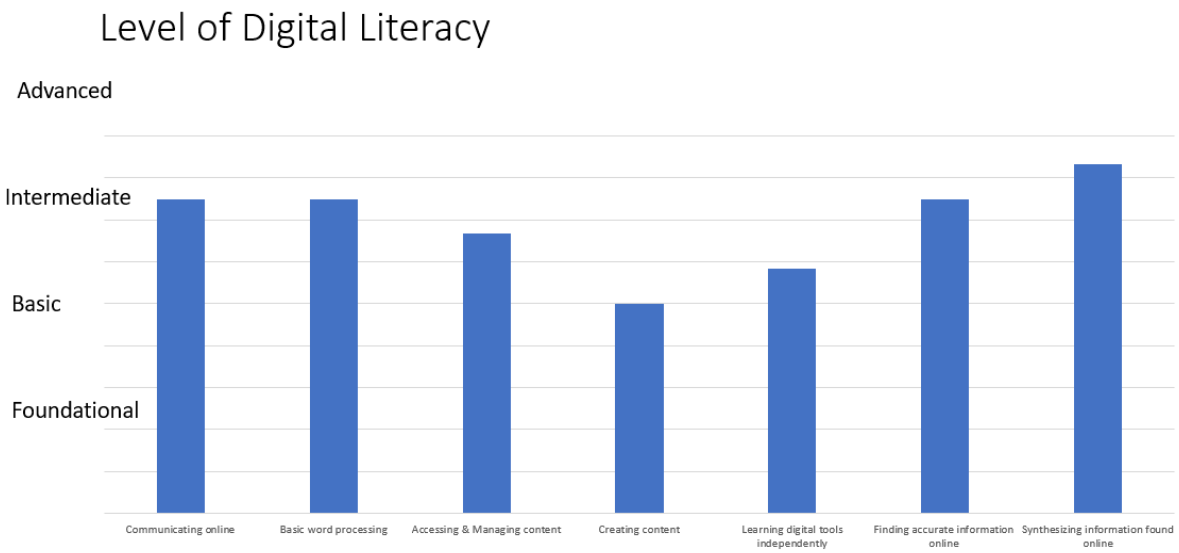


Diagram 75. Level of Digital Literacy at MEF.

For MEF's Staff Digital Literacy rates, *Diagram 75* indicates that the higher scores indicate higher levels of digital literacy and vice versa. For instance, synthesizing information found online represents the highest score indicated by *Diagram 75*. Similarly, creating content and learning digital tools independently indicate lower digital literacy skills at MEF. Overall, MEF portrays a range of digital literacy skills starting from basic skills and approaching advanced skills.

Vietnam – Vietnam Chamber of Commerce and Industry (VCCI)

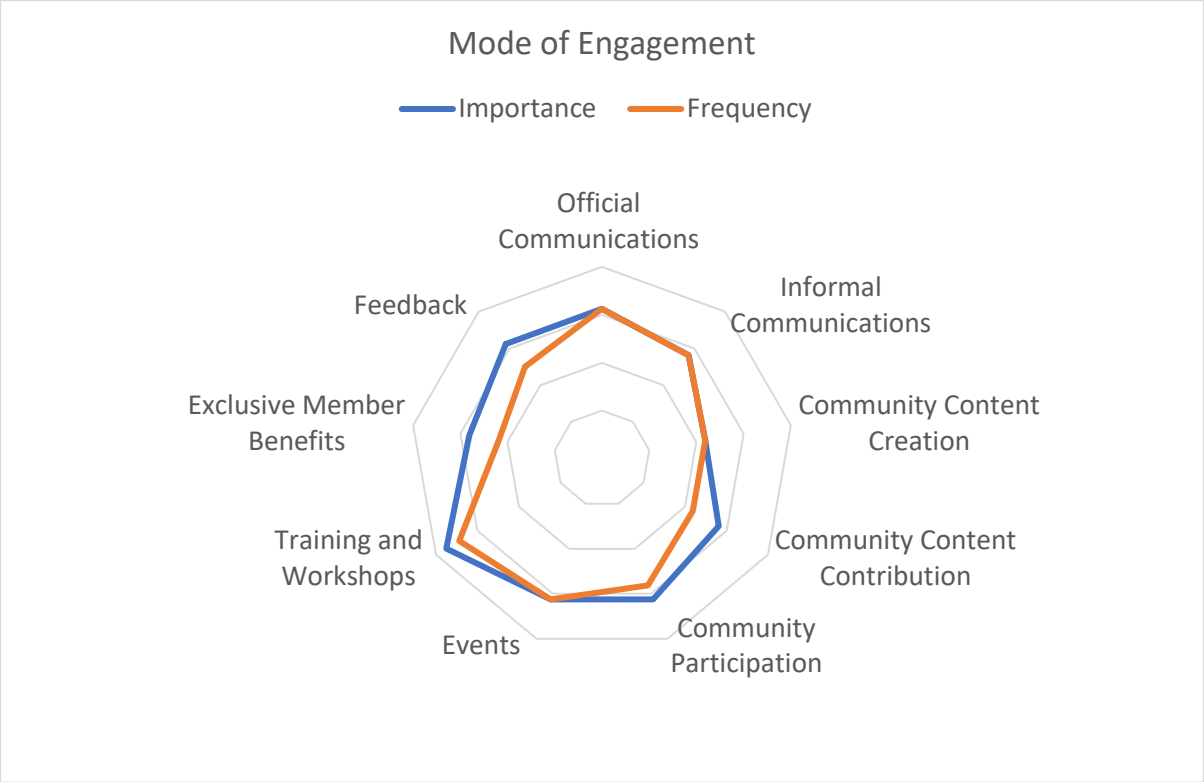


Diagram 76. Importance and Frequency of the mode of Engagement at VCCI.

For VCCI's mode of engagement, a few gaps can be identified between the mode's importance and frequency in *Diagram 76*. For instance, there is a gap between the importance and frequency of Community Content Contribution, Community Participation, Training and Workshops, Exclusive Member Benefits, and Feedback where the importance of these modes is higher than their frequency. This suggests that VCCI can look into further developing these modes to fully utilise them.

Although Official Communications, Informal Communications, Community Content Creation, and Events have no gaps and scored high indicating that there is no urgency to develop these areas in the immediate future, VCCI may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

