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Mapping Study on measuring the economic impact of COVID-19 on the sport sector in the EU

Final report

Sport

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E-mail: Eac-sport@*ec.europa.eu*

European Commission
B-1049 Brussels

Mapping study on measuring the economic impact of COVID-19 on the sport sector in the EU

A report to the European Commission

Final report

Written by Ecorys and SportsEconAustria (SpEA)

Directorate-General for Education, Youth, Sport and Culture

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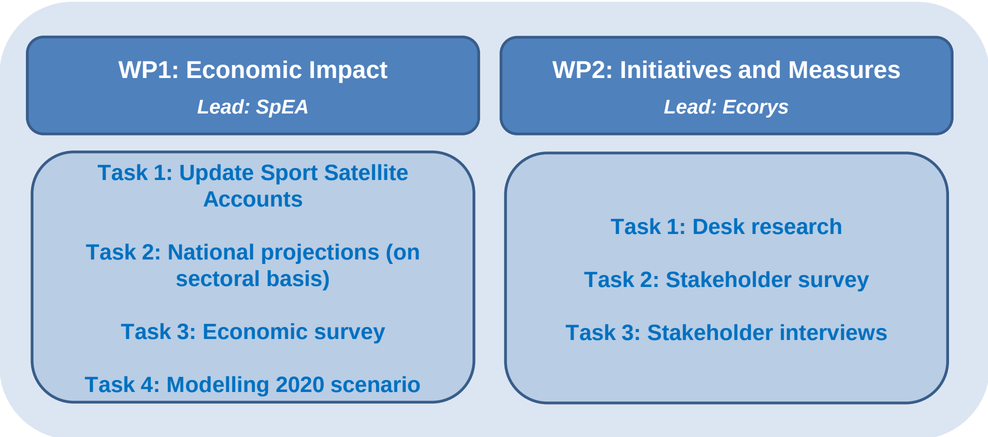
Executive summary

The Directorate-General for Education, Youth, Sport and Culture (DG EAC) of the European Commission commissioned Ecorys in June 2020, together with SportsEconAustria (SpEA), to undertake a mapping study on measuring the economic impact of COVID-19 on the sport sector in the European Union (EU).

The key aims of this study were to support evidence-based policy making at both national and EU level, and to help the sport and public sector tackle and mitigate the socio-economic consequences of the pandemic on the sport industry.

The study comprised of two separate, but concurrent work packages (WP) as outlined in the following figure.

Executive summary figure 1: Study methodology



The Economic Impact work package (WP1) was designed to quantify the short-term impact of COVID-19 on the sport sector, developing a model for 2020 with COVID not occurring (the reference scenario) and then comparing this to models for 2020 with COVID occurring (based on three different scenarios covering varying levels of the pandemic and response).

This work package consisted of four separate tasks. The initial task (Task 1) involved updating the individual Sport Satellite Accounts (SSAs) for the EU-28 (and EU-27) for 2020, showing the direct contribution of the sector to Gross Value Added (GVA), Gross Domestic Product (GDP) and the direct effects on the labour market across the core, narrow and broad Vilnius definitions of sport. This provided a reference scenario based on there being no COVID-19 which would be used to compare to alternative scenarios in Task 4. Task 2 provided national and sectoral estimates of the effect of COVID-19 on the sport economy, based on monthly calculations and incorporating different scenarios of COVID-19 impact. An online survey of relevant stakeholders (Task 3) was then conducted to capture detail on the impact of COVID-19 on specific organisations, enabling these to be linked to the other tasks in this work package. The survey was sent to 142 organisations, with each being asked to complete the survey and cascade to other relevant organisations in their networks. In total, 148 surveys could be used (104 full complete and 44 mostly complete).

The final task (Task 4) involved modelling the 2020 situation with COVID-19 occurring, providing three models based on different levels of impact and differentiating between effects driven by final demand (e.g. the absence of sport-related tourists) and final supply (e.g. sport events not occurring). This included, as in Task 2, assessing the contribution of sport to GVA, GDP and employment across the three Vilnius sport definitions.

Comparison of the three 2020 models to reference scenario in Task 1 allowed the direct and indirect effects of COVID-19 to be assessed at EU, national and sectoral levels. Direct effects include any effects immediately created as a result of an organisation's operations, potentially including spend on the organisation itself and employees in persons as well as inputs via those paying for goods and services. Total effects include both direct and indirect effects, including those that arise in the upstream value chain.

As an example, you need a construction company to build a football stadium. The effects in this company (paying salaries, making profits, etc.) are the direct effects. The construction also requires land, building materials, electricity, goals etc., which the company has to buy. Buying those products and services stimulates final demand elsewhere, for example in real estate and the building materials, electricity and sporting goods industries, which in turn require further inputs through the rest of the value chain. Those effects in the upstream value chains are called the indirect effects. The total effects of building a stadium are therefore the sum of direct and indirect effects.

The following table summarises the economic impact of the sport section in the EU-28 (including the UK) for 2012 and in the EU-28 as well as EU-27 for 2020, with the latter using the reference scenario assuming no COVID-19 pandemic. Values are shown for the direct effects for the broad Vilnius definition of sport. Including the UK for 2020 allows the results of this study to be compared directly to those of SpEA and SIRC (2018)[1] which was based on 2012 data for the EU-28 (including Croatia, although they joined the EU in 2013). This also acknowledges the role of the UK in being the first country to produce a SSA and the leading role they have taken in collaborative work to develop SSAs in the EU.

[1] *Study on the Economic Impact of Sport through Sport Satellite Accounts*. Available at: https://op.europa.eu/en/publication-detail/-/publication/865ef44c-5ca1-11e8-ab41-01aa75ed71a1/language-en/format-PDF/source-71256399

Executive summary table 1: Economic impact of the sport sector, 2012 and 2020

EU level		Sport-related GPD		Sport-related employment	
	Year	Million Euros	Percentage of sport-related GDP	Million employees in persons	Percentage of sport-related employment
EU-28	2012	279,697	2.12%	5.67	2.72%
EU-28	2020 (Reference scenario)	363,390	2.15%	6.46	2.84%
EU-27	2020 (Reference scenario)	310,679	2.16%	5.22	2.67%

Source: SpEA/SIRC (2018), SpEA, 2020

The Initiatives and Measures work package (WP2) had three separate tasks. The initial task (Task 1) involved a comprehensive desk research stage, incorporating searches of the Internet, online focus groups and publications. Desk research took place throughout the study, incorporating material provided via organisations taking part in other tasks in both work packages.

Task 2 involved an online survey of relevant stakeholders, covering their awareness of measures and initiatives, details on what each measure involved, and their perceived effectiveness. The survey was sent to 193 organisations with, as in the economic survey (WP1, Task 3), each asked to cascade as appropriate across their networks. This resulted in 115 fully completed surveys. The final task involved 20 interviews with key stakeholders to provide specific detail on key measures or initiatives, to understand the mechanisms by which they were implemented, barriers/facilitators and critical success factors. Throughout all three tasks, details of relevant measures were incorporated into a detailed measures map, allowing commonalities and gaps to be identified and key information recorded against a variety of criteria.

Key findings and lessons

The data in this report suggests that the sport sector will be considerably affected during 2020 due to the current pandemic. This is largely the case regardless of the extent of COVID-19 measures that are taken, although negative effects increase in line with increasingly stringent imposition of measures (with greatest effect in the higher scenario). Results for each scenario across the sport sector in the EU-28 and EU-27 for 2020 are summarised in the following table (direct effects, broad definition):

Executive summary table 2: Impact of COVID-19 on the sport sector, 2020

EU level	Scenario	Sport-related GPD		Sport-related employment	
		Million Euros	Percentage of sport-related GDP	Employees in persons	Percentage of sport-related employment
EU-28	Higher	56,930	15.7%	1,099,526	17.0%
	Medium	49,635	13.7%	961,997	14.9%
	Lower	45,596	12.5%	883,912	13.7%
EU-27	Higher	47,430	15.3%	844,773	16.2%
	Medium	41,404	13.3%	740,529	14.2%
	Lower	38,100	12.3%	681,588	13.0%

In the EU-28, the impact of COVID-19 across the sport sector under the higher scenario (potentially the most likely scenario at present) in 2020 is estimated at:

- 56,930 million Euros GDP (differs by 15.7% compared to the reference scenario)
- 1,099,526 employees in persons (differs by 17% compared to the reference scenario)

In the EU-27, the impact of COVID-19 across the sport sector under the higher scenario (potentially the most likely scenario at present) in 2020 is estimated at:

- 47,430 million Euros GDP (differs by 15.3% compared to the reference scenario)
- 844,773 employees in persons (differs by 16.2% compared to the reference scenario)

Member States are affected differently, depending on the scale of their economy and sport sector. All Member States (except for Czechia) are estimated to see their share of sport-related GDP decline by at least 10% in 2020 under a 'higher' scenario of more stringent measures. Economic estimates suggest Germany has a particularly substantial absolute reduction in GDP and employment (compared to a no-COVID scenario), with any difference there accounting for almost half the difference estimated at an EU level. France, Italy, Spain, and Austria (where the sector makes up a particularly large part of the overall economy) are also suggested to have substantial decreases. Other countries, primarily the Baltic States, have smaller overall sport economies compared to those of larger Member States but data shows a large relative difference at a total level due mainly to their wider dependence on other countries in their supply chain.

The impact of COVID-19 varies considerably across sport sectors, with travel restrictions, retail and sport facilities closures facing a widespread impact. Sporting services (namely clubs and facilities) and accommodation are most affected by COVID-19, with water and air transport also notably affected.

The main theme across stakeholders was the immediate and continuing impact of the pandemic across the sport sector, and the widespread consequences for sport bodies. Financial situations were immediately difficult when the pandemic began, with clear drops in revenue while many monetary obligations still had to be met. As a result, initiatives or measures providing direct, immediate financial support were perceived to be vital, primarily via new grants or funds or extending existing similar provision, although any financial support would be welcomed.

Stakeholders generally wanted to be aware of different initiatives and measures across the EU, understand what was working or not, and be able to prove the value of their sport sector, helping establish broader links with public health, the green agenda and other relevant sectors. Comprehensive coordinated work across the sport sector and other sectors was seen as particularly important.

A further consideration was the need for coordinated work across sport organisations and Member States to alleviate financial concerns in the short-term and strengthen the role of the sector in the long-term. There was a connected recognition of the breadth of the sport sector and the resultant need to ensure all types of organisation are supported and involved, including, but not limited to, grassroots and smaller bodies.

Recommended next steps for the Commission are focused on supporting across the sector to deliver immediate support while providing foundations for long-term growth. These include recommendations to leverage financial support, including raising awareness of funds or other finance options; disseminating clear financial information on the economic contribution of sport and the impact of COVID-19; and ensuring Erasmus+ takes account of grantees needs during the pandemic. The potential for planning should be investigated, including a coordinated EU plan covering the recovery phase, EU-27 sport event planning, and helping establish cross-sectoral links with other relevant sectors. Information sharing and dissemination should be facilitated as much as possible, with digital delivery or models encouraged where this can increase 'real life' participation.

1. Introduction

This section outlines the strategic and policy context; the aims and objectives of the study; the methodology used; and the overall structure of the report.

1.1. Strategic and policy context

This section details the high-level policy context of the study, providing an overview of the situation and main policy developments at the start of the project.

Impact of COVID-19 across the EU

The current global COVID-19 pandemic is occurring with varying intensity globally, across the EU and within individual nations. Mortality levels have risen substantially, affecting individuals, families, and communities across the world. In addition to the rising mortality rate, there have been restrictions on the personal freedom of individual citizens, with an immense impact on public life and economic damage amounting to billions of euros. The most recent figures and projection across Europe showed a sudden recession in the first half of 2020, with the euro area economy "forecast to contract by about 8¾% in 2020 before recovering at an annual growth rate of 6% next year".[2]

Just as the intensity of the pandemic varies globally, so too does the degree to which it affects different regions and sectors at the national level. Quarter one GDP data showed expansion in four Member States, with declines in the others, particularly in France, Italy and Spain (all around 5% decline). These were mainly due to the different approaches taken to lockdown and the different economies across countries, primarily as a result of the greater impact on tourism and services that depended on individual person-to-person contact.[3]

Impact of COVID-19 on the sport sector

As acknowledged by the need for this project, economic analysis has not yet been undertaken to assess the impact of the pandemic on the sport sector. Lockdown measures, other restrictions and the pandemic itself will most likely impact considerably on the sport sector as a whole. With there being several different ways that the sport sector can be affected by the current pandemic, it is likely that different sub-sectors will be affected to varying extents, albeit all being affected at some level. As COVID-19 has had a widespread impact across the economy of Member States there are a variety of ways that organisers, federations, clubs, athletes, local grassroots sport clubs, associations, coaches and other employees have already been affected or may be affected in the future.

Data presented later in this report (work package 2) provide clear information on the impact of COVID-19 across the sector, including for the Vilnius sport definitions and considering different types of impact. Prior to this, initial data at the start of the project suggested various different ways that COVID-19 might affect the sector, the following list which provides an initial snapshot of some potential impacts at that stage rather than a fully definitive outline:

[2] *European Economic Forecast: Summer 2020 (Interim)*. Available at: https://ec.europa.eu/info/sites/info/files/economy-finance/ip132_en.pdf

[3] Ibid

- **Broad economic changes**: the wider economic changes were likely to impact on the economic situation of the sport industry in a wide variety of ways. It was likely that demand for goods and services would be reduced due to unemployment, reduced working hours and/or fear of infection. Export slumps could arise due to a lack of transport facilities and lower demand. Supply could be considerably affected by lockdown and social distancing measures affecting employment across the sector both in the short and long-term.

- **Reduced governmental income**: reduced tax intake and increased fiscal measures to deal directly with COVID-19 may affect the amount that can be spent on sport and infrastructure. This was likely to affect organisations differently depending on the national and/or regional approach to financial support adopted by relevant government bodies.

- **Cancellation of events**: resulting in an immediate lack of income and directly affecting the financial situation of sport events, stadia, and tourism. This was likely to affect all levels of sport, including both professional and grassroots levels.

- **Sponsorship money**: initial signs were that this may be reduced in the short and potentially long term due to the economic downturn putting financial pressure on existing sponsors.[4],[5]

- **Member financing**: research suggested this may be affected by wider economic trends, with considerable impact among membership organisations. Individuals may look to save money by stopping memberships or ad-hoc payments to sport organisations. It is possible that this will be affected by the nature of social distancing requirements, with team-based sports being more affected than individual sports.

- **Sport broadcasting**: suggestions were that broadcasting deals may be reduced. Television, radio, and Internet broadcasters may be affected by COVID-19 through reduced income from advertising and from cancelled subscriptions, with reductions in income for sport leagues or clubs following as a result.

- **Sport tourism**: potential impact on sport tourism was widely reported, both because of cancellation of events and the pandemic and associated lockdown measures affecting the ability and/or willingness of individuals to travel and attend events.

- **Production and retail of sporting goods and equipment**: impacted by wider economic trends, such as the closure of production facilities and the retail trade.

[4] *Olympic Lyonnais Reviews Sponsorship Goals in Wake of COVID-19*. Available at: www.sportbusiness.com/news/olympique-lyonnais-reviews-sponsorship-goals-in-wake-of-covid-19/
[5] *Investec to End Sponsorship Deal with England and Great Britain Hockey*. Available at: https://www.insidethegames.biz/articles/1093459/england-hockey-investec

As a result of the likely severe impact of the pandemic across all elements of the sport sector, several measures and initiatives had already been recommended or begun to be implemented. Prior to this research, participant organisations in the SHARE initiative[6] produced a position paper on the impact of COVID-19 on the sport sector, calling for EU and national authorities and sport stakeholders to quickly put in place a range of support measures for the sport sector[7].

Questionnaires had been sent to all Working Party on Sport (WPS) participants across Member States to assess the implications of COVID-19 on the sport sector, to enable cross-national sharing of information. This included accessing full information on the ways that the pandemic may influence the sector, specific measures concerning the sport sector to limit the spread of COVID-19, possible approaches to maintain athlete training and preparation, national and EU measures to support the sector in overcoming negative effects of the pandemic, issues related to the functioning of national federations and sport clubs, steps to restart activity post-pandemic, and examples of the use of EU funds to support the sport sector.

Information from both the position paper and WPS feedback was incorporated where relevant into the measures and initiatives work package two.

1.2. Aims and objectives

The Directorate-General for Education, Youth, Sport and Culture (DG EAC) of the European Commission commissioned Ecorys in June 2020 to undertake a mapping study to measure the economic impact of COVID-19 on the sport sector in the European Union (EU).

The key aims of this study were to support evidence-based policy making at both national and EU level, and to help the sport sector and public sector tackle and mitigate the socio-economic consequences of the pandemic on the sport industry. This was to involve two separate approaches, measuring the economic impact of COVID-19 on the sport sector in the EU, and providing a list of relevant measures and initiatives.

Specific objectives for measuring the economic impact of COVID-19 included to:

- Quantify the short-term impact of COVID-19 on the sport industry.
- Show the severity of the impact on the sport industry, expressed in terms of losses in Gross Value Added (GVA), in Gross Domestic Product (GDP) (if possible) and employment, relative to the importance of sport vis-à-vis the economy as a whole.
- Take account of existing statistical data at EU and national level and from other reliable independent sources.
- Provide a best and worst-case scenario for the length (or second wave) of the current pandemic crisis and how this would translate across relevant indicators.

The economic element of this study was also to include the development of country specific information across different scenarios. These form the country data sheets (see annex two).

[6] *SHARE initiative.* Available at: https://ec.europa.eu/sport/share-initiative_en
[7] *Position Paper on the Impact of the COVID-19 Crisis on the Sport Sector.* Available at: https://euoffice.eurolympic.org/blog/eoc-eu-office-coordinates-multi-stakeholder-covid-19-position-paper-asking-eu-support-sport

The key objective for the list of measures and initiatives was to provide a list of measures and initiatives taken by public and private authorities, including sport organisations, to support the sport sector during the crisis. This was to feed into development of a set of short case studies, each focusing on a separate measure or initiative to provide a broad overview of the range of approaches being implemented at that time. These are contained in annex three.