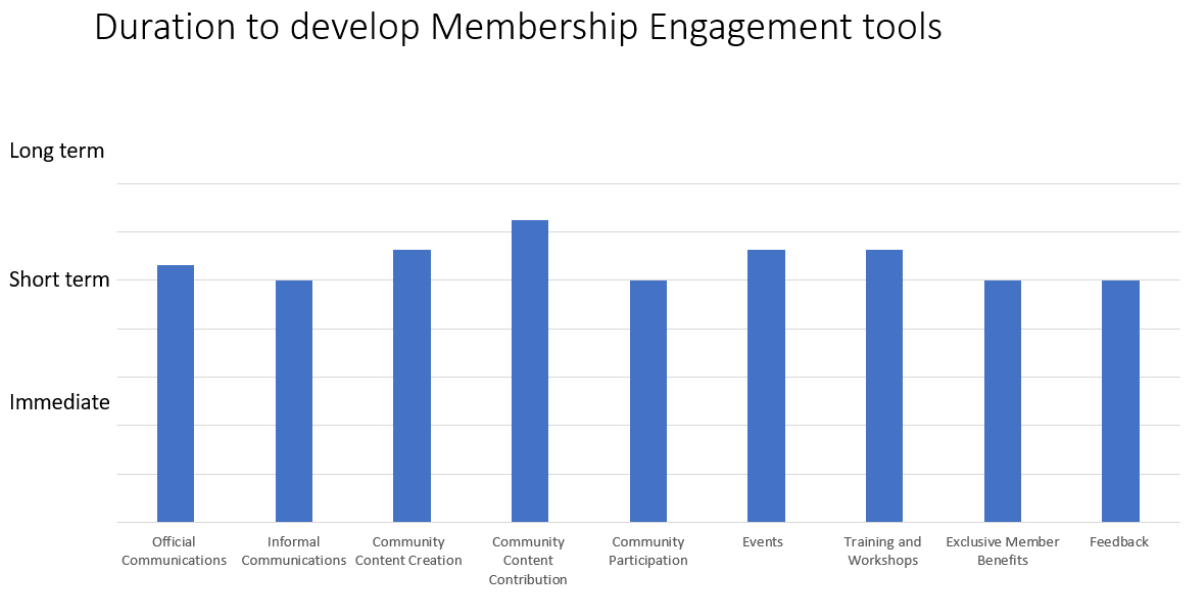


Diagram 77. Duration to develop Membership Engagement tools at VCCI.

The low scores in *Diagram 77* indicate higher priority to VCCI to develop Membership Engagement tools and high scores indicate a lower priority to develop Membership Engagement tools. For instance, Informal Communications, Community Participation, Exclusive Member Benefits, and Feedback scored the lowest indicating that the development of these modes of engagement are considered VCCI's highest priority. Similarly, Community Content Contribution scored the highest and is therefore considered to be VCCI's lowest priority in terms of developing membership engagement tools.

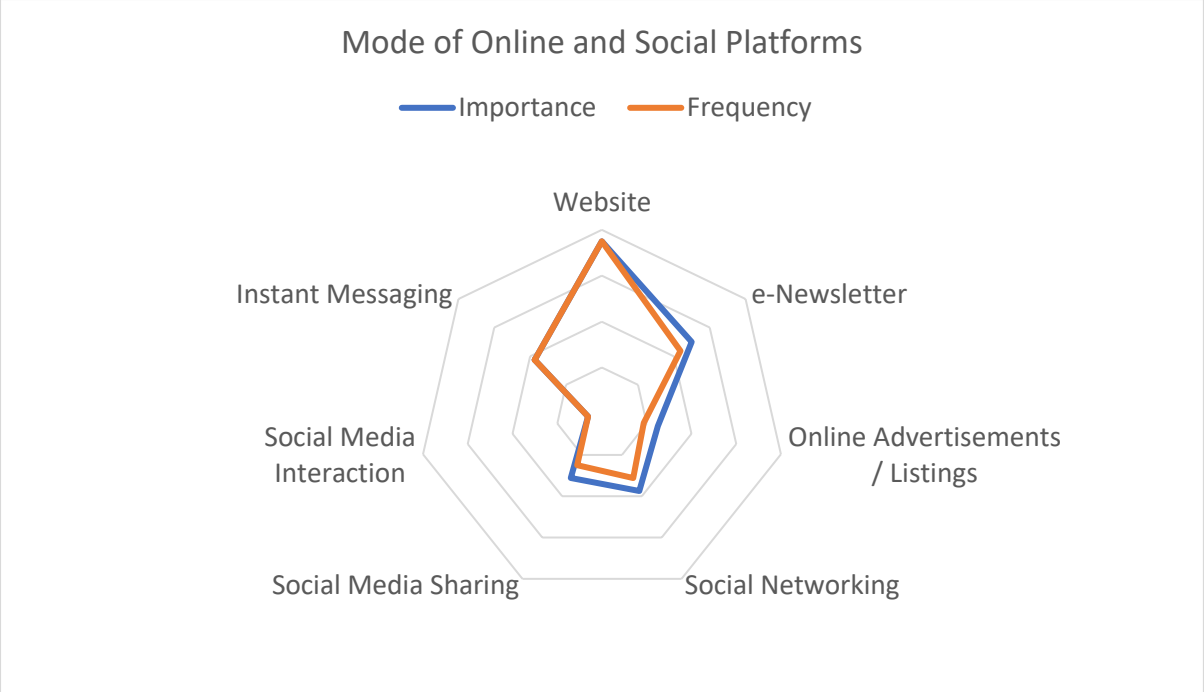


Diagram 78. Importance and Frequency of the mode of Online and Social Platforms at VCCI.

For VCCI's mode of online and social platforms, a few gaps can be identified between the mode's importance and frequency in *Diagram 78*. For instance, there is a gap between the importance and frequency of e-Newsletter, Online Advertisements/Listings, Social Networking, and Social Media Sharing where the importance of these modes of online and social platforms is higher than their frequency. This suggests that VCCI can look into further developing these modes to fully utilise them.

Although the modes of engagement where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage, VCCI can consider developing Social Media Interaction in the longer term due to its overall low score. Similarly, although Website and Instant Messaging have no gaps and are scored highly indicating that there is no urgency to develop these areas in the immediate future, VCCI may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

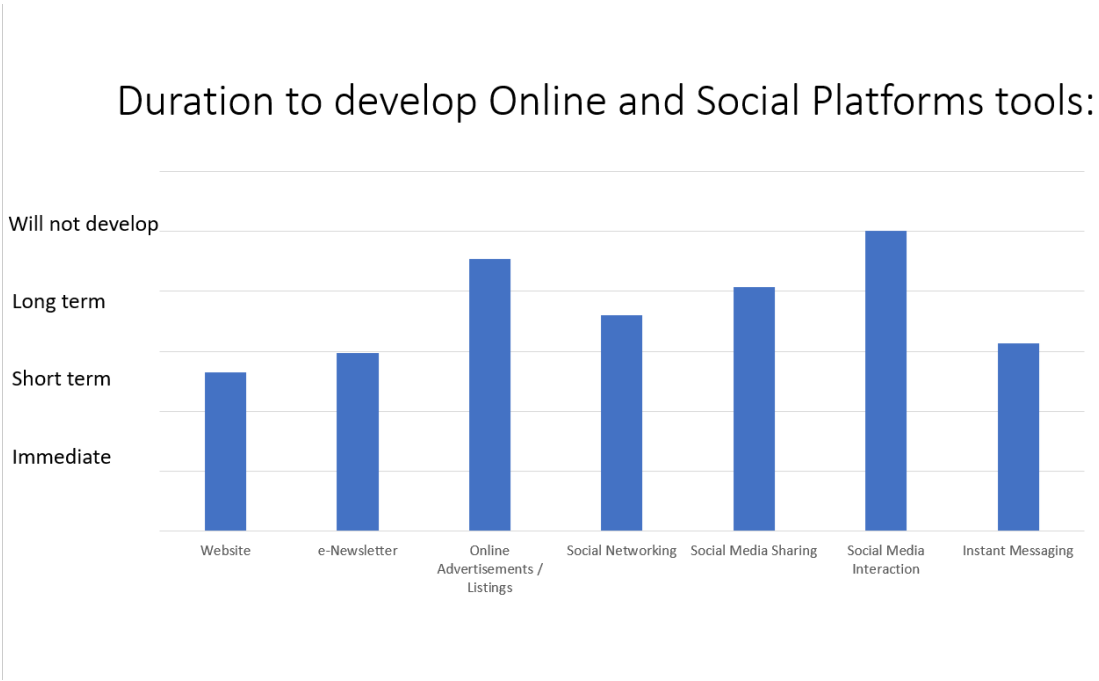


Diagram 79. Duration to develop Online and Social Platform tools at VCCI.

The low scores in *Diagram 79* indicate higher priority to VCCI to develop Online and Social Platforms tools and high scores indicate a lower priority to develop Online and Social Platforms tools. For instance, Website and e-Newsletter scored the lowest indicating that the development of these modes of Online and Social Platforms are considered VCCI's highest priority. Similarly, Social Media Interaction and Online Advertisements/Listings scored the highest and therefore considered to be VCCI's lowest priority in terms of developing Online and Social Platforms tools.

Corresponding to *Diagram 78,* it can be deduced that VCCI aims to further develop Online and Social Platforms tools that are already important and used frequently then consider developing the Online and Social Platforms tools with relatively low scores from *Diagram 78*; apart from Social Media Sharing which VCCI plans not to develop.

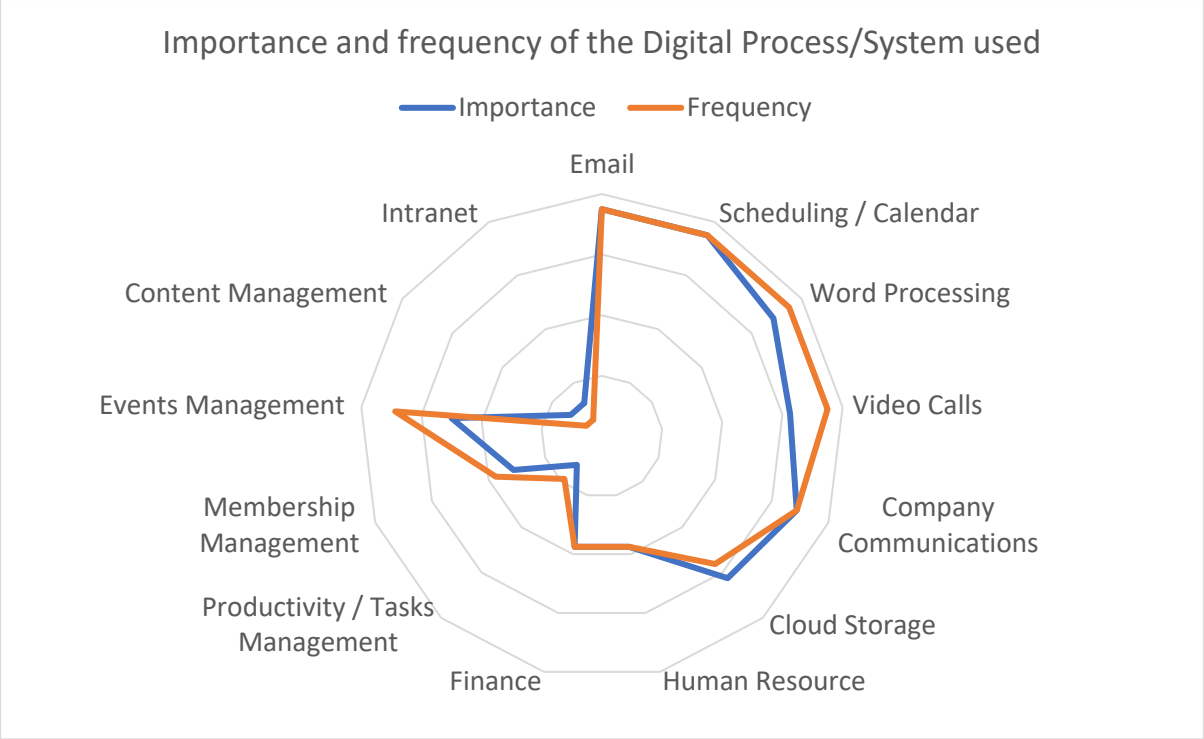


Diagram 80. Importance and Frequency of the Digital Process/System used at VCCI.

For VCCI's Digital Processes/Systems, a few gaps can be identified between the Digital Processes/Systems importance and frequency in *Diagram 80*. For instance, there is a gap between the importance and frequency of Cloud Storage, Content Management, and Intranet where the importance of these Digital Processes/Systems is higher than their frequency. This suggests that VCCI can look into further developing these Digital Processes/Systems to fully utilise them. Similarly, there is also a gap between the importance and frequency of Word Processing, Video Calls, Productivity/Tasks Management, Membership Management, Events Management where the frequency of this Digital Process/System is higher than its importance. This suggests that VCCI may be spending too much time and effort on this Digital Process/System.

The Digital Processes/Systems where no gaps can be identified imply that these areas are not of critical concern currently due to the congruence between the level of importance and frequency usage. However, VCCI can consider developing the Digital Processes/Systems with relatively low scores such as Human Resource and Finance in the longer term. Similarly, although Email, Scheduling/Calendar, and Company Communications have no gaps and scored high indicating that there is no urgency to develop these Digital Processes/Systems in the immediate future, VCCI may want to continue keeping up with trends in these areas as any further improvements will have a larger impact on the organisation.

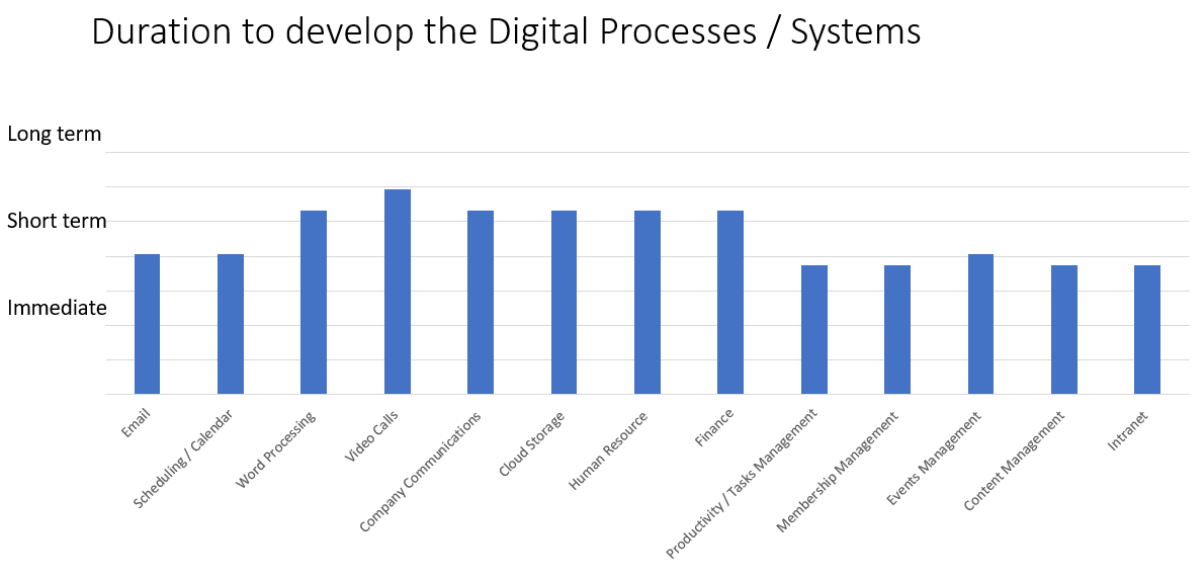


Diagram 81. Duration to develop Digital Processes/Systems at VCCI.