The sport economy is not generally treated as a separate statistically measured sector, mainly as some elements form a part of various other industries and economic sectors. The Vilnius definition of sport (see annex four) is used as a basis for the analysis in this report. This provides a full categorisation of the sector based on three layers and using a standard classification of economic goods.

1.3. Methodology

This section provides detail on the overall methodology for the study, covering the individual tasks undertaken for the economic analysis (work package 1) and measures and initiatives (work package 2).

Work package 1: Economic analysis

The following sub-sections outline the methodology for each task in the economic analysis, namely the separate work to update Sport Satellite Accounts (SSAs) to provide a 2020 base scenario with no pandemic, develop national projections, conduct the economic survey, and model the 2020 scenario including the pandemic.

These tasks were designed to allow identification of the possible economic impact of COVID-19 through comparing results from the initial (2020 model with no pandemic) and final (2020 model with pandemic) tasks.

Task 1: Update Sport Satellite Accounts

Sport Satellite Accounts (SSAs) or Sport Satellite Systems (SSSs) provide a detailed statistical framework for measuring the economic importance of the sport sector, accounting for elements which would otherwise remain invisible as they are included as part of other sectors. An Input-Output Table (IOT) or a Supply and Use Table are used as core elements of any SSA. This study uses a specific type of IOT known as a Multiregional Input-Output Table for Sport (MR-IOT:S). This is a sector-specific set of data which account for the flow of intermediate goods and services across the EU-28.

An IOT-based SSA allows for direct and indirect (supply network) effects to be calculated. Direct and indirect effects can then be added together to produce data for the total effect. These data were also used to calculate a multiplier, based on the total effects (direct and indirect) divided by the direct effects. For example, a GDP multiplier of 1.50 means that for every euro of GDP generated in directly sport-related companies and institutions, GDP worth another 50 cents is generated in the supply network (indirect effects). In the sections of the report covering the COVID-19 impact, the total effect always includes incoming effects received by a Member State or sector. Multipliers are EU-wide, meaning that if a company in Spain purchases steel from Poland, the GDP can be attributed correctly to the economy where it was generated.

A full explanation of SSAs, IOTs and multipliers (including a worked example) can be found in annex five.

SSAs were accessed for all 28 Member States in MR-IOT:S form, using the most recently available MR-IOT:S. This was then updated to provide extrapolated figures for 2020 assuming no COVID-19 pandemic, using data from Eurostat and National Statistics Offices (NSOs) at a sectoral level using CPA and NACE 2-digit-level (SpEA and SIRC (2018)). Given project timelines, this assumed that there had been no structural changes in the sport economy in the individual countries or in the supply networks between the countries.

A variety of approaches were used to extrapolate from base year 2012 to 2020. Aggregated sectoral data were incorporated where available (generally for up to 2018). Country-wide economic data (generally for up to 2019) were also integrated into the model where this could be accessed. Final 2020 models were developed for each Member State. These included the direct contribution to both GVA and GDP as well as the direct effects on the labour market (head counts) across the core, narrow and broad Vilnius definitions of sport. They also included an input-output analysis covering direct and indirect effects of sport, with the latter covering the effects in the entire upstream GVA chain.

Task 2: National projections (on a sectoral basis)

Analysis was undertaken to provide national and sectoral projections for 2020. These were based on detailed monthly data, dividing 2020 into January to May, and June to December periods. This included effects for both supply-side (for example, stoppages in production, closure of shops or hotels, cancellation of events) and demand-side (for example, lower foreign trade). Three additional elements were taken into consideration, the nature of initial steps undertaken by Member States to address the pandemic, their duration, and their impact on individual sectors.

Following this analysis, a list of policies and their impacts (on sectoral level) was developed for each Member State, with this being included in subsequent analysis.

Task 3: Economic survey

An online survey of relevant stakeholders (Task 3) was conducted. The aim was to support the economic analysis with insights from the field, provide an indication of the current situation in the sport sector, complement the results of the economic analysis, and access additional information that could not easily be found elsewhere (for example share of online sales or membership in a corporate cluster or network). Results are not intended to be representative at a sectoral or a national level.

The survey contained questions covering the type of organisation, financial information for 2019 (sales, costs, profit/loss, employee numbers), impact of COVID-19 on finances in 2020 (sales, personnel costs, profit/loss), and the ability for respondents to outline any potential measures or initiatives.

The six to eight-minute on-line survey was sent to 142 organisations on 19th August, with each being asked to complete the survey and cascade to other relevant organisations in their networks. The initial selected sample included SHARE initiative members, European Week of Sport members, European sport federations, International sport federations, and a variety of other sport organisations.

Organisations or individuals were excluded if they were not businesses (for example, EU Sport Directors were included in the later measures survey but were not part of the sample for the economic survey). The survey closed on 8th September, with 104 fully completed responses being received, and a further 44 respondents answering at least some questions, giving an overall sample of 148 respondents. Since participants were not obliged to answer every question, the final number of responses per question varied.

All respondents were asked to state the type of organisation they were responding on behalf of, with results shown in the following table.

Table 1 Economic survey - organisation type

	Number	Percentage
Sport organisation	74	53%
Company (sport-related only)	36	26%
Other	20	14%
No answer	10	7%
Total sample	*148*	*100%*

Source: Economic Survey (Q1): Which of the following best describes your organisation?

Results showed that around half of all respondents (53%) classified their organisation as a sport organisation, and a quarter (26%) as a general company with activities relating to sport. The remainder provided an 'other' answer (14%) or did not respond to the question (7%).

Participants were also asked to state the location of their organisational headquarters, as outlined in the following table.

Table 2 Economic survey - organisation headquarters

Country	Number	Percentage
Austria	10	7%
Belgium	8	5%
Bulgaria	2	1%
Croatia	2	1%
Cyprus	2	1%
Czechia	4	3%
Denmark	2	1%
Estonia	0	0%
France	6	4%
Finland	2	1%
Germany	16	11%
Greece	3	2%

Hungary	0	0%
Ireland	3	2%
Italy	6	4%
Latvia	1	1%
Lithuania	3	2%
Luxembourg	3	2%
Malta	0	0%
Netherlands	10	7%
Poland	0	0%
Portugal	3	2%
Romania	1	1%
Slovakia	9	6%
Slovenia	0	0%
Spain	8	5%
Sweden	4	3%
Outside EU-27	14	9%
No answer	26	18%
Total sample	148	100%

Source: Economic Survey (Q4): In which country (EU-27) is your organisation's headquarter?

Respondents were from 22 of the 27 EU countries (exceptions being Estonia, Hungary, Malta, Poland and Slovenia) and also seven countries outside the EU. The most common EU Member State headquarters were in Germany (11%), Austria and Netherlands (both 7%).

Task 4: Modelling 2020 scenario

The final task (Task 4) involved modelling the 2020 situation, differentiating between effects driven by final demand (e.g. the absence of sport-related tourists) and final supply (e.g. sport events not occurring). This enabled three separate types of effect to be differentiated: direct effects (for example, closure of gyms), institutions not receiving intermediate goods and services (for example, golf courses not being able to access hired labourers and having to close), and institutions not producing intermediate goods and services (the downstream impacts of any COVID-19 change in provision). Double counting was avoided by using the largest impact identified in the analysis.

Final 2020 models incorporating the impact of COVID-19 were developed following this analysis, showing the contribution of sport to GVA, GDP and employment both directly and indirectly for the three Vilnius definitions of sport. This included comparative data to outline the importance of sport vis-à-vis the economy.

The impact of COVID-19 was then assessed by developing three separate scenarios, comparing the reference scenario of COVID-19 not occurring (task 1) to a higher, medium and lower scenario respectively to account for different levels of potential impact in 2020 as a result of the pandemic. This included calculation of the direct and indirect effects traceable to COVID-19 for the EU, at the national level and at the sectoral level of each Member State.

Work package 2: Measures and initiatives

The following sub-sections outline in detail the methodology used for each task in the measures and initiatives work package, namely the separate desk research, measures survey, and measures interviews.

Task 1: Desk research

Desk research was conducted at the initial stage of the project to establish an initial 'measures map' of relevant measures and initiatives that were being implemented in Member States. Initial results were also used to feed into development of the research tools and sample frame for the members survey and interviews, with the desk research continuing throughout the project to ensure a comprehensive measures map was developed. This task involved Internet searches, and analysis of information posted on the EU Platform for Sport Yammer group and in various documents provided directly by stakeholders either directly to Ecorys or as part of the economic and measures surveys or interviews.

Task 2: Measures survey

The measures survey was developed to provide an overview of measures or initiatives that were being developed or implemented across Member States. It was intended to provide an overview of the range of different measures and initial insight into how stakeholders felt these had worked. Relevant measures were included on the 'measures map', with additional desk research being conducted on each as required. It was not intended to provide a quantifiable assessment of the prevalence of different measures or their perceived effectiveness.

A ten-minute online survey was developed for stakeholders to provide information on measures and initiatives. This included questions covering details of the organisation (name, type, location), measures and initiatives (awareness, whether in place, perceived effectiveness, additional information), and a final question on the perceived impact of COVID-19 on sport and possible mitigating actions.

The survey was initially sent to 193 organisations or individuals. These included EU Sport Directors, SHARE initiative members, European Week of Sport members, European sport federations, International sport federations, and a variety of other sport organisations. Each survey recipient was asked to complete the survey and forward an Internet link to the survey to other relevant organisations in their network.

The survey was launched on 17th August and closed on 11th September, with 115 fully completed responses being received, with these being split across type of organisation as follows based on the 113 respondents providing details in response to this question.

Table 3 Measures survey - organisation type

	Number	Percentage
National sport federation	32	28%
Non-governmental organisation	26	23%
National, regional, local government	23	20%
European sport federation	9	8%
National Olympic committee	4	4%
Academic, private, other	19	17%
TOTAL	113	100%

Source: Measures survey (Q2): Which of the following best describes your organisation? (Single code only)

The most common types of organisation that respondents worked for were national sport federations (28%), non-governmental organisations (23%) and national, regional or local government (20%). A smaller proportion worked for European sport federations (8%) or national Olympic committees (4%), with just under a fifth (17%) being part of an academic or other type of organisation.

There was a broad spread of organisations in terms of the countries in which respondents said their organisation was based. Most common were the Czechia (14%) and Italy (12%), Ireland (9%) and Belgium (8%). No other country had the headquarters for more than 5% of those responding to this question.

Respondents were also asked to state both the total and main sport areas they worked in from a pre-coded list of all Vilnius definitions. Results are outlined in the following table for the main area, therefore showing the primary focus of those taking part in the survey.

Table 4 Measures survey - main area worked in

	Number	Percentage
Core Vilnius definition	52	46%
Broad Vilnius definition	8	7%
Narrow Vilnius definition	3	3%
Other/none of the above	47	42%
No response	3	3%
Base: Total sample	*(113)*	*(113)*

Source: Measures survey (Q4): And which from the areas you've listed is the main area your organisation works in? (Single code only)

Responses showed the most common response was that organisations were within the core Vilnius definition (46%), with considerably smaller proportions in the broad (7%) and narrow (3%) categories. A large proportion (42%) stated they did not fit in these definitions or were another type of organisation, largely as these were general organisations with work across the Vilnius categories, such as governments or academic bodies.

Task 3: Measures interviews and expert panel

Task three involved the completion of 20 interviews with key stakeholders, with these taking place between 9th September and 8th October. A purposive approach was taken to sampling, using the measures map to identify specific measures or initiatives that were relevant or highlighted potential promising practice and relevant stakeholders with experience of that measure. While no specific quotas were set, the spread of interviews aimed to cover a range of measures, and to involve stakeholders from across Member States and representing different types of organisation.

Interviews lasted around 45 minutes and covered the nature and approach to implementation, barriers/facilitators and critical success factors, potential transferability and sustainability, and additional potential measures.

Following this, an extra stage was undertaken to provide additional detail, recontacting interviewees for further feedback and contacting any relevant new leads. In total, three additional mini interviews were conducted, and four additional e-mail clarification discussions took place.

The 'measures map' was then finalised, incorporating all relevant measures across work packages and tasks, deduplicating responses as required.

An expert panel was comprised consisting of representatives from the European Olympic Committee, Federation of European Sporting Goods Industry, KEA, and the Ministry of Sport in France. The panel took part in a workshop and provided additional feedback to finalise recommendations for the report.

1.4. Report structure

The remainder of this report is structured as follows:

- Section two outlines the results of the economic analysis.
- Section three details the measures and initiatives currently being implemented.
- Section four covers potential additional steps that could be implemented.
- Section five provides a set of conclusions and recommendations.

Several annexes are included as follows:

- Annex one: sources.
- Annex two: country data sheets.
- Annex three: case studies.
- Annex four: Vilnius definition of sport.
- Annex five: Sport Satellite Accounts with Input-Output Table.
- Annex six: direct GDP EU map.
- Annex seven: sectoral comparison table.
- Annex eight: measures and initiatives table.

2. WORK PACKAGE ONE: ECONOMIC ANALYSIS

This section outlines the economic analysis work package in detail, covering each of the specific tasks in full, culminating in sections outlining the different effects on the sport sector in each of the three COVID-19 scenarios.

2.1 Economic impact of the sport sector in the EU for 2020 (reference scenario)

This section provides a reference scenario to show the estimated economic situation of the sport sector in 2020 taking a hypothetical assumption that there was no COVID-19 pandemic. As this approach involves taking existing data for 2020 and using this to provide estimated figures for the whole year it is not a regular SSA (as these standardly use only actually existing data rather than estimates).

The model used for each scenario is based on the MR-IOT:S which was developed as part of the earlier "Study on the Economic Impact of Sport through Sport Satellite Accounts"[8]. The original model featured the EU-28 of 2012. In order to update the numbers to 2020, the most recent Input-Output Tables were accessed via Eurostat and updated to account for any change and to include updated SSAs for countries where new data were available (Belgium and Croatia).[9]

The approach adopted throughout this analysis used Gross Domestic Product (GDP) as opposed to Gross Value Added (GVA). GDP differs from GVA as it includes not just the value of the final goods or services but also any additional taxes, subsidies, or other requirements. Using GDP therefore includes consumption level data as opposed to only production as in a GVA approach. While the first[10] pan-EU study on the economic impact of sport on the EU used GVA, the second[11] used GDP.

Table 5 provides full details for the reference scenario, namely 2020 data under the assumption that no COVID-19 crisis occurred. As an example, the table shows estimated 2020 GDP in Belgium of 7,944 million Euros (1.63% of total GDP) and 90,446 employees in persons (1.88% of total employment). A map showing the direct GPD figures is included in annex six).

[8] https://op.europa.eu/en/publication-detail/-/publication/865ef44c-5ca1-11e8-ab41-01aa75ed71a1/language-en/format-PDF/source-71256399

[9] Although the final SSA of Croatia was not available, additional information for this Member State was used where available.

[10] https://op.europa.eu/en/publication-detail/-/publication/5da6b1f7-bc27-4bd5-9ed0-cba97a08b433

[11] https://op.europa.eu/en/publication-detail/-/publication/865ef44c-5ca1-11e8-ab41-01aa75ed71a1/language-en/format-PDF/source-71256399

Table 5 GDP and employment, 2020. Reference scenario

	Sport-related GPD				Sport-related employment			
	Million Euros		Share in sport-related GDP		Employees in persons		Share in sport-related employment	
	Direct	Total	Direct	Total	Direct	Total	Direct	Total
AT	17,377	27,061	4.22%	6.58%	237,634	325,429	5.50%	7.53%
BE	7,944	14,876	1.63%	3.06%	90,446	137,692	1.88%	2.86%
BG	627	1,019	0.97%	1.57%	46,394	62,222	1.46%	1.96%
CY	432	693	1.88%	3.02%	9,668	14,005	2.37%	3.43%
CZ	3,220	8,216	1.40%	3.58%	109,227	197,532	2.10%	3.80%
DE	130,085	232,500	3.66%	6.54%	1,965,615	3,089,205	4.74%	7.45%
DK	5,026	8,308	1.56%	2.59%	68,332	96,221	2.44%	3.44%
EE	351	592	1.19%	2.01%	14,801	18,765	2.31%	2.93%
EL	1,754	2,573	0.91%	1.33%	59,658	77,661	1.54%	2.01%
ES	18,132	28,657	1.41%	2.23%	310,706	452,986	1.57%	2.29%
FI	3,950	6,812	1.60%	2.75%	57,945	88,597	2.31%	3.54%
FR	48,371	70,715	1.95%	2.84%	649,429	878,843	2.44%	3.30%
HR	1,379	2,288	2.43%	4.03%	50,874	73,648	3.06%	4.43%
HU	1,959	3,290	1.28%	2.15%	90,728	118,608	2.03%	2.65%
IE	4,238	6,412	1.16%	1.76%	41,481	56,900	1.75%	2.40%
IT	25,508	48,738	1.41%	2.69%	428,446	707,375	1.87%	3.09%
LT	507	787	0.99%	1.54%	25,032	32,702	1.89%	2.47%
LU	1,160	2,209	1.78%	3.39%	4,812	10,634	1.78%	3.93%
LV	290	463	0.92%	1.46%	17,975	23,441	1.34%	1.75%
MT	292	523	2.15%	3.84%	5,738	8,609	2.30%	3.46%
NL	10,287	17,397	1.23%	2.09%	159,808	224,789	2.02%	2.85%
PL	12,686	23,272	2.32%	4.25%	368,377	617,572	2.28%	3.82%
PT	2,484	4,789	1.13%	2.18%	75,081	115,521	1.60%	2.46%
RO	2,562	5,151	1.06%	2.13%	114,305	177,961	1.35%	2.10%
SE	7,935	13,761	1.63%	2.83%	143,020	196,914	2.88%	3.97%
SI	789	1,295	1.60%	2.63%	24,308	32,983	2.50%	3.39%
SK	1,335	2,430	1.35%	2.46%	53,178	73,321	2.07%	2.86%
UK	52,712	95,238	2.04%	3.68%	1,239,586	1,738,704	3.93%	5.51%
EU-27	310,679	534,826	2.16%	3.73%	5,223,018	7,910,136	2.67%	4.04%
EU-28	363,390	630,064	2.15%	3.72%	6,462,604	9,648,840	2.84%	4.24%

Source: SpEA, 2020

EU-28 data for the 2020 no-COVID-19 reference scenario showed:

- Direct sport-related GDP equals 363,390 million (m) Euros or 2.15% of GDP.
- Direct employment in the sport sector equals 6,462,604 persons or 2.84% of all employment in the EU-28.
- Total sport-related GDP (including both direct and indirect via the supply network) is 630,064 million Euros or 3.72% of GDP.
- Total employment in the sport sector equals 9,648,840 persons or 4.24% of all employment in the EU-28.