The low scores in *Diagram 81* indicate higher priority to VCCI to develop Digital Processes/Systems and high scores indicate a lower priority to develop Digital Processes/Systems. For instance, Productivity/Tasks Management, Membership Management, Content Management, and Intranet scored the lowest indicating that the development of this Digital Process/System is considered VCCI's highest priority. Similarly, Video calls scored the highest and is therefore considered to be VCCI's lowest priority in terms of developing Digital Processes/Systems.

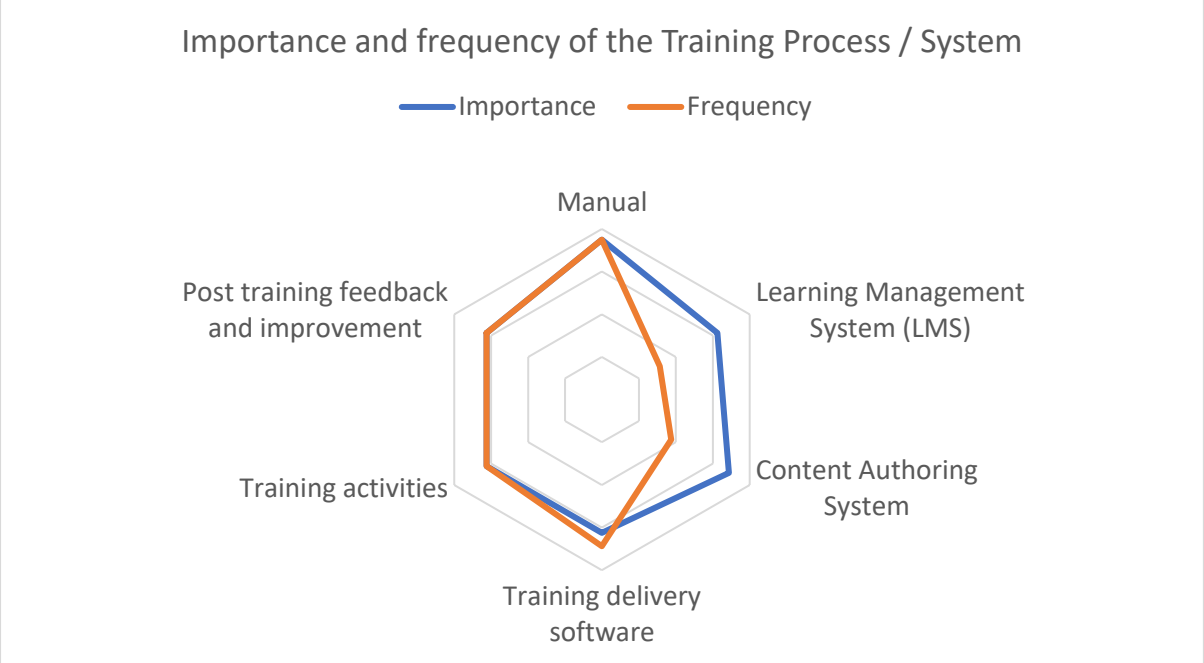


Diagram 82. Importance and Frequency of the Training Process/System used at VCCI.

For VCCI's Training Processes/Systems, a few gaps can be identified between the mode's importance and frequency in *Diagram 82*. For instance, there is a gap between the importance and frequency of LMS and Content Authoring System where the importance of these Training Processes/Systems is higher than their frequency. This suggests that VCCI can look into further developing these Training Processes/Systems to fully utilise them. Similarly, there is also a gap between the importance and frequency of Training delivery software where the frequency of this Training Process/System is higher than its importance. This suggests that VCCI may be spending too much time and effort on this Training Process/System.

Although Training activities and Post-training Feedback and Improvement has no gap and is scored relatively high, indicating that there is no urgency to develop these areas in the immediate future, VCCI may want to continue keeping up with trends in these areas area as any further improvements will have a relatively large impact on the organisation.

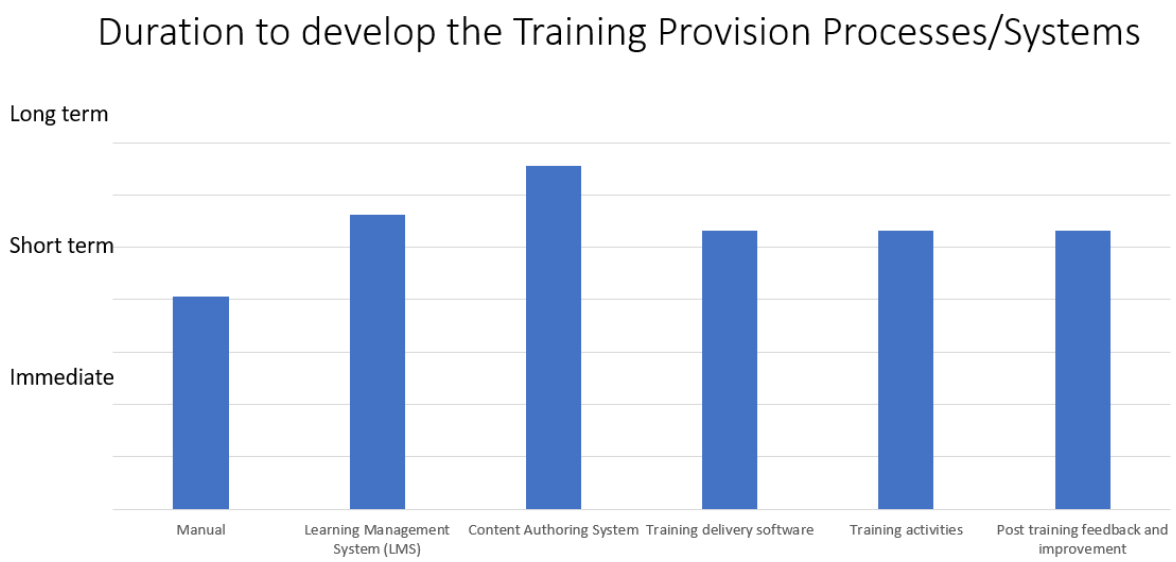


Diagram 83. Duration to develop Training Processes/Systems at VCCI.

The low scores in *Diagram 83* indicate higher priority to VCCI to develop Training Processes/Systems and high scores indicate a lower priority to develop Training Processes/Systems. For instance, Manual scored the lowest indicating that the development of these Training Processes/Systems is considered VCCI's highest priority. Similarly, Content Authoring System and LMS scored the highest and is therefore considered to be VCCI's lowest priority in terms of developing Training Processes/Systems.

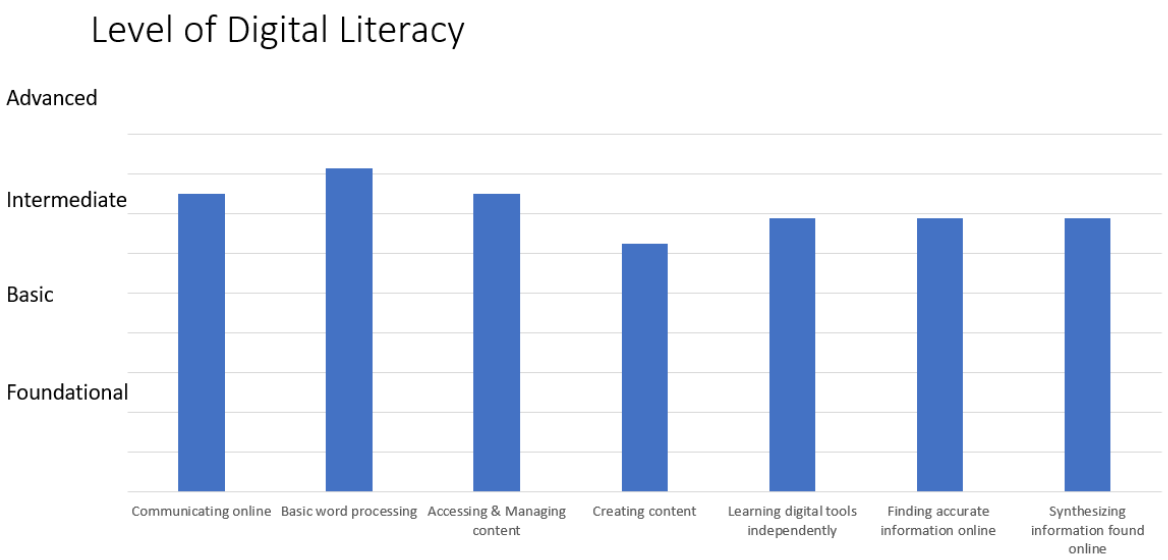


Diagram 84. Level of Digital Literacy at VCCI.

For VCCI's Staff Digital Literacy rates, *Diagram 84* indicates that the higher scores indicate higher levels of digital literacy and vice versa. For instance, basic word processing, accessing & managing content, and communicating online represent the highest scores indicated by *Diagram 84*. Similarly, creating content indicates the lowest level of digital literacy skills at VCCI. Overall, VCCI portrays a range of digital literacy skills past basic skills and approaching advanced skills.

Overview of Interviews

EBMOs are large and serve from 340 to over 10,000 member organizations. Most play a leadership, advisory, and/or advocacy role for member organisations and are either government-linked or participate in government policy-making forums/discussions. Most EBMOs are facing challenges with engaging members and maintaining membership in the current Covid climate.

Technology and digitalisation is generally viewed as one of the enablers to maintain positive membership engagement and retention in the Covid climate, and has pushed adoption of certain forms of technology such as virtual training or minimally a blended approach to learning or increase use of video call applications.

However, adoption and maintenance costs are high, and skilled staff/manpower is needed to embark on the digitalisation journey. Usage of multiple software can also incur integration costs as data would need to flow seamlessly between software to generate useful insights for the organisation, and requires an even higher level of technical knowledge.

Hence learning of IT/tech skills is key in this period, and while this generally is not an issue for the younger generation, it may pose a challenger for older workers who are unable to adapt as quickly.

Red tapes in more closely government linked or larger EBMOs also pose a challenge in adoption of tech as there are more processes required and less flexibility/agility is allowed for the EBMO / individual business units to initiate technology adoption on its own.

Singapore – Singapore National Employers Federation (SNEF)

Findings from SNEF were reported in the desktop review section of the paper, with key pointers from the interview as below:

SNEF has a practice to test and adopt potential tech and IT solutions internally first before recommending it to member organisations. This allows them to ascertain if the tech / IT solution works as claimed, providing a first level quality assurance to member organisations in the selection process of tech and IT solutions.

SNEF's approach to digitalisation is to support human capital in the organisation, not replace it. For example, tech is used to automate routine and error-prone tasks, so that staff can be less bogged down with manual work and can focus on more value-added tasks driving stronger business outcomes. Tech can also be implemented in a "bite-sized" manner, simplifying specific tasks for faster adoption and thereby requiring less technical learning from staff.

SNEF also utilises a community-based content sharing platform internally, where staff can curate and share relevant information and articles which are then summarised into a weekly update. This can include latest industry happenings and trends, and is a valued source of information for the organization.

Cambodia – Cambodian Federation of Employers and Business Associations (CAMFEBA)

Largest challenges were digital skills, staff capabilities, and cost. Management has a good understanding of tech and its applications (i.e. Sugar CRM, Social Media Engagement), but learning curve is steep for staff especially where technical knowledge is required. Management also has to make the call in selecting the right tools to avoid complications with existing digital processes and systems.

Currently more capable staff are learning essential technologies first like Zoom, then they will teach other members of the staff. This results in higher dependence on the technologically-savvy staff, but the end goal is to improve the capabilities of the whole team and not that just that one individual.

Another challenge is contingency management as a result of adopting new technologies. For instance, while Facebook, LinkedIn, and Twitter can be used to reach out to communities and large audiences rapidly, if any posts or articles are not worded correctly or gets a strong negative response,

the same rapid dissemination of information on the internet makes managing Public Relations that much harder as well.

Malaysia – Malaysian Employers Federation (MEF)

MEF is unique in the aspect that it is purely an employers' federation and partners with various industry associations to represent and advocate for employers, including negotiations for termination and unemployment benefits adjustments.

Through the use of digital engagement methods, inter-state representation for council meetings and membership events had improved approximately 3 times more than compared to the typical face-to-face mode. This could be attributed to lowered overhead costs (i.e. travel & accommodation) as well as increased accessibility of participation.

MEF has a research and publications arm that also adopted digital tech specifically in the conduct and analysis of data which streamlined manual operations such as data entry. However this came with its own set of challenges such as protecting IP rights for online publications, which requires specific knowledge and skill sets.

Further technological enhancements include considerations to adopt cloud infrastructure, develop social media engagement capabilities, leverage on instant messaging capabilities, and enhance existing chatbot technologies.

Philippines – Employers Confederation Of The Philippines (ECOP)

ECOP had a similar challenge to MEF of coordinating across multiple geographical locations via provinces. This was supported during the Covid situation by rapid adoption and normalisation of digital tools such as video calls and instant messaging tools. ECOP also uses a wide variety of digital tools including a combination of free and paid tools to save on time and cost, such as productivity tools, design tools, email marketing tools, learning management systems, invoicing, and digital banking services.

By utilising online and social platforms, ECOP's Facebook followers increased from 1-2k to 13k during the pandemic period, which demonstrated a huge increase in engagement with member organisations through the adoption of digitalisation. The integrated Facebook Messenger app was also used to facilitate communications with chapters, enhancing engagement. Memberships have also increased year on year, reflecting that employer organisations in the Philippines see the benefit of the digital mode of engagement.