These direct results in 2020 are similar to those previously reported for the sector[12] in 2018. The minor differences are mainly due to the 2020 figures including more precise data from Belgium and Croatia.

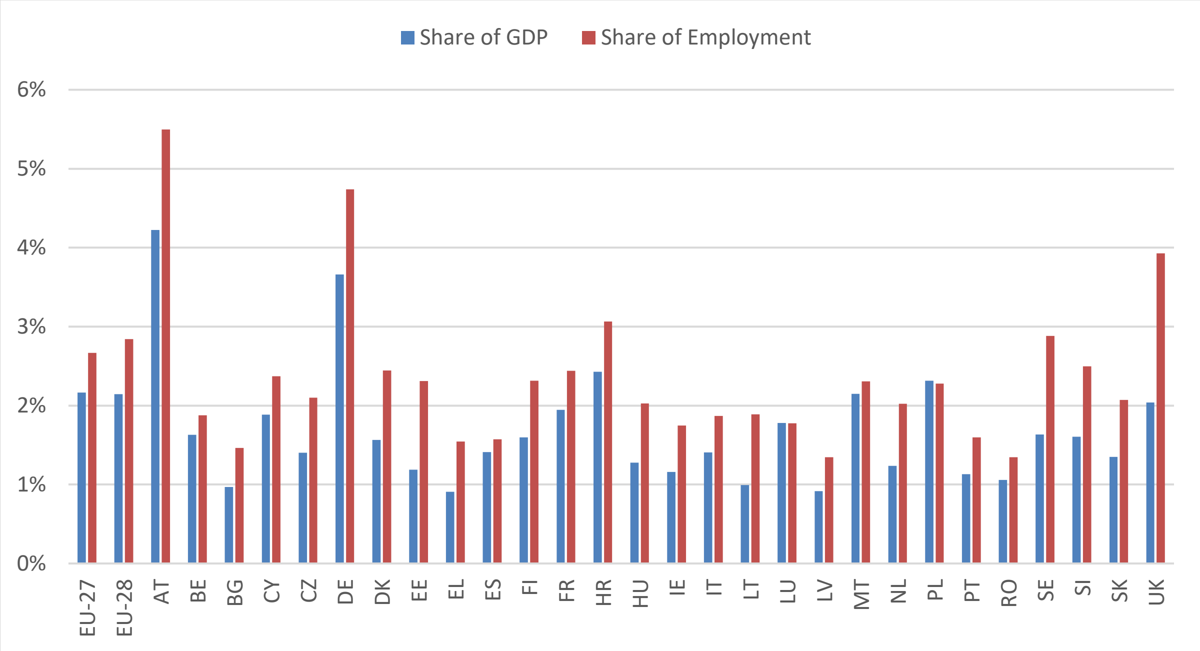
EU-27 data for the 2020 no-COVID-19 reference scenario showed:

- Direct sport-related GDP equals 310,679 million (m) Euros or 2.16% of GDP.
- Direct employment in the sport sector equals 5,223,018 persons or 2.67% of all employment in the EU-27.
- Total sport-related GDP (including both direct and indirect via the supply network) is 534,826 million Euros or 3.73% of GDP.
- Total employment in the sport sector equals 7,910,136 persons or 4.04% of all employment in the EU-27.

The following figure summarises the impact of sport on the national economies in terms of GDP and employment. Values given are direct effects of the broad definition and can be compared directly to those in SpEA and SIRC (2018).

[12] https://op.europa.eu/en/publication-detail/-/publication/865ef44c-5ca1-11e8-ab41-01aa75ed71a1/language-en/format-PDF/source-71256399

Figure 1 Share of direct sport-related economic activity in GDP and employment.



Source: SpEA, 2020

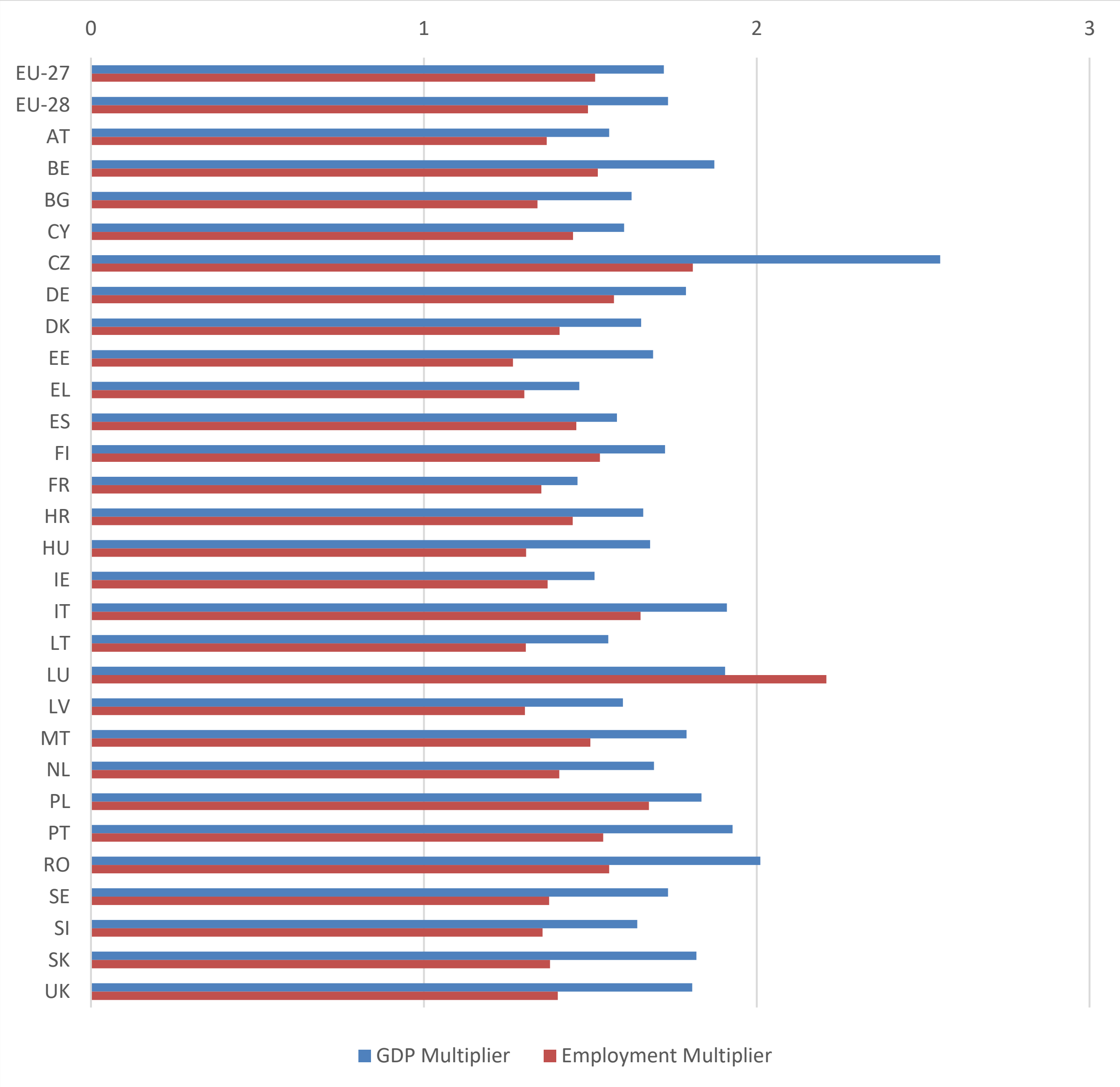
The higher shares of total and direct figures for employment than GDP across the EU suggest that sport is relatively employment-intensive compared to other sectors. There was a similar pattern of higher shares for employment in each individual Member State except for Belgium, Malta, Poland and, to a lesser extent, Romania.

The data in Table 5 also shows the position of different Member States in absolute terms. Germany is the highest ranked Member State with a direct sport-related GDP worth 130,085 million Euros and 1,965,615 employed persons. The United Kingdom is second, with 52,712 million Euros of GDP and 1,239,586 employees in persons. France, Italy, Spain, and Austria follow. The relative size of the sport economy in the reference scenario can be illustrated with the share of direct sport-related GDP data. This shows relatively high figures for Austria (4.22%), Germany (3.66%) and, to a lesser extent, Croatia (2.43%) and Poland (2.32%). This highlights the particular importance of the sector in these Member States.

The different importance of sport in the Member States can be explained by the nature of the sector in each country. As examples, Austria and Croatia are comparatively small economies, but tourism (mainly winter tourism and hiking in Austria and sailing and diving in Croatia) results in a notable influx of foreign money which generates GDP and employment. This results in above average shares of sport in these Member States (4.22% and 2.43% of GDP respectively, compared to 2.16% across the EU). Various other Member States have strengths in certain sub-sectors, meaning their situation in a no-COVID reference scenario and any effect of COVID-19 on the broader sport sector will vary. As examples, Germany (3.66%) and Poland (2.32%) have strong production sectors in sport, while Luxembourg (1.78%) relies predominantly on sport services and facilities and less on other sport-related areas.

Figure 2 shows the multipliers for both GDP and employment in each Member State under the reference scenario. As noted in Section 3.1, these multipliers show the relation of total (direct and indirect) to direct effects for each Member State and the EU-28 and EU-27, illustrating the extent that direct effects are multiplied more broadly in the supply networks.

Figure 2 GDP and employment multipliers. Reference scenario.



Source: SpEA, 2020

The average EU-28-wide GDP multiplier is 1.73, with the employment multiplier being lower at 1.49. This is mainly due to the higher direct employment effects (the multiplier equals the total effect divided by the direct effect). If the direct effect is high, as for employment, the multiplier is low.

GDP and economic multipliers differ considerably across Member States. One reason is the extent that economies are linked to the wider EU-economy. Multipliers are higher where less GDP is generated within the directly sport-related sector and where the economy has greater the ties to the rest of the EU. Multipliers also tend to be higher for economies that rely more than others on intermediate products. As an example, Luxembourg is the only Member State where the multiplier is higher for employment than for GDP, largely due to the size of the country and its reliance on sport services and facilities.

2.2 Policy response in EU countries

This section outlines the policy responses and interventions taken across and within Member States to deal with the pandemic, with this feeding into the overall models used to show the effect of COVID-19 on the sport sector.

The analysis for the models in this report uses the "Corona government response tracker" (OxCGRT[13]) to account for both the length and intensity of any intervention. This tracker provides highly comprehensive datasets from over 150 countries worldwide featuring various indicators which are summarised in four main indices[14],[15]. These indices cover the overall government response; stringency; containment and health; and economic support.

The models in this report use the OxCGRT information most relevant to GDP and the sport economy, namely the overall "stringency index"[16] and the indicator on "public event" prohibition (one of the indicators within the overall stringency index).

Figure 3 contains information from the stringency index, showing the duration and intensity of interventions taken in each Member State and across the EU-28. Monthly information was included from January to August 2020, with additional figures for later periods where available. The relative intensity is shown using a colour coding approach, from green (zero stringency) to red (maximum stringency).

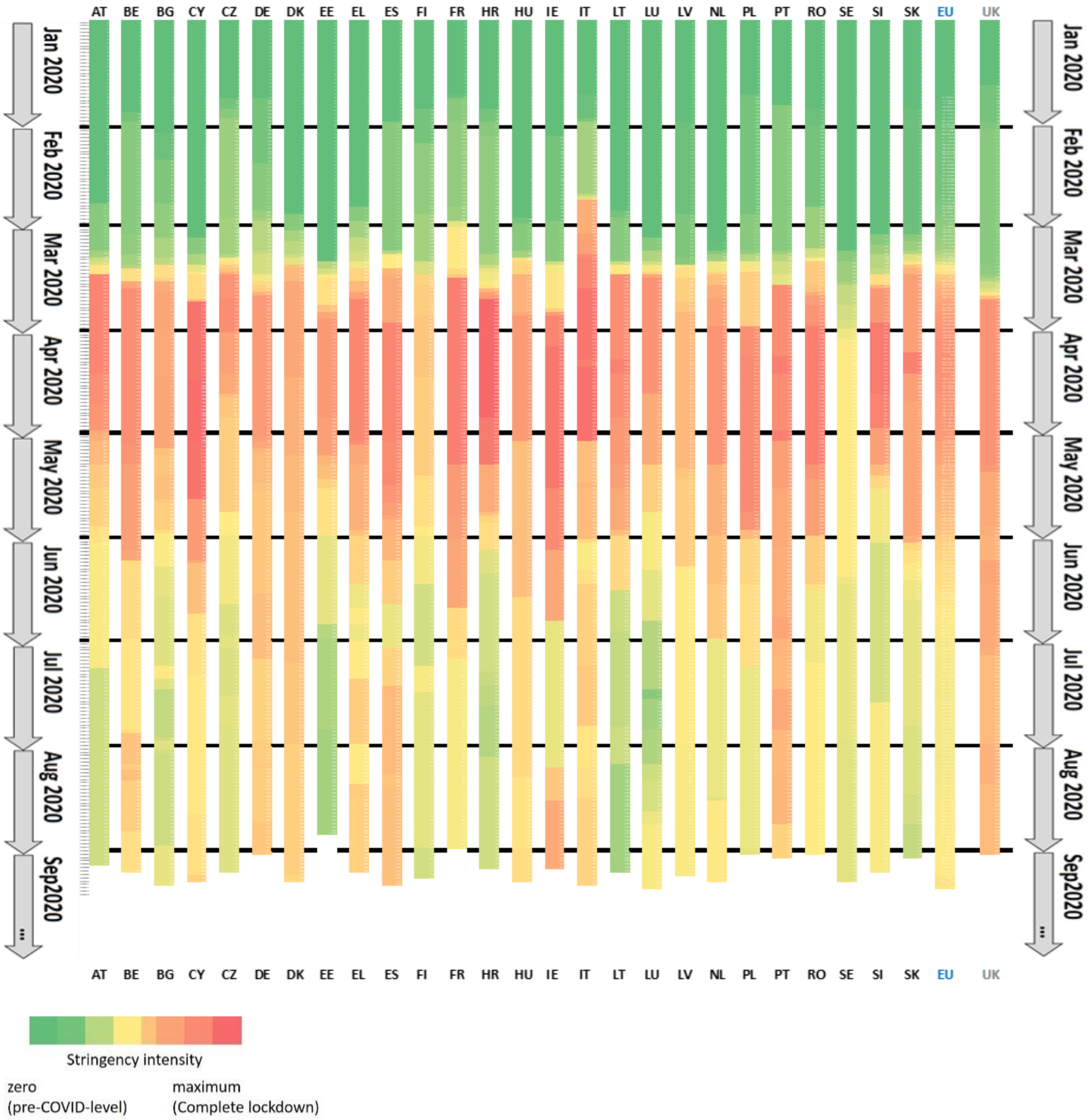
[13] *Coronavirus Government Response Tracker*. Available at: https://www.bsg.ox.ac.uk/research/research-projects/coronavirus-government-response-tracker

[14] OxCGRT has collected information on the level of government responses and aggregated it into four policy indices. Each index is composed of a series of individual policy response indicators, which again are weighed depending on if the policy is general rather than targeted. Each of these indicators was rescaled by their maximum value to create a score between 0 and 100, with a missing value contributing 0.3 These scores were then averaged to get the composite indices.

[15] Hale, T., et al. (2020). *Variation in government responses to COVID-19*. Available at: https://www.bsg.ox.ac.uk/sites/default/files/2020-05/BSG-WP-2020-032-v6.0.pdf

[16] The 9 indicators included being: school closing, workplace closing, cancel public events, restrictions on gatherings, stay at home requirements, restrictions on internal movement, international travel controls, public information campaigns

Figure 3 Duration and intensity of COVID-19 interventions in EU countries



Source: SpEA, 2020.

Original data source: "Corona government response tracker" (OxCGRT[17]), 2020

Results show that most countries moved into a period of high stringency in March 2020, with the exception of the earlier response in Italy, with Member States deciding individually when and which restrictions to set or to lift. As outlined in the OxCGRT database, infection prevalence-based criteria introduced during this initial period differed by country, resulting in different intensities of response. For example, different areas implemented different responses (for example, whether and which students they allowed to return to school) and often had different threshold levels for introducing other measures.

[17] *Coronavirus Government Response Tracker*. Available at: https://www.bsg.ox.ac.uk/research/research-projects/coronavirus-government-response-tracker

Countries generally began loosening restriction measures gradually from April or May. By mid-July, some Member States had begun to reintroduce certain restrictions, largely due to increasing infection numbers. For example, Estonia initially relaxed measures at the end of May but began to re-introduce certain measures subsequently.

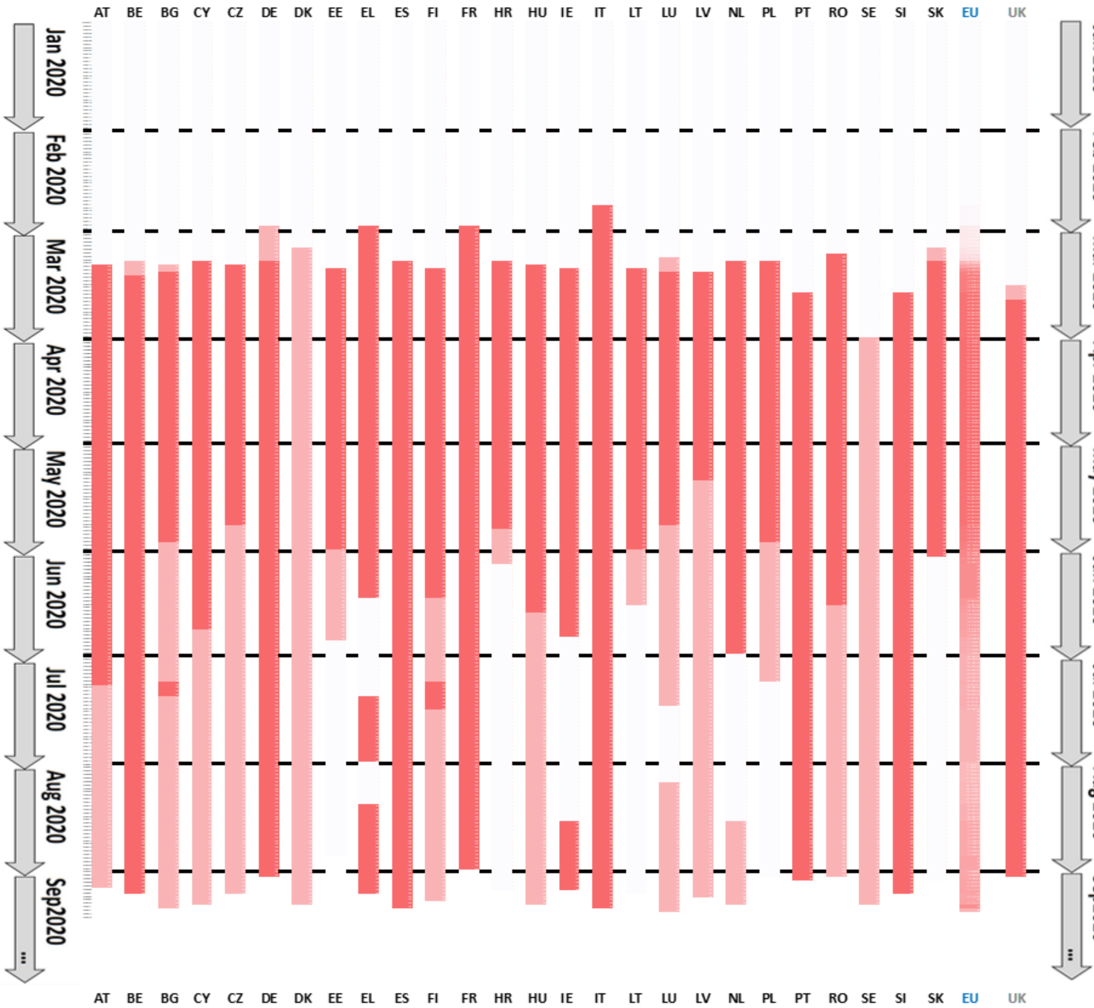
The main difference across Member States was the relatively unique approach taken in Sweden. Sweden initially aimed for 'herd immunity' rather than infection spread prevention, responded comparatively late and with minor restrictions only, still permitting certain public events throughout the entire period. Though shops remained open and public life remained largely normal, COVID-19 still had a considerable effect on Sweden's economy, due largely to output declines in exporting industries as cross-borders value chains were disrupted, and international tourism affected.

Current economic projections suggest an EU-wide real GDP growth forecast of an 8.8% decline in 2020, followed by a 6.5% increase in 2021[18]. In comparison, Sweden's economic growth is expected to fall in 2020 by 5.3% and rebound in 2021 by 3.1%, therefore suggesting both a smaller decline and weaker recovery than across the remainder of the EU-27.

The following figure provides information on the duration and intensity of restrictions specifically focused on public events, illustrating the potential impact on sporting events that were due to be conducted in public during the pandemic period. Information is provided for each Member State and across the EU-28. Monthly information from January to August 2020 is used, with additional figures for later periods where available. The relative intensity is shown using a colour coding approach, either white (no restriction), pink (some events cancelled), or red (most events cancelled).

[18] *European Economic Forecast: Summer 2020 (Interim)*. Available at: https://ec.europa.eu/info/sites/info/files/economy-finance/ip132_en.pdf

Figure 4 Duration and intensity of public event restrictions in EU countries



Source: SpEA, 2020.

Original data source: "Corona government response tracker" (OxCGRT[19]), 2020

This shows a general pattern of Member States cancelling most public events from the start of March 2020, with the main exceptions at this stage being Denmark and Sweden, both of which cancelled only some events throughout the pandemic period to date.

Different approaches were taken following this initial set of cancellations. Some Member States generally began lifting these restrictions in May, but others (Belgium, Germany, and Portugal) largely kept them in place for most public events. Bulgaria and Finland moved across different levels, having separate occasions when most events were cancelled. Some countries set different stringency rules for certain public events, depending on event size, indoor/outdoor events, and other parameters.

[19] *Coronavirus Government Response Tracker*. Available at: https://www.bsg.ox.ac.uk/research/research-projects/coronavirus-government-response-tracker

By August 2020, Croatia, Estonia, Lithuania, Poland and Slovakia had no public event restrictions in place, while Belgium, Greece, Ireland, Italy, Portugal and Slovenia were the Member States still cancelling public events (as was also occurring in the UK).

How does policy stringency relate to economic performance?

The link between policy stringency and economic performance is not straightforward, with there not necessarily being a direct association or correlation between the two. This section compares COVID-19-related restrictions of Member States and UK in 2020 during the period from February to July with economic data on retail trade volumes, with the latter showing one aspect of overall economic performance, which also includes sport-related goods as one of various sub-sectors. As both data sources incorporate monthly information for each Member State, they can be used to provide granular level detail on change over time.

The following table shows the change in retail volume for each Member State and the EU-28 across the first half of 2020. The initial columns show volumes for an individual 2020 month compared to the same month of the previous year, calculated from calendar adjusted figures. For example, retail volumes in Austria in April 2020 were 16.1% lower than in April 2019. The final three columns display summary information for change within 2020, providing crisis-specific data for the following three periods.

- February 2020 to April 2020, providing a general overview from before COVID-19 to the period of strongest lockdown across most Member States.
- April 2020 to July 2020, showing the change from the period of strongest lockdown across most Member States to when implementation of measures was easing.
- February 2020 to July 2020, providing the fullest picture of 'recovery' to date, namely from pre-COVID to implementation measures easing.

As these final columns show data within 2020, they do not take season-dependent change into account (for example, sales of certain sporting or general retail goods may differ by season). As the periods used in each of these final columns is based on the overall picture across Member States they also do not account for the specific pattern of restrictions in each specific country (Member State OxCGRT data provided previously can be used for indicative comparison purposes).

Table 6 Retail trade volume changes (%)

Country	2020 month compared to 2019 month						2020 month		
	Feb	Mar	Apr	May	June	July	Feb-Apr	Apr-Jul	Feb- Jul
AT	4.2	-9.8	-16.1	5.8	2.6	4.9	-17.8	24.8	102.6
BE	2.8	-6.8	-15.6	0.1	6.5	1.3	-18.3	20.0	98.0
BG	9.2	-11.9	-18.9	-21.0	-19.0	-18.7	-21.7	2.2	80.0
CY	8.8	-0.5	-30.7	-5.3	-4.8	-3.6	-32.5	N/A	N/A
CZ	6.2	-3.6	-9.5	0.8	-0.9	2.8	-12.3	N/A	N/A
DE	3.8	1.8	-4.2	8.6	5.0	5.6	-8.4	10.1	100.9
DK	1.0	-3.4	-3.5	5.8	6.9	6.8	-2.8	9.4	106.3
EE	10.6	3.6	-13.6	0.2	4.9	2.9	-17.6	17.8	97.1
EL	3.6	-0.7	-24.5	-4.6	-3.3	-3.0	-24.6	N/A	N/A
ES	2.6	-14.6	-31.5	-20.1	-6.2	-4.8	-31.2	39.0	95.7
FI	4.0	1.9	-0.4	6.7	6.6	5.0	-1.4	3.0	101.5
FR	1.8	-14.2	-30.1	-5.0	1.7	0.4	-31.5	52.2	104.2
HR	5.1	-4.9	-24.9	-7.3	-5.8	-6.0	-27.1	25.5	91.5
HU	16.2	6.8	-9.5	-1.5	1.3	3.6	-14.6	12.8	96.3
IE	-0.5	1.2	-22.1	-12.5	4.2	5.2	-22.0	37.6	107.3
IT	3.4	-21.2	-32.1	-14.6	-5.3	-8.7	-32.1	N/A	N/A
LT	8.6	-3.8	-18.1	-2.6	2.2	5.5	-18.0	25.1	102.5
LU	8.1	-14.7	-37.2	-14.0	-10.3	-8.6	-35.3	50.0	97.1
LV	8.6	1.1	-10.5	-3.7	1.7	2.6	-12.3	12.2	98.4
MT	5.4	-5.0	-23.4	-12.2	-7.9	-9.0	-24.1	19.8	90.9
NL	4.5	1.3	-4.2	5.5	8.2	7.8	-7.1	11.2	103.3
PL	9.7	2.7	-10.9	0.5	2.6	4.4	-15.3	17.6	99.5
PT	8.9	-6.1	-23.2	-15.1	-8.0	-4.7	-27.8	25.6	90.7
RO	13.8	4.3	-19.4	-5.1	1.4	4.3	-24.6	29.2	97.4
SE	4.6	1.2	-4.9	0.0	2.3	3.6	-3.4	4.5	100.9
SI	-1.3	-13.6	-25.9	-13.5	-9.6	-8.5	-19.8	21.6	97.5
SK	6.9	-1.7	-13.2	-7.9	-0.8	2.3	-15.1	16.6	99.0
UK	2.0	-4.4	-23.3	-13.4	-2.9	0.0	-20.3	28.0	100.9
EU28	4.2	-6.4	-17.6	-2.8	1.1	0.9	-19.9	N/A	N/A

Source: Eurostat

This information shows that COVID-19 had a considerable impact on the retail trade across the EU-28. Comparing each initial month in 2020 with the same period in 2019 shows an initial decline in the first period as lockdown measures were implemented, with retail volumes almost a fifth lower (-17.5%) in April 2020 than in April 2019, with a gradual return to 2019 levels (July 2020 volumes 0.9% higher than the same period in the previous year).

A country-specific analysis shows different effects across Member States, with this sometimes being the case even where similar intensities of pandemic response were implemented. As an example, OxCGRT data (Figure 3) records Luxembourg and Bulgaria as having generally similar restriction profiles in terms of intensity and time, with greatest stringency from mid-March to the start of May, prior to a gradual release. However, retail trade data show volumes had recovered considerably more from February to July in Luxembourg (97.1%) than in Bulgaria (80.0%). Luxembourg's retail volumes dropped sharply in the most-affected month (-37.2% in April 2020 compared to April 2019), with subsequent months still below 2019 levels (-14.0, -8.6, -6.7% respectively). In contrast, Bulgaria had a generally higher levels of decline across the period, with retail volumes in individual months from April to July 2020 each showing a drop of around a fifth from the same period in the previous year. This may reflect a granular difference in the nature and type of restrictions implemented or the exact nature of the retail sector in each national economy.

Focus on sport-specific sectors

COVID-19 has had varying effects on different sport-specific sectors, largely dependent on the intensity and duration of restrictions and discipline-specific infection risk. This section provides additional detail on certain sectors, focusing on the largest and/or particularly affected sectors.

Information is provided in the following table on the main effects likely in a given sector, the intensity and duration of effects, and whether they may be affected by regulations in other countries. Effects are categorised as 'strong' where research suggests restrictions generally prohibited sport-related activity entirely and 'moderate' where this appears to have happened to a lesser, but still noticeable extent. For instance, the effect on accommodation and food services is classified as 'strong' due primarily to the likely decline in attendance and tourism due to restrictions on travel and event attendance. Additional information is also provided where possible on perceived duration.

Table 7 COVID-19-effects on selected sport-specific sectors

Affected sector	Effect	Effect intensity and duration	Whether foreign countries regulations may have major impact
Accommodation and food services (negative)	National and international (sport) events cancelled	Strong effect, long-lasting	Yes
Health sector (positive)	Team sport or even leaving home is prohibited. Less sport means fewer sport-related injuries.	Strong effect, temporary; strong correlation with movement restrictions	No
Health sector (negative)	Less physical activity affects health and fitness status; weight gain	Moderate effect, medium duration, higher demands for health sector services in the long term	No
Overall retail trade (negative)	Shops closed, no need for sport goods	Strong effect, temporary; largely recovered	Yes (for exports)
Sport events (negative)	Public events prohibited	Strong effect, duration depends on event size (smaller events recover earlier)	Yes
Sport journalism and sport bets (negative)	Reduction in sports to report and bet on, because national and international (sport) events cancelled	Strong effect; duration depends on event type Bet-intensive countries (e.g. UK) more affected	Yes
Sport facilities incl. fitness studios (negative)	Facilities closed; gatherings prohibited	Strong and temporary effect, especially for indoor sport. Moderate long-term effect	No

Source: SpEA, 2020.

This illustrates the considerable effect of COVID-19 across the sport sector as a whole, with virtually all sectors examined likely to have experienced a strong effect as a result of the pandemic. Closure of retail outlets, prohibition of public events, sport facilities closing all will have had large-scale effects on each sub-sector and across the whole sport sector.

While some sub-sectors may be already recovering, for example the retail trade, this is not necessarily guaranteed in the future and will depend on the future development of the pandemic and, for each Member State, the possible impact of regulations imposed in other Member States. Other sub-sectors face longer-term effects, for example sport events or accommodation and food services.

The health sector is highlighted as an area where COVID-19 is likely to result in a mixture of negative and positive financial effects, with reduced physical activity meaning a likely short-term decline in immediate injuries but potentially long-lasting implications due to decreased population physical and mental health.

While this table provides an overview across key sectors, there is a range of available data illustrating the potential or actual effect of the pandemic on a more granular level. Short examples are included below to illustrate the range of different types of economic effect that have occurred or may do so.

Sport stadia

- Stadia closed for sport in all countries once lockdown operations were implemented, with several converting for a short period into expanded diagnostic test centres or 'hospitals' for minor cases of infection.[20]
- The first events with fans on-site, but in reduced numbers, took place in August/September.[21],[22]
- Initial evidence suggests that even if restrictions are completely removed there may be some supporters who are reluctant to return immediately.[23]

Major sport events[24],[25],[26] (soccer)

- Top level soccer shut down across Europe due to the pandemic.
- Initial research[27] estimated the cost of finishing the 2019/20 season with games behind closed doors could result in player value declining by 17.7%, with this reflecting both the overall financial situation of clubs and the potential impact of restriction on players physical conditions.

[20] *Worldwide, Stadiums Adapt to Fight COVID-19 During Pandemic.* Available at: https://www.corona24news.com/u/2020/05/03/worldwide-stadia-adapt-to-fight-covid-19-during-pandemic-espresso-tv-news.html

[21] *French Stadiums to Reopen to Fans.* Available at: https://www.bangkokpost.com/sports/1938204/french-stadiums-to-reopen-to-fans

[22] *Coronavirus: How Technology Could Keep Football Fans Safe at Stadiums.* Available at: https://www.bbc.com/news/business-53947197

[23] Reade, J. J. and C. Singleton (2020). *Demand for Public Events in the COVID-19 Pandemic: A Case Study of European Football*. SSRN Electronic Journal.

[24] *Coronavirus: What Sporting Events are Affected by the Pandemic?* Available at: https://www.aljazeera.com/news/2020/03/coronavirus-sporting-events-affected-outbreak-200310084205890.html

[25] *Das Zweite Halbjahr 2020: So Sieht der Sportskalender Aus*. Available at: https://www.ispo.com/maerkte/das-zweite-halbjahr-2020-so-sieht-der-sportkalender-aus

[26] *Coronavirus: What sporting events are affected by the pandemic?* Available at: https://www.aljazeera.com/sports/2020/9/20/coronavirus-what-sporting-events-are-affected-by-the-pandemic

[27] KPMG Sports Advisory Practice (2020). *Player value not immune to pandemic: An analysis of the impact of the COVID-19 crisis on football players' market values.* Available at: https://footballbenchmark.com/documents/files/public/KPMG%20FBM%20report%20-%20Covid%20impact%20on%20players%20values%20-%206%20May%202020%20final.pdf

Major sport events[28],[29],[30] (marathons)

- Most marathons for 2020 have been significantly amended or cancelled, with some replaced by 'virtual runs'[31] to avoid potentially spreading the virus while also reducing participation costs.
- As regular marathons can have diverse and substantial positive effects on employment and long-term impacts of promoting exports and attracting foreign direct investment,[32] a move to 'virtual runs' is unlikely to mitigate significant economic impact.
- Adopting a 'virtual run' approach may reduce environmental impact and have a long-term benefit in keeping potential participants involved and able to restart regular marathons post-pandemic.

Sport Clubs/Sport facilities

- Lockdown and partial lockdown regulations put team sport including trainings completely or largely at hold, as a result of curfews, restrictions on gatherings (including for sport clubs), or facilities closing.
- Evidence suggests that due to the nature of pandemic-related restrictions, outdoor facilities have and will experience a faster economic recovery than indoor ones.[33]

Fitness Studios/Gyms

- Fitness studios are predicted to face severe economic consequences related to the pandemic for the foreseeable future.[34]
- Reopening is unlikely to result in full return to a pre-pandemic economic situation. Revenues are likely to decrease while costs increase following implementation of measures to prevent the virus spreading.
- Changes in customer routines and behaviour as a result of the pandemic and intervening period with no access to facilities may increase financial difficulties given the potential need to reduce customer density.