Training is also the most active department in ECOP now, and presents the best pipeline to engage potential members. Training is delivered in a blended learning format via an asynchronous model of ecampus learning as some member organisations still prefer a face-to-face format, but staff have a positive attitude towards digitalisation and a high capacity to learn related skills.

Lastly, ECOP is planning to launch a digital TV programme in a talkshow format under the memberships arm to further improve engagement with member organisations as well as reach out to potential organisations. This is aligned to a content creation approach which has shown to improve engagement outcomes over time.

Vietnam – Vietnam Chamber of Commerce and Industry (VCCI)

VCCI takes a strong compliance approach, utilising the legal perspective where it protects the interests of employers before the law. VCCI actively participates in the development of labour law policies and participates in national level committees. However, as VCCI is not officially recognised by local authorities and trade unions, hence the ability to link up with business associations is still relatively weaker.

A positive impact of adopting digitalisation was the increased volume of delivering online training courses as the digital format is more widely accessible, and is expected to be maintained post-Covid as well.

VCCI also promoted comprehensive digital transformation to adopt a virtual workplace approach, including a legal framework for new types of businesses to meet the needs of the digital economy. This includes setting up an e-campus learning management system to deliver online training, in addition to streamlining the blended learning approach.

VCCI has also created members-only accessible content, such as official announcements in relation to the Covid situation, Forums, and Workplace support groups. Content-specific forums targeting specific industry sectors have also been set up.

Key Insights

Digital infrastructure of EBMOs in the region

Stable access to the internet

Reliable internet access is a factor that can greatly facilitate or hinder digitalisation efforts in ASEAN countries. With regards to internet accessibility, internet speed can be a key factor when considering and comparing tech adoption between ASEAN countries. For instance, high internet speed countries such as Singapore and Thailand would have a greater advantage than low internet speed countries such as Myanmar, Cambodia, and Indonesia. This factor can limit the efficiency of the technologies adopted due to the digital infrastructure in the region.

Similarly, network coverage is an indicator of national digital infrastructure across the ASEAN region. For example, some ASEAN countries have not implemented a 5G policy such as Indonesia, Vietnam, the Philippines, and Malaysia, whereas Singapore is considered among the 5G leaders across the region. This can also reflect the respective government's financial support towards network expansion support and developing digital infrastructure. In addition, MEF addresses such internet connectivity issues where they acknowledge the difficulties enterprises face with connecting electronically.

Purchase and maintenance costs of IT equipment and solutions

A key consideration of EBMOs in their adoption of digitalisation is the costs involved, namely purchase and maintenance costs. Especially during this challenging Covid business environment, organisations are struggling financially and need to focus efforts on pivoting and responding to the demands of the new virtual business environment. This would mean having less expendable resources in general, and needing to prioritize existing resources to address the most critical business needs and challenges.

Hence purchasing new IT equipment (i.e. computers for offices, laptops for remote working) would potentially become a priority for organisations but developing further digital capabilities like converting training delivery from face-to-face to virtual or shifting member engagement from physical events and activities to virtual may pose a much larger challenge as it not just involves equipment but a host of related software and services, which can incur purchase and licensing fees, making organisation-wide digitisation efforts more challenging.

Individual digital skill levels and attitudes

Additionally, member organisations' and local community's IT skill levels will also affect the EBMO's decisions on whether to adopt digitalisation efforts. If the majority of members are not tech-savvy or do not have the capabilities to use digital platforms and solutions, efforts to enable digital capabilities in the EBMO may not reap results and benefits as quickly.

Generally, the findings conclude that ASEAN EBMOs possess all types of digital literacy skills where they lie within the highest quartile of staff skill possession. This can be due to the provision of IT support and trainings as well as due to the existence of younger staff within the organisation. For instance, ECOP possesses a wide range of digital platforms such as JotForm, Canva, Google Workplace, Zoom, LMS, Mailchimp, Slack as well as digital banking services where they previously used PayPal but then switched to a digitalised local banking service. The internal digital capabilities supports the use of such digital platforms and solutions; whereas if digital capabilities were low, they would struggle to keep up with the various digital tools.

Current status of digitalisation

Most EBMOs in the region had embarked on some level of digitalisation with contextualisation to their organisational requirements. However, there were variances between EBMOs, with some being more reliant on traditional means, while others were looking at more advanced digital solutioning.

For example, for membership engagement, both ECOP and MEF portrayed initiatives to engage members at a provincial/regional level. For instance, ECOP made use of digital platforms for engagement, where they were able to mobilise more members to attend consultations with the government and triple employers' participation in tripartite meetings. By reducing the need for travel, it is more convenient for most parties to join such meetings. Similarly, MEF's conversion online had saved costs with regards to engagement by state. In addition to the tripled attendance, regional meetings' online platform eliminated costs such as transportation, accommodation, refreshments, entertainment, as well as venue booking and investment for a more professional set up for such meetings.

As for the online and social presence of EBMOs, MEF, SNEF, and ECOP utilised unique ways to present more advanced digital solutioning. For example, MEF pioneered in utilising a chatbot "Emilia" on their webpage. MEF intends to develop the chatbot to be a single point of contact for membership, legal, products, and services FAQs. SNEF aims to capitalise the use of social media for marketing. This mainly includes Facebook and LinkedIn, where Google Analytics is used to track user engagement and therefore impact marketing methods. Similarly, ECOP's progress regarding their online presence is obvious during the transition. Their Facebook followers jumped from approximately 1-2k followers to 13k followers in less than 2 years. This is due to ECOP posting articles and more engaging materials on Facebook and LinkedIn.

As for process and delivery, CAMFEBA leveraged on more advanced digital platforms and systems such as SugarCRM and accounting platforms. CAMFEBA also utilised SugarCRM for membership management where it stores its database of CAMFEBA members. This is also integrated and synchronised with MailChimp for highly targeted and efficient marketing, communication, and engagement with members.

When considering the digitalisation of training systems in EBMOs, ECOP's Digital Learning eCampus is an example of one of the more advanced and efficient digital solutioning initiatives adopted in ASEAN, particularly during the pandemic. The eCampus utilises a learning management system (LMS) software that permits ECOP to provide courses and programmes fully online or as a hybrid model. Similarly, SNEF's training administration capabilities are also advanced, where applicants can view a calendar of events year-round for the latest available courses, and apply for courses and workshops with options for government funding at various brackets, as well as options for Company versus Self payment options. CAMFEBA's and VCCI's eCampus development also portrays a step towards the digitalisation of training systems. In addition, by digitalising their training systems, CAMFEBA and VCCI will increase the quality of training programmes provided respectively.

As an indicator of the level of digital maturity as well as the mindset and readiness of an organisation for digitalisation, SNEF shines when considering their staff digital literacy/proficiency. Their approach to support human capital development in the organisation instead of outsourcing or hiring replacements indicates the positive mindset they have towards technology adoption as well as the staff's capabilities. Similarly, their approach of conducting internal testing of software before recommending the best software to members in the selection process of tech and IT solutions indicates SNEF's proactiveness towards digitalisation leadership and improving the level of digital adoption for their member organisations.

Challenges faced to digitalise

Infrastructure and cost as mentioned in previous section above play a big role in the face of digitalisation. However, aside from that, other challenges have also been surfaced through the surveys and interviews.