[28] *Coronavirus: What Sporting Events are Affected by the Pandemic?* Available at: https://www.aljazeera.com/news/2020/03/coronavirus-sporting-events-affected-outbreak-200310084205890.html
[29] *Das Zweite Halbjahr 2020: So Sieht der Sportskalender Aus*. Available at: https://www.ispo.com/maerkte/das-zweite-halbjahr-2020-so-sieht-der-sportkalender-aus
[30] *How Coronavirus is impacting running events.* Available at: https://www.runnersworld.com/news/a31353444/coronavirus-marathons-running-events-postponed-canceled/
[31] *World's Marathons.* Available at: https://worldsmarathons.com/s?search=&tag=virtual-run
[32] Papanikos, G. T., (2015). *The Economic Effects of a Marathon as a Sport Tourism Event* Athens Journal of Sports - Volume 2, Issue 4– Pages 225-240. Available at: https://www.athensjournals.gr/sports/2015-2-4-3-Papanikos.pdf
[33] Dominski, F. H. and R. Brandt (2020). *Do the benefits of exercise in indoor and outdoor environments during the COVID-19 pandemic outweigh the risks of infection?* Sport Sciences for Health 16(3): 583-588.
[34] Europe active (2020). *After Corona: How the sector may be different and never be the same again - and why this may not be all bad news*. Available at: https://www.europeactive.eu/sites/europeactive.eu/files/covid19/After_Corona.pdf

Goods and services necessary to do sport

- Severe crisis-related effects on the sport goods industry were foreseen in March 2020[35] and became evident in April, as noted in a survey among FESI members (see case study 7, and FESI Survey on COVID-19, Apr 2020[36]).
- A global survey conducted by the World Federation of the Sporting Goods Industry (WFSGI) in April showed Europe was particularly affected in comparison to other regions.[37]
- The length and intensity of financial difficulties was likely to depend largely upon the nature of individual goods, with running, outdoor and cycling being best placed to avoid difficulties and move into recovery.
- Data suggest bicycling has increased[38] during the pandemic. Survey results show European bicycle retailers reporting a faster recovery than in other sport sectors, with a 21% decline in revenue in March 2020 (compared to March 2019) followed by a smaller, 12% decline in May (compared with May 2019).

Goods and services conditional on doing sport: hotels and restaurants

- The tourism and leisure services and transport services were the sectors with the sharpest decline in activity in April 2020, although every sector recorded the "fastest contraction in output" since records began in January 1998.[39]
- The effect is particularly severe for those countries with a high share of tourism on GDP, such as Greece, Portugal and Austria.[40]

Health sector[41]/Sport injuries

- As noted, the health sector can be affected by COVID-19 in two ways:
    - Restrictions on sport activities resulting fewer injuries and therefore reduced expenditures relating to surgery, hospital stays, rehabilitation etc.
    - Reduced physical activity having negative implications for overall health, resulting in higher future demand for related services.

[35] *FESI Calls on the EU and Member States to Support the European Sporting Goods Industry.* Available at: https://fesi-sport.org/fesi-calls-on-the-eu-and-member-states-to-support-the-european-sporting-goods-industry/
[36] *The Sporting Goods Industry Severely Affected by the COVID-19 Crisis.* Available at: https://fesi-sport.org/the-sporting-goods-industry-severely-affected-by-the-covid-19-crisis/?utm_source=rss&utm_medium=rss&utm_campaign=the-sporting-goods-industry-severely-affected-by-the-covid-19-crisis
[37] *Sporting Goods Industry: Corona Crisis Mainly Affects Europe and Asia.* Available at: https://www.ispo.com/en/companies/wfsgi-survey-corona-crisis-mainly-affects-europe-and-asia
[38] *How COVID-19 Will Shape Urban Mobility.* Available at: https://www.bcg.com/de-at/publications/2020/how-covid-19-will-shape-urban-mobility.aspx
[39] *IHS Markit Europe Sector PMI.* Available at: www.markiteconomics.com/Public/Home/PressRelease/678c7ff554a04b7fb4429966a37361b9
[40] *Impact of the COVID-19 Lockdown on Trade in Travel Services.* Available at: https://www.ecb.europa.eu/pub/economic-bulletin/focus/2020/html/ecb.ebbox202004_01~d1a38decec.en.html
[41] SpEA, SIRC, Statistical Service of Cyprus, Meerwarde Sport en Economie, FESI, Ministry of Sport and Tourism of Poland (2012). *Study on the Contribution of Sport to Economic Growth and Employment in the EU*, study on behalf of the European Commission, DG EAC. Available at: https://op.europa.eu/en/publication-detail/-/publication/5da6b1f7-bc27-4bd5-9ed0-cba97a08b433

- Data for the Styria region in Austria[42] show sport-related injuries requiring medical care dropped to 50% in the intensive lockdown phase compared to pre-lockdown, with a subsequent increase to 80% of pre-lockdown levels in subsequent months.
    - Styria data also suggest declining physical activity led to an average weight increase of 2kg.

Sport betting

- The economic impact of COVID-19 on sport betting will differ depending on the type of sport and whether events are regional, national or cross-country.
- Data from France[43] show that betting revenues dropped by 87% in 2020 during the height of lockdown from mid-March to mid-May compared to in January and February of the same year.

2.3 Data on the economic impact of COVID-19 in the sport industry

This section provides data on the economic impact of COVID-19 on the sport industry. Analysis is based on secondary data, which was further complemented with a survey on the economic impacts of COVID-19 on the sport industry. The survey was designed to supplement the secondary data, as opposed to providing representative results.

Secondary Data

Secondary data from existing studies were used to calculate the effect of COVID-19 on the sport industry for each sector and Member State, with separate values being calculated for each. Sectors follow the Vilnius definition, including those classified as core, narrow and broad.[44]

The analysis approach adopted was deliberately designed to show the sport related effect as opposed to the total effect from any source. As an example, the impact of COVID-19 on the 'textiles, wearing apparel and related goods' category focused solely on sport related activities, like the production of sport wearing apparel, and not the whole textile sector.

The impact of COVID-19 on the sport industry is calculated for lower, medium and higher scenarios, with these titles reflecting the relative, not absolute, nature of measures taken in each. Titles therefore should not be interpreted as an assessment of overall effect.

- Lower scenario: a small decrease in the measures taken compared to summer 2020, with very few in the last quarter of the year, therefore a situation that is generally improving across sectors. This corresponds to a reasonable best-case scenario.
- Medium scenario: a small increase in the measures taken across the second half of the year compared to summer 2020.

[42] Spitzer, P., et al. (2020). *Trauma und COVID: Das Unfallgeschehen während des Lockdown Fokusreport*. Available at: https://grosse-schuetzen-kleine.at/wp-content/uploads/2020/07/Forschungszentrum-Unfallgeschehen-und-COVID-Fokusreport-2020.pdf?x19325

[43] *COVID-19 Hits French Sports Betting in Second Quarter.* Available at: https://www.igamingbusiness.com/news/covid-19-hits-french-sports-betting-second-quarter

[44] Sectors that belong to the core definition also belong to the narrow and to the broad definition. Those belonging to the narrow definition, are automatically part of the broad definition.

- Higher scenario: a sharp increase in the measures taken in the second half of the year compared to summer 2020, especially in the last quarter. This corresponds to a reasonable worst-case scenario.

These three scenarios therefore each provide an estimate of the effect of COVID-19 depending on the extent that mitigating measures are implemented. The recent reductions in stringency of measures outlined earlier suggest that the higher scenario may be most likely, but this should not be assumed as the nature and extent of the pandemic is difficult to predict. Moreover, it is possible that there will be increasing divergence in measures taken across Member States depending on both the spread of COVID-19 and the different approaches to implementation.

Table 8 shows the economic impact of COVID-19 on the sport industry in terms of the reduction in output per sector (NACE 2-digit business field). Values are given for each scenario as a percentage reduction compared to the reference scenario of no COVID-19 provided previously. Business fields are shown ranked by their 2-digit code.

The selected sectors correspond to those in the Vilnius definition, those coloured in red belong to the core, sectors coloured in blue mainly to the narrow and the rest mainly to the broad definition[45]. The economic impact in Table 8 is shown in terms of output per sector to allow for comparison with the results of the economic survey which included similar measures. This data should not be directly compared with GVA, GDP or employment effects provided in other sections of this report or elsewhere.

Table 8 Output reduction per sector, EU-28. 2020 COVID compared to reference scenario

NACE business field 2-digit		Lower	Medium	Higher
A01	Products of agriculture, hunting and related services	0.2%	0.2%	0.3%
C10-12	Food, beverages and tobacco products	1.4%	1.5%	1.8%
C13-15	Textiles, wearing apparel, leather and related products	0.0%	0.0%	0.0%
C18	Printing and recording services	0.0%	0.0%	0.0%
C19	Coke and refined petroleum products	8.0%	8.6%	10.1%
C21	Basic pharmaceutical products, pharmaceutical preparations	0.0%	0.0%	0.0%
C22	Rubber and plastic products	0.0%	0.0%	0.0%
C25	Fabricated metal products, except machinery and equipment	0.0%	0.0%	0.0%
C26	Computer, electronic and optical products	0.0%	0.0%	0.0%
C29	Motor vehicles, trailers and semi-trailers	4.3%	4.7%	5.5%
C30	Other transport equipment	9.9%	10.7%	12.3%

[45] A clear-cut division of every sector is not always possible. This is as different activities within the 2-digit field may belong to different parts of the Vilnius definition (core, narrow, broad).

C31_32	Furniture and other manufactured goods	9.9%	10.7%	12.3%
C33	Repair and installation of machinery and equipment	0.6%	0.7%	0.8%
F	Constructions and construction works	15.2%	16.4%	19.1%
G45	Wholesale and retail trade and repair services of motor vehicles and motorcycles	21.8%	23.5%	27.3%
G46	Wholesale trade services, except of motor vehicles and motorcycles	0.6%	0.6%	0.7%
G47	Retail trade services, except of motor vehicles and motorcycles	10.5%	12.5%	15.1%
H49	Land transport and transport via pipelines	32.1%	35.3%	39.8%
H50	Water transport services	42.8%	46.7%	52.4%
H51	Air transport services	44.2%	45.5%	48.5%
H52	Warehousing and support services for transportation	0.3%	0.3%	0.4%
I	Accommodation and food services	43.6%	47.6%	53.4%
J58	Publishing services	3.0%	3.2%	3.7%
J59_60	Motion picture, video and television programme production, sound recording, music publishing; programming and broadcasting	17.1%	18.4%	21.5%
J62_63	Computer programming, consultancy and related services; Information services	0.0%	0.0%	0.0%
K64	Financial services, except insurance and pension funding	0.0%	0.0%	0.0%
K65	Insurance, reinsurance and pension funding services, except compulsory social security	0.2%	0.3%	0.3%
M69_70	Legal and accounting services; services of head offices; management consultancy services	0.0%	0.0%	0.0%
M72	Scientific research and development services	2.2%	2.4%	2.8%
M74_75	Other professional, scientific, technical and veterinary services	1.7%	1.9%	2.2%
N77	Rental and leasing services	3.7%	4.0%	4.6%
N78	Employment services	2.6%	2.8%	3.2%
N79	Travel agency, tour operator, other reservation and related services	23.2%	24.8%	28.6%
N80-82	Security and investigation services; services to buildings and landscape; office administrative, office support	0.8%	0.9%	1.0%
O	Public administration and defence services; compulsory social security services	5.1%	5.5%	6.4%
P	Education services	2.6%	2.8%	3.2%

Q86	Human health services	9.4%	11.8%	16.4%
Q87_88	Residential care services; social work services	0.0%	0.0%	0.0%
R90-92	Creative, arts, entertainment, library, archive, museum, other cultural services; gambling and betting services	27.8%	27.8%	27.8%
R93_1	Sporting services	21.5%	23.1%	26.7%
R93	Sporting services and amusement and recreation services	16.3%	17.6%	20.4%
S95	Repair services of computers and personal and household goods	5.0%	5.3%	6.1%

Source: SpEA, 2020

Reductions in the sport-related output in each sector range from 0.0% to 53.4% depending on the nature of the sector and the scenario, indicating considerable variation in the effect of COVID-19 on different sport-related sections of the economy. Sporting services, which constitutes a considerable proportion of overall sport economic activity, shows an output reduction of around a fifth to a quarter in 2020 depending on the scenario (21.5% for lower, 23.1% for medium, 26.7% for higher).

The sport sectors with the highest reductions are:

- Accommodation and food services (lower: 43.6%, medium: 47.6%, higher: 53.4%).
- Water transport (42.8%, 46.7%, 52.4%).
- Air transport (44.2%, 45.5%, 48.5%).

The reductions in these sectors are mainly due to travel restrictions and cancelled events, which affect athletes and spectators alike.

Economic survey

The survey on the economic impact of COVID-19 in the sport industry in the EU was conducted to provide additional detail to complement secondary data. It included up to 20 questions divided into three sub-sections: general information on the organisation, COVID-19 impact and further comments. This survey was not designed to be representative of the sport sector across Europe and results should therefore be considered indicative for various reasons, primarily:

- The relatively low overall sample size for most questions (around 80-90 respondents) and, in particular, for sub-sectors or individual Member States.
- Data were collected using a cascade approach rather than a more comprehensive approach to sampling (due to the broad nature of the sector and the lack of suitable EU-wide sampling information).
- Secondary data is based on actual financial information whereas economic survey information reflects the perspective of individual stakeholders.

Participants were asked to provide their NACE 2-digit information, allowing categorisation of their main business field (see the following table).

In total, individuals at 117 organisations answered this question. Responses are shown below, ranked by two-digit code as in the previous table.

Table 9 Economic survey - NACE 2-digit business field

NACE Business field 2-digit		Number	Percentage
A02	Forestry and logging	1	1%
C10	food products	2	2%
C13	Textiles	5	4%
C14	Wearing apparel	5	4%
C16	Wood and cork	1	1%
C30	Other transport equipment	2	2%
C32	Furniture and other manufactured goods	2	2%
G45	Wholesale and retail trade and repair services of motor vehicles and motorcycles	1	1%
G46	Wholesale trade services, except of motor vehicles and motorcycles	3	3%
G47	Retail trade services, except of motor vehicles and motorcycles	5	4%
M72	Scientific research and development services	1	1%
N79	Travel agency, tour operator and other reservation services and related services	4	3%
P85	Education service	4	3%
R93	Sporting services and amusement and recreation services	71	61%
S94	Activities of membership organisations	7	6%
U99	Activities of extraterritorial organisations and bodies	3	4%
	Total	117	100%

Source: Economic Survey (Q2): Please give your NACE code (main business field): n=117

Overall, respondents from 15 different business fields answered. The majority (61%) were part of a primarily 'sporting service and amusement and recreation service'. The remaining proportion were allocated to a separate broad business field.

Effects on sales

Respondents were asked to estimate the likely impacts they expect COVID-19 will have on their sales in 2020 compared to 2019, with response from 86 individuals. This showed around three-quarters (78%) expected a decrease in sales. A small minority (5%) expected an increase, with the mean average expected at 28%. The remaining 17% expected sales to stay the same. The overall expected change in sales across all respondents was a decrease of 26%. This included those who expected no change, those who expected a decrease (average expected decrease of 35%) and those expecting an increase (28%).

Effects on personnel costs

All respondents were asked to outline the likely impacts of COVID-19 on personnel costs in 2020 compared to 2019, with 84 responding. Just over half (54%) expected no change, with 32% expecting a decrease (on average 17%) and 14% an increase (on average 21%). The overall expected change in personnel costs, including those that expect no change, was a decrease of 2%. Initial indications were that sport companies were more likely to expect a decrease in personnel costs than sport organisations or other types of body. This may be due to sport companies being more easily able to reduce personnel numbers (for example, releasing staff) or as they are less likely to access established governmental support schemes.

Effects on profits

In addition to the effects on sales and on personnel costs, participants were also asked to state the likely effect of COVID-19 on profits for 2020 compared to 2019. In total, 86 respondents answered, with 14% expecting no effect. Just over three-quarters (79%) expected a decrease, and 7% an increase. The overall mean change in profit across all respondents was 52% (70% for those expecting a decrease, 22% for those expecting an increase).

Comparison with secondary data

A comparison of responses suggests that the results from the economic survey are broadly in line with existing secondary data (see data limitations noted previously). The expected effects on sales (2020 compared to 2019) reported by respondents generally matches the secondary data in terms of direction of the impact, the magnitude of the impact and the relative impacts. While comprehensive sub-group analysis is not possible due to base sizes, results for the 'sporting service and amusement and recreation service' appear broadly comparable across the two analysis approaches.

Economic impact of COVID-19 on the sport industry in the EU in 2020.

The overall effect of COVID-19 on sport in the EU is calculated by comparing the reference scenario of no-COVID in 2020 (see Table 5) with the three COVID-19 scenarios covering the same period. All scenarios are based on the broad Vilnius definition of sport. This section contains the results for each of the three separate scenarios in turn.

Each of the three scenarios accounts for the likely changes in each Member State and for the EU-28 and EU-27 for each sector, based on the intensity of measures that are implemented. For example, the medium scenario is based on a reduction in the impact on sport-related tourism at an EU level of between ten percentage points (in August 2020) and 25 percentage points (in December 2020) compared to the lower scenario. These variations differ between the Member States to take account of the intensity of measures in each individual area.

As the scenarios for each area (Member State or EU-28/EU-27) include the whole of 2020 they include identical data for the pre-pandemic phase and only differ in terms of data from the pandemic phase onwards. This tends to minimise differences across scenarios for the whole year.

Each scenario includes a table outlining the difference from the reference scenario to the relevant COVID scenario. These tables include the following main categories in separate columns:

- Sport-related GDP. Data are shown for the difference in terms of million Euros and the share (percentage) of overall GDP that this represents.
- Sport-related employment. Data are shown for the difference in terms of million Euros and the share (percentage) of overall sport-related employment that this represents.

Information is shown for both direct and total (direct and indirect) effects, with the latter therefore including the effect on the supply network. A full worked example using actual data is provided in the following section.

Scenarios are shown in turn, starting with the higher scenario, potentially the most likely situation during the calculation phase of the study, followed by medium and lower versions.

Scenario 1: Higher

This section is based on a 'higher' scenario for Member States in 2020. This takes existing 2020 figures to July and provides a projection for the remainder of the year based on assuming that stricter regulations are required to deal with the pandemic, especially in the last quarter of the year. As with other scenarios, 'higher' refers to the extent that measures are implemented compared to the other scenarios ('medium' and 'lower' respectively) and does not indicate any assumption as to the suitability of approaches taken or possible overall effect.

Table 10 shows the impact of COVID-19 in terms of sport-related GDP (million Euros and overall share) and sport-related employment (persons and overall share) for each Member State and the whole EU. This table shows the difference between the original reference scenario of 2020 projected figures (as shown in Table 5) and the 'higher' scenario figures.

Using Latvia as an example, the first two main columns in the following table show a reduction of direct sport-related GDP of 24 million Euros and in total (direct and indirect) GDP of 204 million Euros. As shown in the next columns these figures equate to a decline in share (overall percentage) of 6.9% and 25.8% of direct and total GDP respectively. The lower decline in share for direct effects and higher share for total effects in Latvia than many larger countries could be due to smaller countries having greater dependence on foreign trade. This tends to benefit smaller countries during positive financial situations, but less so when economic conditions are more negative. The remaining columns show similar figures based on sport-related employment instead of GDP.

Table 10 Impact of COVID-19. Higher scenario

	Sport-related GPD				**Sport-related employment**			
	Million Euros		Share in sport-related GDP		Employees in persons		Share in sport-related employment	
	Direct	Total	Direct	Total	Direct	Total	Direct	Total
AT	3,522	5,014	20.3%	18.5%	48,484	63,080	20.4%	19.4%
BE	454	1,750	5.7%	11.8%	8,349	23,015	9.2%	16.7%
BG	41	135	6.5%	13.3%	3,613	8,267	7.8%	13.3%
CY	83	133	19.1%	19.2%	1,876	2,617	19.4%	18.7%
CZ	262	622	8.1%	7.6%	11,181	18,601	10.2%	9.4%
DE	22,644	34,154	17.4%	14.7%	370,247	486,784	18.8%	15.8%
DK	757	1,226	15.1%	14.8%	13,570	17,274	19.9%	18.0%
EE	11	166	3.1%	28.0%	594	3,945	4.0%	21.0%
EL	222	370	12.7%	14.4%	8,965	12,034	15.0%	15.5%
ES	3,491	5,280	19.3%	18.4%	60,498	84,134	19.5%	18.6%
FI	477	838	12.1%	12.3%	8,509	12,105	14.7%	13.7%
FR	5,611	8,571	11.6%	12.1%	73,561	102,150	11.3%	11.6%
HR	254	377	18.4%	16.5%	8,199	11,409	16.1%	15.5%
HU	205	449	10.5%	13.7%	11,441	18,429	12.6%	15.5%
IE	582	1,102	13.7%	17.2%	8,205	11,014	19.8%	19.4%
IT	4,096	7,915	16.1%	16.2%	68,391	110,818	16.0%	15.7%
LT	35	203	6.9%	25.8%	2,086	6,428	8.3%	19.7%
LU	89	273	7.7%	12.4%	443	1,037	9.2%	9.8%
LV	24	204	8.2%	44.0%	1,282	8,743	7.1%	37.3%
MT	23	108	8.0%	20.7%	566	1,829	9.9%	21.2%
NL	1,244	2,689	12.1%	15.5%	28,110	38,692	17.6%	17.2%
PL	1,648	3,270	13.0%	14.0%	55,572	99,220	15.1%	16.1%
PT	371	679	14.9%	14.2%	12,282	18,650	16.4%	16.1%
RO	205	642	8.0%	12.5%	10,028	24,032	8.8%	13.5%
SE	840	2,477	10.6%	18.0%	19,140	33,339	13.4%	16.9%
SI	65	137	8.2%	10.6%	2,175	3,582	8.9%	10.9%
SK	174	345	13.0%	14.2%	7,405	11,486	13.9%	15.7%
UK	9,500	20,038	18.0%	21.0%	254,753	355,740	20.6%	20.5%
EU-27	47,430	79,130	15.3%	14.8%	844,773	1,232,716	16.2%	15.6%
EU-28	56,930	99,168	15.7%	15.7%	1,099,526	1,588,456	17.0%	16.5%

Source: SpEA, 2020

As shown, the higher scenario estimates an impact across the EU-28 of direct GDP worth 56,930 million EUR or 15.7% of its direct sport-related GDP. As with the other COVID-19 scenarios, a similar picture is seen for sport-related employment as for GDP. Direct employment in this scenario is reduced by 1,099,526 persons (17.0% of the overall share) in comparison to the reference scenario. Total figures suggest sport-related GDP is smaller by 99,168 million EUR (15.7%), and employment by 1,588,456 (16.5%).

The higher scenario for the EU-27 estimates an impact of direct GDP worth 47,430 million EUR or 15.3% of its direct sport-related GDP. As with the other COVID-19 scenarios, a similar picture is seen for sport-related employment as for GDP. Direct employment in this scenario is reduced by 844,773 persons (16.2% of the overall share) in comparison to the reference scenario. Total figures suggest sport-related GDP is smaller by 79,130 million EUR (15.3%), and employment by 1,232,716 persons (15.6%).

As in the other scenarios, the greater decline in share for direct than total effects is due to the supply-network being affected slightly less in comparison to the direct elements of the economy although, as in other COVID-19 scenarios, different patterns are seen for individual Member States.

The largest reductions occur in Germany with a decline in direct sport-related GDP from initial 2020 no-COVID projections to the higher scenario of 22,644 million EUR. This accounts for almost 40% of the estimated 56,930 million EUR decline across the EU. The second largest reduction is in the United Kingdom, with a decline of 9,500 million EUR (nearly 17% of the total EU figures), followed by France (5,611 million EUR), Italy (4,096 million EUR), Austria (3,522 million EUR) and Spain (3,491 million EUR). Spain and Austria therefore switch ranks in the ‘higher’ scenario compared to the two other COVID-19 scenarios, although overall numbers are relatively similar for both Member States in each scenario.

While larger reductions in Euros and employees are seen in these six Member States than others, there are certain Member States where the share of GDP and employment suggests COVID-19 will have a particular impact in this scenario. These are similar to those identified in the other scenarios and very largely reflect the relative importance of the sector to the national economy. Those with the greatest decline in direct shares in this scenario are Austria (20.3% for GDP, 20.4% for employment), Spain (19.3%, 19.5% respectively), Cyprus (19.1%, 19.4%), the United Kingdom (18.0%, 20.6%), Denmark (15.1%, 14.8%) and Croatia (18.4%, 16.1%). Those with the least are Greece (2.7%, 3.5%), Belgium (4.5%, 7.3%) and Bulgaria (5.1%, 6.2%).

The decline in share across the EU in direct and total (both 15.7%) share of sport-related GDP in this scenario is higher than in the later lower scenario (12.5% and 12.6%) or medium scenario (13.7% and 13.7%). The difference between the scenarios (3.2 percentage points in direct and 3.1 in total for the lower scenario and 2.0 percentage points in direct and 2.0 in total for the medium scenario) across the EU can be compared to the difference seen in individual countries. This provides an indication of the relative impact of the severity of measures in each scenario across Member States.

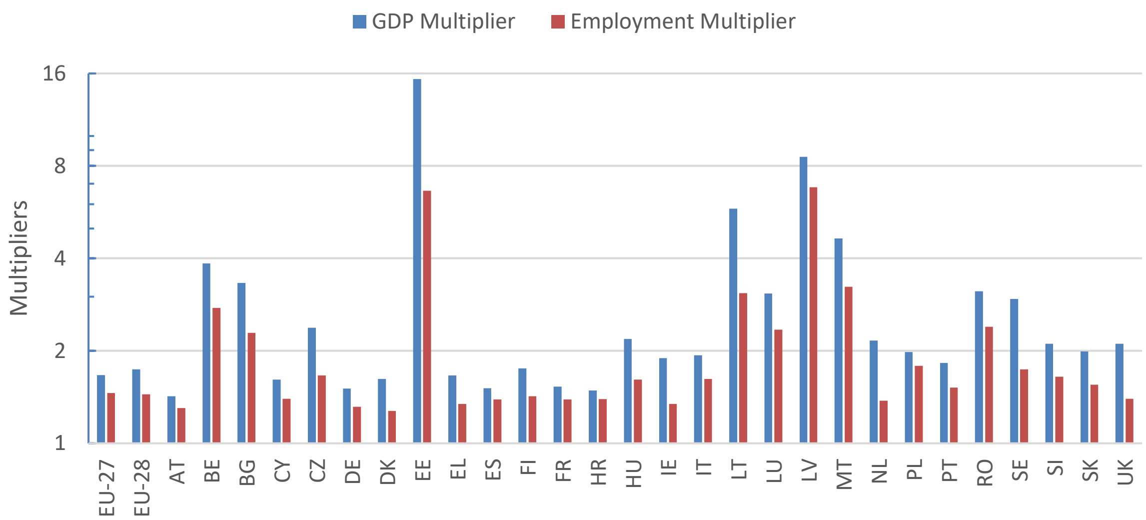
For example, if 2020 resulted in a higher rather than a medium scenario, this would result in an estimated change in direct GDP in Austria of 3.0 percentage points but 0.3 in Estonia:

- Greatest difference: Austria (3.0 percentage points in direct GDP), Croatia (2.8 percentage points), United Kingdom (2.4 percentage points), Germany (2.3 percentage points), and Cyprus (2.3 percentage points).
- Least difference: Estonia (0.3 percentage points), Lithuania (0.6 percentage points), and Malta (0.8 percentage points).

As we will also see in the following scenarios, Member States with the larger sport sectors tend to show higher differences, primarily as this analysis focuses on the absolute percentage point change. This highlights the overall importance of the sport sector in these particular economies as well as the effect of any change in scenario.

The following figure shows the national multipliers for each Member State and the EU in this scenario, with data for both the GDP (in blue) and employment (red) multipliers, with data shown using a logarithmic scale. As noted in annex five, these multipliers show the relationship between total and direct effects, with a higher multiplier suggesting that declines in direct effects are likely to have a larger impact on total effects than otherwise.

Figure 5 National multipliers. Higher scenario



Source: SpEA, 2020

Overall, the multipliers in this scenario are similar to those in the later scenarios. At an EU-28 level, the GDP multiplier is 1.74 and 1.44 for employment, and thus very similar to the other scenarios (medium of 1.74 and 1.45 respectively; lower of 1.75 and 1.45). This compares to EU-27 multipliers in the higher scenario of 1.67 for GDP and 1.47 for employment. This again suggests the strength of the impact on the rest of the economy does not depend strongly on the scenario.

As in other scenarios, there is considerable variation across countries, illustrating the different nature of the sport sector in each area and the relative weight of the direct and total elements. As in the other scenarios, the highest multipliers are in Estonia, Latvia and Lithuania, reflecting largely their links to the wider EU. Lowest multipliers are generally seen in Austria, Cyprus, Denmark, France, Germany, Greece and Spain.

Scenario 2: Medium

The medium scenario assumes a small increase of the measures taken in the Member States in the second half of the year. Table 11 shows the impact of COVID-19 in the sport sectors in each Member State as well as the EU-28 and EU-27 for this scenario.

Table 11 Impact of COVID-19. Medium scenario

	Sport-related GDP				Sport-related employment			
	Million Euros		Share in sport-related GDP		Employees in persons		Share in sport-related employment	
	Direct	Total	Direct	Total	Direct	Total	Direct	Total
AT	2,995	4,279	17.2%	15.8%	41,290	53,860	17.4%	16.6%
BE	391	1,517	4.9%	10.2%	7,189	19,949	7.9%	14.5%
BG	35	118	5.6%	11.6%	3,123	7,200	6.7%	11.6%
CY	73	117	16.8%	16.9%	1,660	2,311	17.2%	16.5%
CZ	224	538	7.0%	6.5%	9,615	16,071	8.8%	8.1%
DE	19,636	29,708	15.1%	12.8%	323,600	425,602	16.5%	13.8%
DK	644	1,049	12.8%	12.6%	11,560	14,765	16.9%	15.3%
EE	10	146	2.8%	24.6%	539	3,471	3.6%	18.5%
EL	195	324	11.1%	12.6%	7,773	10,472	13.0%	13.5%
ES	3,154	4,762	17.4%	16.6%	54,615	75,824	17.6%	16.7%
FI	409	720	10.4%	10.6%	7,293	10,402	12.6%	11.7%
FR	4,930	7,531	10.2%	10.6%	64,616	89,740	9.9%	10.2%
HR	215	322	15.6%	14.1%	6,964	9,745	13.7%	13.2%
HU	179	392	9.1%	11.9%	9,991	16,100	11.0%	13.6%
IE	502	957	11.8%	14.9%	7,087	9,550	17.1%	16.8%
IT	3,676	7,091	14.4%	14.5%	61,020	99,018	14.2%	14.0%
LT	32	180	6.3%	22.8%	1,909	5,734	7.6%	17.5%
LU	77	239	6.7%	10.8%	383	904	8.0%	8.5%
LV	21	179	7.4%	38.6%	1,136	7,669	6.3%	32.7%
MT	21	96	7.2%	18.4%	499	1,614	8.7%	18.7%
NL	1,083	2,349	10.5%	13.5%	24,510	33,779	15.3%	15.0%
PL	1,489	2,933	11.7%	12.6%	50,522	89,337	13.7%	14.5%
PT	316	581	12.7%	12.1%	10,417	15,908	13.9%	13.8%
RO	178	560	7.0%	10.9%	8,672	20,914	7.6%	11.8%
SE	714	2,135	9.0%	15.5%	16,290	28,624	11.4%	14.5%
SI	55	118	7.0%	9.1%	1,851	3,076	7.6%	9.3%
SK	151	300	11.3%	12.4%	6,404	9,959	12.%	13.6%
UK	8,231	17,369	15.6%	18.2%	221,469	308,942	17.9%	17.8%

EU-27	41,404	69,241	13.3%	12.9%	740,529	1,081,596	14.2%	13.7%
EU-28	49,635	86,609	13.7%	13.7%	961,997	1,390,538	14.9%	14.4%

Source: SpEA, 2020

In this scenario, the EU-28 is estimated to experience a reduction of direct GDP worth 49,635 million EUR or 13.7% of sport-related GDP. There is also a decline of 961,997 persons, equating to 14.9% of direct sport-related employment. Total figures (including indirect, supply network data) shows a reduction in GDP of 86,609 million EUR (13.7%) and 1,390,538 persons (14.4% of total sport-related employment) in this scenario compared to the reference scenario.

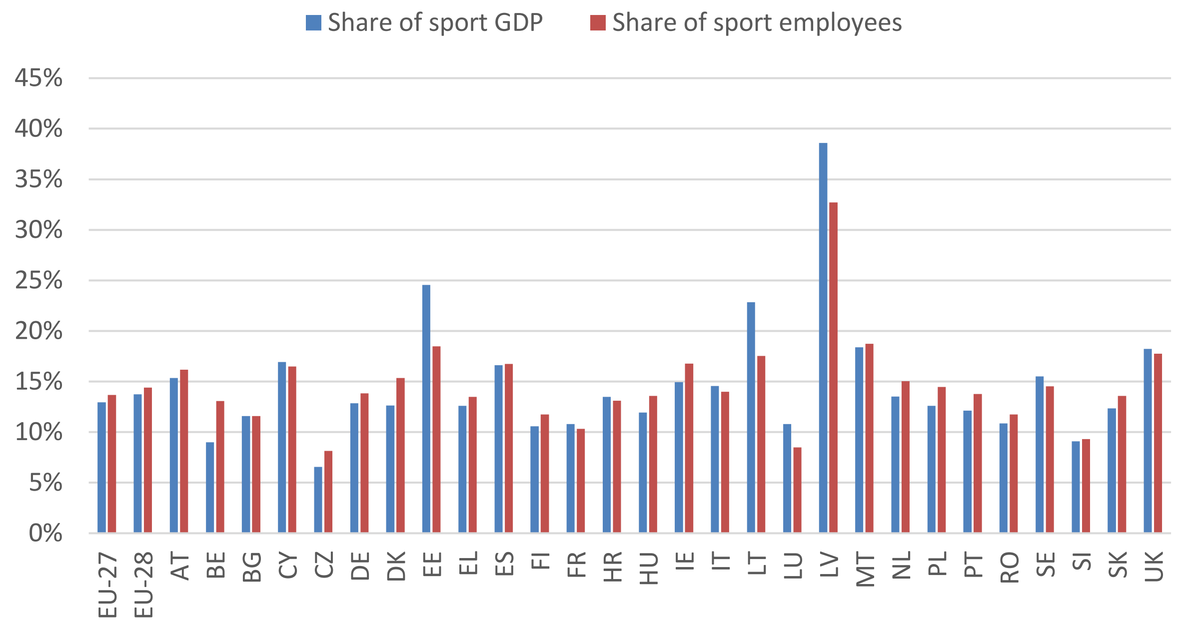
This medium scenario for the EU-27 estimates an impact of direct GDP worth 41,404 million EUR or 13.3% of its direct sport-related GDP. Direct employment in this scenario is reduced by 740,529 persons (14.2% of the overall share) in comparison to the reference scenario. Total figures suggest sport-related GDP is smaller by 69,241 million EUR (13.3%), and employment by 1,081,596 persons (13.7%).

The largest reduction in direct absolute GDP in a single Member State occurs in Germany with 19,636 million EUR (29,917 total). This value alone is more than one third (34.3%) of the EU-wide figure, due to Germany having both the highest sport-related GDP in the EU and being among the Member States which are most impacted in this scenario (15.1% reduction compared to the reference scenario). The decline in share relating to employment is higher still at 16.5%, equating to a decline in employment of 323,600 persons in the direct calculations.