Staff mindsets and skill levels within the EBMO itself can affect the speed of adoption. Younger staff with greater tech-savviness and willingness to pick up relevant skills can accelerate digitalisation efforts in the EBMO. For instance, ECOP's younger staff's willingness to explore new technologies and their overall enthusiasm accelerated the EBMO's digitalisation efforts. However, other EBMOs have may lack such capabilities and are challenged by various digital platforms such as social media management, content creation, and their overall interaction on online platforms.

Similarly, some EBMOs are faced by staff or members who are resistant to learning or are unable to pick up the required technological skills, which can hinder digitalisation efforts of the EBMO. For instance, SNEF initially struggled with the transition online where not all staff and members were tech savvy and faced problems with accessing Zoom sessions and training workshops via Zoom. Hence, EBMOs would require stronger support from other more tech-savvy members of staff, or provide similar tech troubleshooting services to members, further straining existing resources.

Leadership's attitudes towards digitalisation will also affect the EBMOs progress. This includes the existing organisational policies and practices - for instance, using digital skills proficiency as a staff performance indicator. More traditional leadership models may not be receptive to include similar measures as an indicator of performance due to fear of (cyber)security related issues in terms of the adoption of technology and making the organisation vulnerable to more risks. This misalignment may lead to ineffective digital transformation and can negatively impact the organisation in being prepared for the future where work becomes increasingly digitalised to maintain its competitive edge.

Organizational transformation readiness for digital data-driven change

EBMOs in the ASEAN region generally have positive attitudes towards change. Given the adequate support, the majority of ASEAN EBMOs would want to embark on digitalisation in the near future across most of the 5 dimensions identified. As cost is the largest limiting factor for most EBMOs, support from the ILO, in terms of funding for the adoption of technologies and the development of specific capabilities can be the catalyst for digital adoption.

There are a number of EBMO efforts that indicate organisational readiness for digital transformation. For example, MEF's use of various digital formats for survey administration streamlining process and analysis. MEF initially relied on print and post surveys but has now leveraged an online surveys software. They use Enterprise Feedback Management (EFM) systems to collect, distribute, analyse and manage survey feedback. In addition, MEF purchased server technologies from Japan to gain a competitive advantage with regards to their digital resources many years back before technology adoption was commonplace. They were also supported through funding from Japanese Employers federation for computerisation and IT.

Similarly, ECOP's efforts towards organisational readiness for transformation is evident in their active membership engagement approach. For instance, ECOP is building the foundation for wider digital transformation as they are actively engaging members and developing local communities with close communications. Their initiatives toward launching "ECOP talk show" as a digital TV programme for further membership development and enhance their online and social presence for

their members and local communities indicate that their baseline preparedness for digitalisation is high and they are ready to embark on larger scale organisational transformation.

Limitations of Study

Improvements to Study Design

Mode of Reporting

The current survey utilised a self-reporting format of questioning, which was subject to the individual respondent's interpretation of the question. Efforts were taken to ensure neutrality of phrasing and objectivity in questioning, however certain individual biases may be unavoidable due to the nature of the reporting format.

Hence future studies can consider using more objective methods of data collection such as by collecting and analysing organisational data and reports for objective evaluation of scores and findings to cross reference and validate findings from the initial survey. However these methods would be more resource intensive and are subject to availability from the respondent organisations as well.

Exploration of non-Participation

It would be beneficial to understand from EBMOs who were invited but did not participate as to what the challenges faced were, whether it could be due to difficulties accessing the digital platform, lack of a stable internet network, or other operational or business challenges. This limits the range of EBMOs within the ASEAN region and can hinder with the precise representation of the study.

Improvements to Study Administration

Increase in Sample Size

The current sample size limits the areas of analysis as the number of respondents are not large enough to do comparisons across groups. For instance, an increase in sample size could warrant investigating the differences between ASEAN EBMOs and other countries' EBMOs as well as explore the variations between different organisation types. In addition, a larger sample size would enable analysis to be conducted across areas of work or years of experience and provide a more insights as well as a more accurate representation of each country overall.

Longer Administration Period

Increasing the duration of the administration period would allow for the facilitation of scheduling arrangements that can potentially lead to an increase in the sample size of the study. For instance, increasing the duration of this study can capture the potential lag-effects of the pandemic where EBMOs are struggling to adapt and pivot to new business models. Hence, it would be beneficial to extend the duration of the study to a year or conduct it in a staged multi-phase approach.

Communication Channels

The current study only used email, but perhaps by using Instant Messaging (IM) such as creating a group chat (where possible) would have allowed for more direct communications with stakeholders. This could have potentially increased speed of response and participation rates.

Recommendations for digital transformation

Develop existing technological capabilities within organisation

In the face of digital transformation, it is important to begin considering the development of existing technological capabilities within an organisation. For instance, EBMOs can leverage on Millennials and Gen Z employees due to their unique characteristics that can be utilised to drive digital transformation in the organisation. In general, Millennials and Gen Z grew up with technology and the internet, and are more familiar with digital platforms. Such digital natives have low barriers to learning new technology where they are associated with faster speed of adaptation. Similarly, younger generations tend to intuitively understand the mechanisms and workings of new software and other digital processes.

In the case of ECOP, older staff faced more difficulties adapting to the process of digitalisation due to the pandemic. However, younger staff were passionate and willing to learn and explore the various digital platforms introduced to them. This mindset paired with assistance from the younger staff encouraged older staff to learn and slowly transition to digital processes.

In addition, organisations can develop existing technological capabilities by identifying and developing necessary skills through workplace learning, which does not need to incur high costs. For example, EBMOs can reserve and allocate a fixed amount of time for staff self-directed learning and reporting on a weekly basis. Another example would be setting aside half a day every Friday to find and test new softwares or develop technological capabilities; or assigning 1 hour for self-directed learning and exploration, and the next hour for reporting and sharing with team members weekly.

EBMOs can also build communities of learning within the organisation and reach out to member organisations once capabilities have been developed. These learning communities would create a culture of collaboration, encouraging lifelong learning, and develop innovative and forward-thinking mindsets in the EBMO and at the broader scale. These characteristics can help EBMOs network and keep existing members engaged as well as upskill employees through the sharings and learning resources accumulated over time.

However, to build communities of learning within EBMOs during challenging times, it is important to complement it with suitable technology. For instance, finding the right platform for video calls, sharing asynchronous activities, and recording and transferring knowledge with other members.

Reviewing internal policies and mindsets

The key to driving digital transformation in an organisation is through its culture. Adopting a digital culture refers to the collective mindset employees adopt to effectively incorporate digitalisation into their work. Although building an organisational culture that supports digitalisation is crucial, it may

take some time to change as it must be integrated and aligned to the organisation's strategy and structure, for example, through internal policies.