The second highest impact is reported for the United Kingdom: 8,231 million EUR direct GDP (17,369 million EUR total, 20.1% of the EU figure) and 221,469 persons direct (308,942 total). France is ranked third, followed by Italy and Spain. Both these latter Member States have a comparatively strong tourism sector and were considerably affected by COVID-19. Although a small economy, Austria ranked sixth, due primarily to the greater importance of sport tourism in the country compared to many other Member States.

Figure 6 provides a summary of the total reductions in share for both GDP and employees in persons. As seen for the whole EU, the effect on employment is marginally greater than for GDP, but this is not a consistent pattern across Member States. The greatest effect is seen in Estonia, where GDP and employment are reduced by more than 30%, with Latvia second, followed by Lithuania and Malta. This follows the pattern elsewhere whereby greater reductions in share generally tend to be seen for smaller countries as their economies rely more than others on imports. The United Kingdom is an outlier to this rule. The smallest effects are in the Czechia, Luxembourg, and Slovenia.

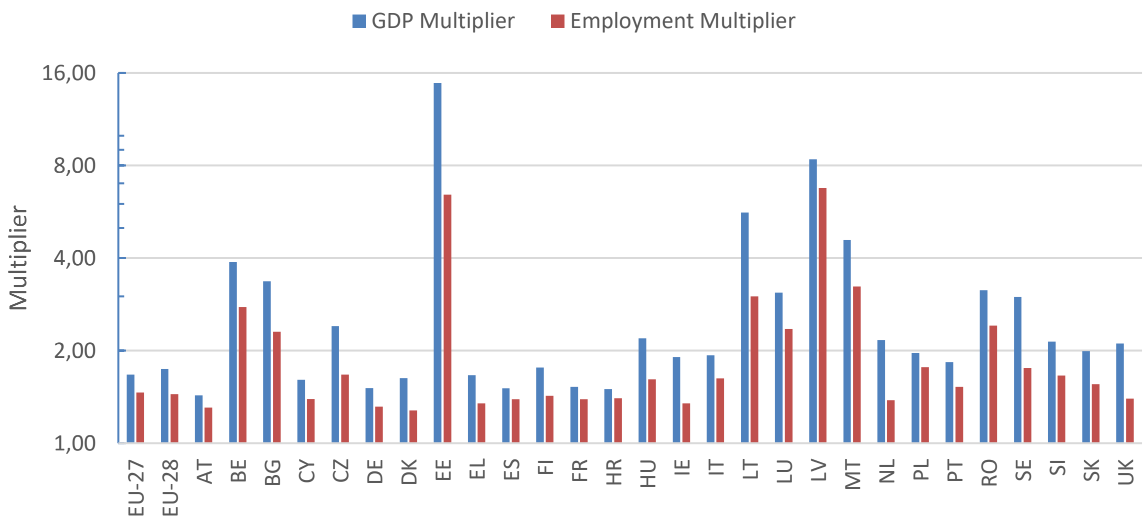
Figure 6 Reduction in share of total GDP and employment. Medium scenario



Source: SpEA, 2020

Figure 7 shows the national multipliers for each Member State and the EU in this scenario, with data for both the GDP (in blue) and employment (red) multipliers, shown using a logarithmic scale. As explained in annex five, these multipliers show the relationship between total and direct effects, with a higher multiplier suggesting that any change in direct effects are likely to have a larger impact on total effects than otherwise.

Figure 7 National multipliers. Medium scenario



Source: SpEA, 2020

Results show that multiplier value tends to be lower for employment than for GDP, both in the EU-28 (1.45 and 1.74), and for most Member States. This compares to EU-27 multipliers in the medium scenario of 1.67 for GDP and 1.46 for employment.

This is generally due to the higher direct employment in sport sectors than in the supply network, with this leading to a relatively higher multiplier for GDP (as if direct effects are high, the multiplier tends to be low). Identical multipliers are also seen in the later lower and higher scenarios.

The highest multipliers are seen for Estonia, Latvia, Lithuania, and Malta, suggesting that any decline in direct effects is likely to have a particularly considerable impact on indirect effects given the relative size of supply networks (which make up indirect effects). The smallest values can be found in Austria, Germany, Denmark, Greece, Spain, Finland, France, and Croatia.

Scenario 3: Lower

This section provides a lower scenario for Member States in 2020. This takes existing 2020 figures to July and provides a projection for the remainder of the year based on assuming a minimal increase in the measures taken across the second half of the year

Table 12Table 12 shows the impact of COVID-19 in terms of sport-related GDP (million EUR and overall share) and sport-related employment (persons and overall share) for each Member State as well as the EU-28 and EU-27 in this scenario. The table shows the difference between the reference scenario, namely the original 2020 projected figures (as shown in the following table), and the lower scenario assumptions.

Table 12 Impact of COVID-19. Lower scenario

	Sport-related GPD				Sport-related employment			
	Million Euros		Share of sport-related GDP		Employees in persons		Share of sport-related employment	
	Direct	Total	Direct	Total	Direct	Total	Direct	Total
AT	2,662	3,820	15.3%	14.1%	36,737	48,075	15.5%	14.8%
BE	357	1,395	4.5%	9.4%	6,565	18,323	7.3%	13.3%
BG	32	109	5.1%	10.7%	2,863	6,625	6.2%	10.6%
CY	68	109	15.7%	15.7%	1,552	2,154	16.1%	15.4%
CZ	205	495	6.4%	6.0%	8,819	14,779	8.1%	7.5%
DE	17,973	27,194	13.8%	11.7%	295,881	389,352	15.1%	12.6%
DK	586	959	11.7%	11.5%	10,554	13,500	15.4%	14.0%
EE	9	134	2.7%	22.7%	514	3,217	3.5%	17.1%
EL	179	298	10.2%	11.6%	7,104	9,592	11.9%	12.4%
ES	2,966	4,469	16.4%	15.6%	51,309	71,138	16.5%	15.7%
FI	375	661	9.5%	9.7%	6,688	9,552	11.5%	10.8%
FR	4,600	7,018	9.5%	9.9%	60,209	83,554	9.3%	9.5%
HR	190	287	13.7%	12.6%	6,182	8,713	12.2%	11.8%
HU	165	361	8.4%	11.0%	9,194	14,816	10.1%	12.5%
IE	460	879	10.9%	13.7%	6,493	8,757	15.7%	15.4%
IT	3,434	6,626	13.5%	13.6%	56,852	92,427	13.3%	13.1%

LT	31	167	6.0%	21.2%	1,828	5,368	7.3%	16.4%
LU	71	219	6.1%	9.9%	350	829	7.3%	7.8%
LV	20	165	6.9%	35.7%	1,064	7,089	5.9%	30.2%
MT	20	90	6.7%	17.1%	462	1,495	8.1%	17.4%
NL	994	2,160	9.7%	12.4%	22,518	31,058	14.1%	13.8%
PL	1,415	2,774	11.2%	11.9%	48,157	84,624	13.1%	13.7%
PT	287	530	11.6%	11.1%	9,414	14,461	12.5%	12.5%
RO	164	516	6.4%	10.0%	7,925	19,217	6.9%	10.8%
SE	651	1,958	8.2%	14.2%	14,898	26,242	10.4%	13.3%
SI	49	107	6.2%	8.2%	1,656	2,780	6.8%	8.4%
SK	137	274	10.2%	11.3%	5,799	9,068	10.9%	12.4%
UK	7,496	15,866	14.2%	16.7%	202,324	282,467	16.3%	16.2%
EU-27	38,100	63,774	12.3%	11.9%	681,588	996,807	13.1%	12.6%
EU-28	45,596	79,641	12.5%	12.6%	883,912	1,279,274	13.7%	13.3%

Source: SpEA, 2020

As shown, a lower scenario estimates an impact across the EU-28 of direct GDP worth 45,596 million EUR or 12.5% of its sport-related GDP. A higher level is seen in sport-related employment, with direct employment estimated to be smaller by 883,912 persons (13.7% of the overall share). Total figures suggest sport-related GDP is smaller by 79,641 million EUR (12.5%) and employment by 1,279,274 (13.3%).

The lower scenario for the EU-27 estimates an impact in direct sport-related GDP worth 38,100 million EUR or 12.3%. Direct employment in this scenario is reduced by 681,588 persons (13.1% of the overall share) in comparison to the reference scenario. Total figures suggest sport-related GDP is smaller by 63,774 million EUR (11.9%), and employment by 996,807 persons (12.6%).

As in the other scenarios, the greater decline in share for direct than total is due to the supply network being slightly less affected. However, this pattern is not consistent across all Member States with, for example, Belgium having a higher share in total than direct effects.

As elsewhere, the largest reductions occur in Germany with a decline in direct sport-related GDP from initial 2020 reference scenario of no-COVID to the lower scenario of 17,973 million EUR. This accounts for more than one third (39%) of the estimated 45,596 million EUR decline across the EU. The second largest reduction is in the United Kingdom with a decline of 7,496 EUR (16% of total EU figures), third is France (4,600 million EUR), followed by Italy (3,434 million EUR), Spain (2,966) and Austria (2,662).

While larger reductions in GDP and employees in persons are seen in these Member States than others, there are other Member States where the share of GDP and employment suggests COVID-19 will have a particularly notable effect. These are similar to those identified elsewhere and largely reflect the relative importance of the sector to the national economy.

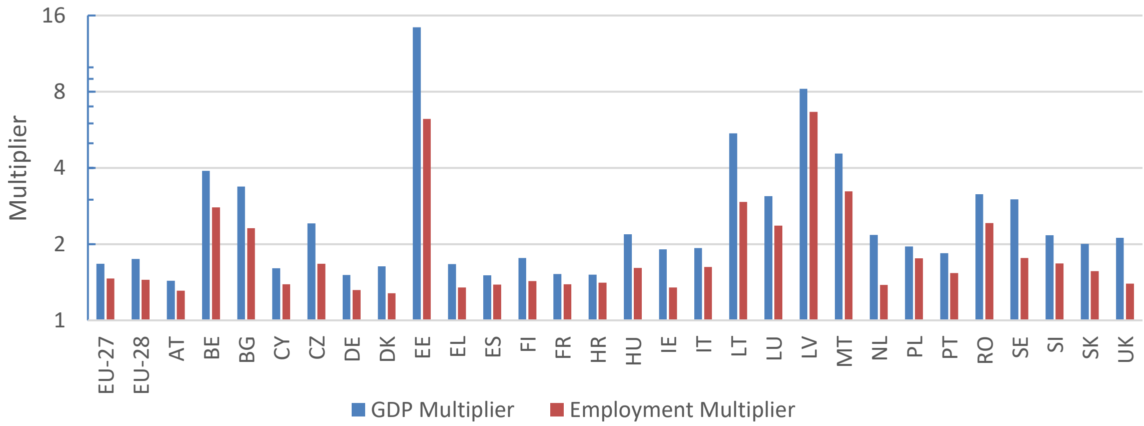
Those with the greatest decline in direct shares in this scenario are Spain (16.4% for GDP, 16.5 for employment), Cyprus (15.7%, 16.1% respectively), Austria (15.3%, 15.1%), the United Kingdom (14.2%, 16.3%), Germany (13.8%, 15.1%), Croatia (13.7%, 12.2%) and Italy (13.5%, 13.3%). Those with the least are Estonia (2.7%, 3.5%), Belgium (4.5%, 7.3%) and Bulgaria (5.1%, 6.2%).

The decline across the EU-28 in direct (12.5%) and total (12.6%) share of sport-related GDP in this scenario is less than for the medium scenario (13.7% and 13.7% respectively). This difference in the EU in direct shares of 1.2 percentage points can be compared to that in individual countries. This provides an indication of the relative impact of the measures in each scenario across Member States, for example, if 2020 resulted in a 'lower' rather than a 'medium' scenario, this would result in an estimated difference in direct GDP in Austria of 1.9 percentage points but 0.1 in Estonia. As this examines the absolute difference in percentage points, this analysis takes into account the overall size of the sport sector. It is thereby being more likely to show greater differences in Member States with larger sport sectors and smaller differences where sport sectors are smaller (although this is not strictly the case, as shown in Figure 9 where the relative ranks of Member States change):

- Greatest difference: Austria (1.9 percentage points in direct GDP), Croatia (1.8 percentage points), the United Kingdom (1.4 percentage points), Germany (1.3 percentage points), and Cyprus (1.1 percentage points).
- Least difference: Estonia (0.1 percentage points), Lithuania (0.3 percentage points), and Latvia (0.4 percentage points).

Figure 8 shows the national multipliers for each Member State and the EU in the lower scenario, with data for both the GDP (in blue) and employment (red) multipliers, both being shown using a logarithmic scale. As noted in annex five, these multipliers show the relationship between total and direct effects, with a higher multiplier suggesting that declines in direct effects are likely to have a larger impact on total effects than otherwise.

Figure 8 National multipliers. Lower scenario



Source: SpEA, 2020

The EU-28 level multipliers in this scenario are very similar to those in the other scenarios (1.75 for GDP, 1.45 for employment). This compares to EU-27 multipliers in the lower scenario of 1.67 for GDP and 1.46 for employment.

As in the other scenarios, there is considerable variation in multipliers across countries, illustrating the different nature of the sport sector in each area and the relative weight of the direct and total elements. The highest multipliers can generally be seen in this scenario for the Baltic countries, reflecting that these economies are most closely linked to the EU's most affected sport-related sectors and hence are particularly influenced by the COVID-19 effect on other Member States.

2.4 Economic analysis conclusion

A summary of EU-wide results is shown in Table 13, showing results for the three main categories in the Vilnius definition of sport. The core definition contains mainly sport clubs and sport facilities. The narrow definition extends the core definition by all goods and services necessary to do sport (e.g. sport gear or education). The broad definition includes the narrow and thus the core definition and adds all goods and services which need sport as an input (e.g. tourism or sport betting). See annex four for full definition.

Table 13 Impact of COVID-19, sport-related GDP and employment. EU-28

		Lower		**Medium**		**Higher**	
		Direct	Total	Direct	Total	Direct	Total
GPD in m Euros	Core	6,632	12,536	7,144	13,510	8,290	15,694
	Narrow	23,985	40,976	25,790	44,016	29,748	50,711
	Broad	45,596	79,641	49,635	86,609	56,930	99,168
GDP share	Core	1.8%	2.0%	2.0%	2.1%	2.3%	2.5%
	Narrow	6.6%	6.5%	7.1%	7.0%	8.2%	8.0%
	Broad	12.5%	12.6%	13.7%	13.7%	15.7%	15.7%
Employees in persons	Core	135,239	232,809	145,662	250,895	169,023	291,431
	Narrow	437,201	647,887	468,637	694,333	537,797	796,771
	Broad	883,912	1,279,274	961,997	1,390,538	1,099,526	1,588,456
Employment share	Core	2.1%	2.4%	2.3%	2.6%	2.6%	3.0%
	Narrow	6.8%	6.7%	7.3%	7.2%	8.3%	8.3%
	Broad	13.7%	13.3%	14.9%	14.4%	17.0%	16.5%

Source: SpEA, 2020

Depending on the scenario, the direct impact on sport in the EU-28 is estimated to be between 45,596 million EUR GDP and 56,930 million EUR GDP and between 883,912 and 1,099,526 employees in persons. If the supply networks are included to provide a total figure, numbers increase to between 79,641 million EUR GDP and 99,168 million EUR GDP and between 1,279,274 and 1,588,456 persons. These values relate to approximately 13% to 17% of the overall respective shares.

Table 14 Impact of COVID-19, sport-related GDP and employment. EU-27

		Lower		Medium		Higher	
		Direct	Total	Direct	Total	Direct	Total
GPD in m Euros	Core	5,996	10,667	6,454	11,482	7,480	13,308
	Narrow	20,940	33,512	22,395	35,953	25,903	41,323
	Broad	38,100	63,774	41,404	69,241	47,430	79,130
GDP share	Core	1.9%	2.0%	2.1%	2.1%	2.4%	2.5%
	Narrow	6.7%	6.3%	7.2%	6.7%	8.3%	7.7%
	Broad	12.3%	11.9%	13.3%	12.9%	15.3%	14.8%
Employees in persons	Core	102,705	166,904	110,369	179,359	127,547	207,274
	Narrow	337,867	504,528	361,935	540,078	414,759	618,323
	Broad	681,588	996,807	740,529	1,081,596	844,773	1,232,716
Employment share	Core	2.0%	2.1%	2.1%	2.3%	2.4%	2.6%
	Narrow	6.5%	6.4%	6.9%	6.8%	7.9%	7.8%
	Broad	13.1%	12.6%	14.2%	13.7%	16.2%	15.6%

Source: SpEA, 2020

Depending on the scenario, the direct impact on sport in the EU-27 is estimated to be between 38,100 million EUR GDP and 47,430 million EUR GDP and between 681,588 and 844,773 employees in persons. If the supply networks are included to provide a total figure, numbers increase to between 63,774 million EUR GDP and 79,130 million EUR GDP and between 996,807 and 1,232,716 persons. These values relate to approximately 12% to 16% of the overall respective shares.

As would be expected, the broader the Vilnius definition, the greater the share of GDP and employment that it accounts for in the economy, with the share for core being lower than that for the narrow and, especially, broad definitions. Most of the difference between the narrow and the broad definition is due to the tourism sector being included in the latter. Other sectors of the broad definition that tend to be more greatly affected are tourism-related services like transportation or travel agencies as well as sport betting and those relating to population health.