This can be achieved by finding the right team of individuals sharing a common vision and goal, identifying the right human capital, and providing development opportunities to fully maximise individual potential. A digital culture can incorporate visions such as:

1. Placing the customers' needs first (i.e. Customer Journey Mapping)
2. Supporting individual judgement & decision-making (i.e. Guiding Principles instead of SOPs, Mentoring and Reflection-based practices)
3. Embrace innovation and change (i.e. Fail fast, learn fast, Minimum Viable Product)
4. Emphasize speed over perfection (i.e. Agile, Scrum sprints, Kanban)
5. Collaborate with the best (i.e. Cross-functional teams, Seamless information sharing, High interaction)

Various internal policies can be implemented in the face of digital transformation to support the development of the right culture. This can include articulating the change needed from the status quo to the desired state, involving leadership to engage and motivate staff, and reinforcing desired behaviours via policy and programmes.

Policies also need to include considerations for risk management and data governance structures when technology is involved, as technology adoption may create or expose vulnerabilities in the organisation if left unmanaged. These policies need to include assessing, monitoring, and controlling the potential risks of adopting new technologies via structures and processes. Implementing policies may take less time than culture change, but must be supported by the organisational culture to be successfully adopted by the organisation.

Low cost or free solutions

In the short run, due to the business challenges posed by Covid as well as countries increasingly going into recession, ASEAN EBMOs have less resources to embark on digitalisation. Due to such circumstances, it would be helpful to explore low cost or free solutions.

EBMOs can utilise social media and chat applications as well as other free tools available online in the country for engagement. For instance, Facebook, LinkedIn and Instagram can be used to keep potential and existing members updated on future events and provide a platform for responding to feedback and queries. Similarly, social media interaction platforms such as TikTok can be used to provide a behind-the-scenes look on the EBMOs industry and provide insight and engagement to potential and existing members. This can expand the EBMOs audience for the new trend of video marketing and increase the reach of further engagement through branded hashtags or similar Search Engine Marketing (SEM) strategies which essentially are free.

There are also multiple free training tools and platforms that have been used more frequently during the pandemic. These include Google Meets, Zoom, Microsoft Teams etc for video calls; Mural for facilitated activities and group brainstorming; Kahoot and Mentimeter for interactive quizzes; and YouTube for curating and communicating information in a visual format. In addition, there are also free app building platforms available that can assist in authoring and delivering bite-sized learning content such as EdApp which can facilitate delivery and application of remote learning utilising existing software such as PowerPoint and Google Slides.

Similarly, with regards to data analytics, there are a number of free data analytics tools that can be used to process large volumes of data to generate insights. For example, EBMOs can switch to using Google Sheets rather than buying a Microsoft licence, and take advantage of compatible free data visualisation add-ons such as Tableau, PowerBI, Google Data Studio to translate findings into charts easily to generate insights and applications. There are also a multitude of other free add-ons that can perform many functions from linking multiple sheets and conducting data validation (i.e. Robotic Process Automation), to automating emails and responses, to accessing public data libraries and big data to facilitate decision making.

However, it is of paramount importance that EBMOs conduct internal checks to ensure the adopted digital tools meet security standards and are used in a way that does not expose the organisation to digital threats or risks.

Funding support

When faced with limited infrastructure and cost, identifying supporting funding opportunities would be beneficial for EBMOs. These opportunities can include NGOs (i.e., ILO), local government initiatives, or other local or international support communities. For instance, ILO efforts include supporting purchase of licenses to ECOP for usage of Qualtrics, a survey administration and analysis platform, among other forms of more direct funding. Initially, ECOP relied on pen and paper then transitioned to Google Forms for survey administration and are now using Qualtrics. This is also used for the collection of training and development survey results and training evaluation forms.

Another ILO initiative revolves around the large ASEAN wide LMS - ITCILO eCampus platform that aims to support capabilities development initiatives across ECOP, CAMFEBA, and VCCI. Due to the challenges presented by the pandemic, ECOP launched the eCampus platform advancing towards digital technology, online services, and e-training. This provided ECOP with a competitive advantage that allowed them to set new trends with competitors and members. This initiative also allowed ECOP to diversify their revenue streams and keep members engaged.

Correspondingly, CAMFEBA is also engaging in ongoing efforts towards incorporating online and blended training programmes by leveraging a tailor made LMS. This dedicated LMS, the eCampus, features an online messaging system as well as a self-paced learning system platform. The eCampus' programmes are targeted to lead to additional revenue, service expansion and development, membership retention and recruitment, enhanced recognition in e-learning, and policy recognition.

VCCI's ongoing efforts towards creating digital delivery of services and member engagement is equivalent to CAMFEBA's eCampus platform. It will also be a platform of learning materials that can support online and face-to-face programmes. This initiative will also increase the quality of training programmes provided by VCCI and CAMFEBA. The prior existence of a LMS system that is compatible with the ITCILO eCampus platform would increase the possibility for collaborations between EBMOs and the ILO regarding developing learning products in Vietnam and Cambodia; hence, other ILO projects operating in these countries could utilise this opportunity to develop their own training capabilities and develop a shared pool of resources as well.

Conclusion

Digitalisation is becoming essential to businesses who not just want to survive but thrive in the current uncertain times. The purpose of the study was to understand ASEAN Employers' and Business Membership Organizations' (EBMO's) digitalisation capacity, readiness, and applications in the following five dimensions:

1. Membership engagement
2. Online and social platforms presence
3. Processes and delivery (internal and external)
4. Training provision
5. Staff digital literacy / proficiency

The largest gap scores were identified for Training Provision followed by Member Engagement, which was also congruent with sharings during interviews.

The breakdown of gap areas identified for each dimension was as follows:

Dimension	Gap Areas Identified
Membership engagement	- Events - Exclusive Member Benefits - Community Content Creation - Community Content Contribution
Online and social platforms presence	- Social Media Interaction - Social Media Sharing
Processes and delivery (internal and external)	- Finance - Human Resource - Content Management - Productivity / Tasks Management - Intranet
Training provision	- Learning Management System - Content Authoring System
Staff digital literacy / proficiency	- Digital tools are seen as an obstacle/hindrance to company performance - Digital skills are measured as a performance indicator - My organization develops staff's digital skills

Table 3. Summary of Gap Areas identified across 5 Dimensions of Digitalisation.

Findings indicated that while most EBMOs were keen to embark on digitalisation, however cost, manpower capability, and security concerns were three main factors that deterred ASEAN EBMOs from embarking on the digitalisation journey.

Other factors that were of concern included limited digital infrastructure at the national level (i.e. poor network coverage and speed), resistance towards digitalisation efforts from member organisations (i.e. some prefer physical rather than virtual programmes), and reliance on a few select key staff who were digitally-savvy for majority of digitalisation efforts.

Hence recommendations to support digitalisation efforts for EBMOs include developing technological capabilities within the organisation, which can range from providing funding for purchase of licenses, to providing software itself, and training for software usage. Policy review is also necessary to provide the structures to guide digital usage and applications within the organisation in a secure manner, as well as organisational culture mindset change to persuade staff to embrace digitalisation and reduce the barriers to learning new technologies and processes. The last recommendation would be to use low cost or free options available on the public domain currently, but that can only be done if the EBMO has robust policies that will prevent such free alternatives from being misused or becoming a security risk to the organisation.

Annexes

Annex A - ILO EBMO Survey Questionnaire

Annex B - Survey Data Export__EBMOs' digitalisation capacity, readiness and applications

Annex C - ILO Invitation Email

Annex D - ILO Interview Questions & Responses

Appendix

Appendix A - List of Images Tables Diagrams