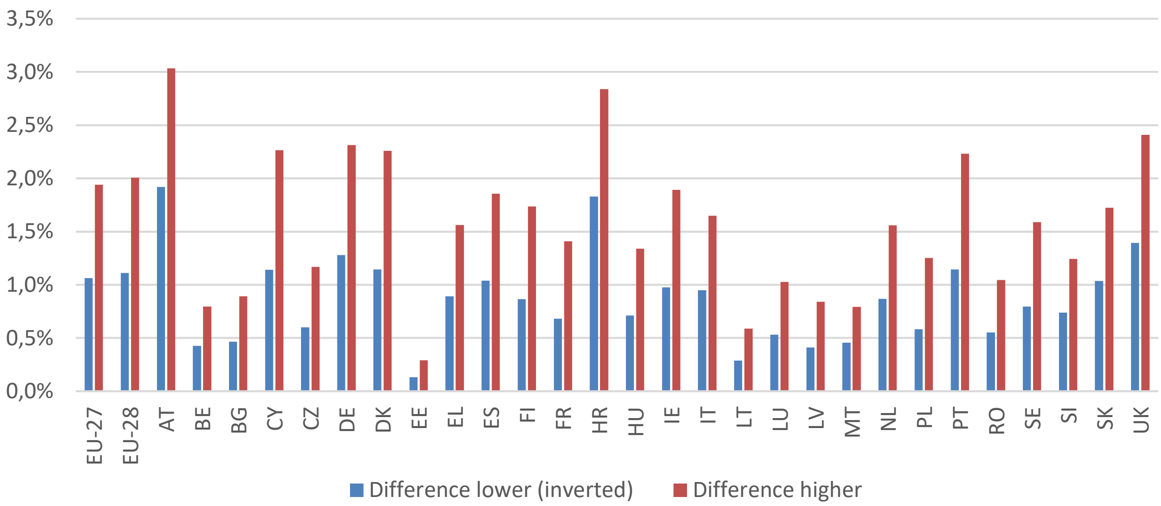
Information on the effect on individual sectors across scenarios is contained in annex seven. The sectors most likely to be affected are sporting services (GDP range from 12.5 bn EUR in lower scenario to 15.7 bn EUR in the higher) and accommodation services (13.1 bn EUR to 16.0 bn EUR respectively). Full details for all sectors are included in the table, but other sectors that are particularly affected include:

- Land transportation. Reduction of 4,052 million EUR in GDP and 65,344 employees in persons. The main reason is the lack of tourists, but also the results of a decline in active and passive sport participation.
- Retail trade. Reduction of 4,747 million EUR GDP and 111,246 employees in persons.

- Creative, arts, entertainment, library, archive, museum, other cultural services; gambling and betting services. Since betting shops were closed and there was a lack of sport events to bet on, there have been notable reductions (3,829 million EUR GDP and 75,588 employees in persons).
- Real estate services. As rents for sport-related real estates (companies, clubs, sport facilities) cannot be paid, losses in GDP worth 3,108 million EUR and 2,461 jobs are estimated.

Figure 9 shows the difference between scenarios across each Member State, summarising the information provided across previous scenarios. The left bar for each Member State shows the difference in the share of sport-related GDP for the medium scenario compared to the lower scenario in percentage points. As an example, Cyprus reports a loss of 16.9% of total GDP in the medium scenario, but only 15.7% in the lower scenario. The difference of 1.1 percentage points is shown as the left blue bar for Cyprus. The right red bar for each shows the difference in GDP for the higher scenario compared to the lower scenario. A greater level for each bar therefore corresponds to a more notable effect on GDP if increased measures are taken as a result of COVID-19. Signs have been inverted for ease of comparability[46].

Figure 9 Comparison of losses over scenarios



Source: SpEA, 2020

Again, there is an association between the shown values and the size of the sport-related industry in a Member State, with Member States with larger sport sectors showing the most difference. This shows considerable differences across Member States. Austria's and Croatia's GDP depend more on the scenario than that of any other Member State (more than 1.5 percentage points in the lower scenario and more than 2.5 percentage points in the 'higher' scenario). Cyprus, Germany, Denmark, and Portugal follow. The ranking of Member States changes slightly across scenarios (e.g. Spain shows a higher reduction of GDP in the medium and lower scenario compared to Austria, but it is the other way around in the higher scenario).

[46] It is standard to compare to the middle point (in this case the medium scenario). This results in the comparison from the higher scenario having a positive sign and that from the lower scenario having a negative sign. Inverting so both have a positive sign avoids difficulty interpreting these results.

3. Work package Two: Measures and Initiatives

This section outlines the policy and strategic background for the mapping study and includes overall findings from desk and primary research (surveys and interviews with key industry stakeholders). It examines the perceived economic impact of COVID-19 on the sport sector across EU Member States. It then assesses the different measures and initiatives put in place to support the sector during the pandemic period. Details are provided for each separate type of measure or initiative, outlining how they have been implemented, as well as the extent stakeholders perceive them to be effective. Annex eight provides a summary of the different measures and initiatives mentioned in this section, alongside some additional examples.

3.1 Perceived economic impact of COVID-19

As outlined throughout this report, the economic effect of COVID-19 on the sport sector is substantial. This section of the report provides an overview of this effect, focusing primarily on the perception among stakeholders taking part in this research as a counterpart to the purely economic data provided previously.

With the introduction of social distancing measures to limit the spread of COVID-19, the ways and extent to which sporting activities can take place at professional and grassroots levels has been severely impacted. The resulting effects have been keenly felt by athletes, sport clubs, broadcasters, retailers, freelancers, and sport federations. Stakeholders at both the professional and grassroots levels have identified several impacts of the COVID-19 pandemic.

Stakeholders believe that COVID-19 has severely disrupted professional sport, with many professional leagues and activities across Europe having to suspend or cancel their activities to help limit the spread of the virus. Stakeholders identified several key pressures that are currently impacting professional sport:

- Uncertainty over both national and international competition calendars, thereby limiting the degree to which the day to day business of running and planning fixtures and events can be executed in a smooth manner.
- The challenge of managing budgets that were designed in the context a sporting calendar that is no longer relevant.
- Lost or reduced commercial relationships following cancelled or postponed events and reduced investment more generally.
- Lost ticket and broadcast revenues.
- Potentially reduced levels of fan engagement.

Where it has been possible for sport activities to continue or resume after lockdown, stakeholders have indicated that they have been required to do so within a potentially limiting set of restrictions on aspects such as crowd attendance, international travel, and new health and safety precautions. At the same time, the sector has been characterised by reduced budgets and revenues, and uncertainty over the future outbreaks and the health of the economy. These combined factors have created a unique environment for professional sport organisations, which threatens economic viability.

The European sport sector also relies on many businesses, clubs, and associations at the amateur, recreational and grassroots levels. However, with so many stakeholders at this level also encountering the effects of revenue cuts and new COVID-19 related restrictions, the impact of the current economic and health crisis is considerable. As many grassroots organisations or clubs have limited financial reserves, stakeholders felt their ability to remain viable was not guaranteed, especially when they rely on membership fees and support from volunteers, both of which have reduced due to the pandemic. There is concern that the current crisis could directly threaten the long-term viability of organisations and clubs at the grassroots level.

With key revenue streams reduced or even stopped, and a negative multiplier effect impacting the industry more generally, stakeholders are concerned about the future of the sector. A particular theme was that the voice of the sport sector should be heard in discussions around pandemic measures. For example, reduced tourism and social distancing not only affects sporting events but also the sport retail industry and other similar sectors.

The various impacts that organisations and individuals identified are summarised below:

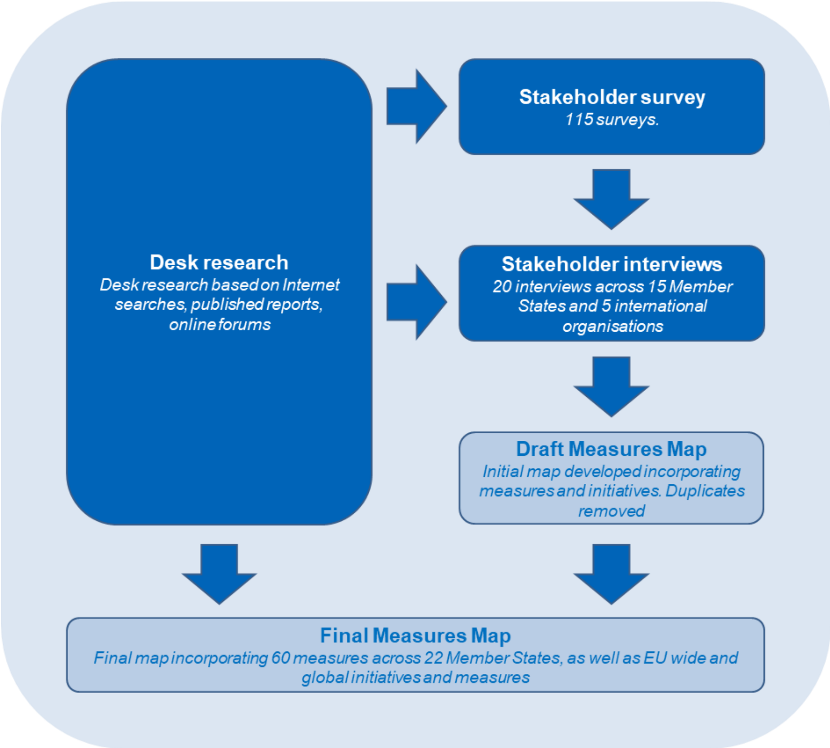
- **Lost revenue.** Organisations unable to provide their services to the public. This includes considerable reductions in income from across various sources, e.g. membership, licensing, participation, ticketing, broadcasts, sponsorship, or subscriptions.
- **Cash flow difficulties.** Organisations have struggled to pay fixed costs, including wages, rents, and contractual obligations. Due to lost revenue to cover obligations, this risks cuts to staff numbers and activity in order to remain solvent.
- **Unemployment and insecure work.** Employees, athletes, coaches, and other workers risk being laid-off, with subsequent loss of skills. Employees also generally feel less secure in their jobs.
- **Freelancers.** As they are self-employed, freelancers are particularly vulnerable to losses in income, largely due to having fewer legal protections.
- **Athlete income.** Athletes have been affected by loss of income due to lack of events, as well as the financial implications of reduced sponsorship, prize money and other public and private sources of funds.
- **Unpaid workforces.** Organisations have lost capacity, with volunteers often restricted to their homes or having limited mobility or ability to continue work due to the pandemic.

While each will affect different types of organisation within the sport sector and across Member States in different ways, the cumulative effect was seen as a period of extreme uncertainty and financial crisis, with future planning complicated.

3.2 Measures and initiatives: overview

Information on the measures and initiatives being implemented to deal with the economic impact of COVID-19 on the sport sector was collected through the project. This was then collected into the measures map providing comprehensive information on each measure or initiative (see Figure 10).

Figure 10 Development process of measures map



The map was designed to capture the variety of different measures introduced as opposed to being a fully representative picture across the entire sector. Information in this report on measures and initiatives should not be interpreted as providing quantifiable information on the overall number and coverage of different measures and initiatives.

In total, 60 individual measures and initiatives of varying size, complexity and ambition were included. This included measures from 22 individual EU Member States, as well as those implemented at an EU or global level. These have been categorised into *seven broad typologies*. A summary of each is included below, with full details provided subsequently:

1. **New structural grants and funding approaches.** Newly introduced grants that aim to provide financial support to organisations so they can continue activities and operations during the pandemic, compensate for revenue losses such as for cancelled or postponed events, and/or provide finance for new activities and opportunities.
2. **Exemption, postponement, or deferral of obligations.** All support measures that exempt or postpone obligations such as tax and debt payments, social security payments, deferral of ticket reimbursement in case of cancelled or postponed events, and legal obligations (such as licensing) particularly in the case of broadcasts and other media services.
3. **Extension and adjustment of pre-existing support measures.** The continuation, extension, referral, or redirection of pre-existing funds to support the sport sector during the pandemic, including relaxation of grant and loan requirements.
4. **Advancement of payments**. Any type of payment made before the due date, including grant instalments, compensation payments, or any other allowances.

5. **Furlough schemes.** Schemes to cover employee salaries where these have been reduced or stopped due to the pandemic.
6. **Allowances for freelancers and athletes.** Direct support dedicated to freelancers, self-employed and self-funded athletes that do not have the protections afforded to them by formal employment.
7. **Information resources and guidance**. Resources providing information or broader support relating to economic COVID-19 issues, as well as guidance around reopening after lockdown and adjusting business models to pandemic restrictions.

An 'other' typology is also included in the following section to incorporate those that do not fit under the main typologies listed previously. These typologies are discussed in greater detail in the following section, providing information on how and why initiatives in each typology have been introduced, their effectiveness and potential future development and sustainability.

3.4. New structural grants and funding approaches

New grants and funds have been introduced across many EU Member States by various national governments and sport bodies. They are one of the most common types of initiatives that have been introduced at the national and international levels and seek to provide an immediate source of finance to improve financial viability during the pandemic period.

Scope of measure or initiative

The main rational for establishing these initiatives has been to provide specific financial support to organisations in the sport sector to enable them to continue activities, pay bills and meet costs during the pandemic. Stakeholders prioritised adopting these measures as a result of their considerably reduced revenue streams while outgoing costs were still substantial, including wages, rents, and contractual obligations. Grants therefore provided immediate liquidity and financial support to address cash flow and financial difficulties.

Typically, these types of initiatives have been large in scale, financed by national level governments and sport bodies with enough available capital to support large parts of the national sport sectors. While this approach has been standardly implemented at scale across Member States, the exact mechanisms and approaches used have varied. The most common theme was the development of large-scale funding via governmental bodies, for example:

- A 70 million EUR initiative approved by the Irish government (see case study 1) to support the national sport sector, with money directed towards a combination of national sport federations and organisations, as well as sport clubs and grassroots organisations.[47]

[47] Irish Department of Transport, Tourism and Sport (2020). *Ministers announce COVID-19 funding support for the sport sector*. Available at: https://www.gov.ie/en/press-release/1da81-ministers-announce-covid-19-funding-support-for-the-sport-sector/

- A more focused fund was launched by the Swedish Government and Swedish Sports Confederation consisting of 1 billion SEK (96 million EUR) specifically granted to organisations that have lost revenue due to the restrictions on public gatherings.[48]

An alternative, less common theme was taking a more decentralised approach, with sport bodies encouraging alternative funding routes as an addition to more standard funds or grants. One example is the 'Soutiens ton club' initiative (see case study three) jointly launched by the French National Olympic Committee and French Ministry of Sport. This provides a platform to allow individuals and businesses to make donations to local sport clubs of their choice. A 10 per cent levy is taken on each donation to specifically support organisations in the most need.

Perceived effectiveness

These grants and funds have been welcomed by stakeholders as an immediate source of finance to improve short-term economic viability and facilitate longer-term recover. Stakeholders suggested that without finance being quickly and easily available they would have had to further reduce their service level or staff numbers, or potentially close, due to lost revenue and/or cash flow difficulties. A key success factor has been the ease of application processes and speed of implementation, with this helping reduce the administrative burden on organisations and ensure that money is available quickly. Another important theme was that these grants enabled lost revenue to be directly replaced to a greater extent than with other types of measure, such as reducing obligations, furlough schemes or the provision of support and guidance.

A particular consideration whether funds should be means tested and targeted at the most suitable organisations. This was seen as making sure that certain parts of the sport sector, primarily smaller, more local and grassroots sport organisations, were financially viable given their dependence on membership fees and lack of savings, sponsorship income and broadcast revenues. It was also suggested that means testing should account for long-term viability where possible, avoiding financing clearly unsustainable business models. An alternative theme, especially from governments and sporting federations, was the concern that mean testing may negatively affect the speed of delivery at a time when this was paramount. This suggests a trade-off between implementation speed and targeting, with the stress on each potentially changing as the pandemic situation develops.

A separate theme was that new structural grants and funds are not necessarily likely to provide a long-term solution by themselves, given the demands of public budgets and the long-term effect of the pandemic across sport organisations. While there was an urgent need to provide finance as quickly as possible once the effect of the pandemic was clear, further funding should be integrated into longer-term plans. Another theme was wider development of funds that required organisations to ringfence finance to spend on 'return to sport' initiatives. Finally, it was suggested that, as done in some countries, funds could encourage the development of digital business models to provide additional revenue while more traditional, face-to-face approaches cannot be implemented.

[48] Swedish Ministry for Culture and Sport (2020) *SEK 1 billion to culture and sport as a result of the impact of the COVID-19 virus.* Available at: https://www.government.se/press-releases/2020/03/sek-1-billion-to-culture-and-sport-as-a-result-of-the-impact-of-the-covid-19-virus/

3.5. Exemption, postponement, or deferral of obligations

This section covers measures and initiatives designed to allow for the exemption, postponement, or deferral of obligations to reduce the financial burden on organisations.

Scope of measure or initiative

These measures generally seek to improve financial viability directly by reducing immediate financial burden, primarily through dealing with ongoing running costs and/or additional payments caused by the pandemic. Several different approaches can be taken, including:

- Reducing or exempting sport organisations from tax, debt, rent and social security obligations.
- Amending rules around the fulfilment of contractual obligations, particularly concerning the payment by broadcasters, or repayment by sport organisations, of money for cancelled and postponed events.
- Changing rules around the deferral of ticket reimbursements for cancelled and postponed event.

Most initiatives concerning the exemption or postponement of tax, rent and social security obligations have been implemented by national governments, with these taking various forms to meet specific needs. For example, the Dutch Government developed an initiative to compensate sport clubs for three months of rent to help cover costs during lockdown period. A different initiative to reduce obligations was established by the French Government, suspending the requirement for Small and Medium Sized Enterprises (SMEs) in the sport and cultural events sector to pay social security contributions. Not all initiatives in this typology have been implemented at the national level. For example, a more localised initiative was introduced in Vilnius, Lithuania by the local municipality in which sport organisations were exempt from building rent, land taxes, sport equipment rental costs for six months.

Changes in broadcast agreements and obligations have also been implemented. These have aimed to account for cancelled and postponed events and agree payment structures for the broadcast of rearranged and upcoming events. This approach has been particularly prominent in the case of football broadcasts, with leagues and football associations in countries that were forced to cancel or postpone matches reaching bilateral agreements with broadcasters over contractual agreements. For example, in Germany, the Deutsche Fußball Liga reached an agreement with its broadcast partners for the payment of fees in tranches, partly payable upfront and partly payable for when competition resumed. In France, an agreement was reached across the Ligue de Football Professionnel and broadcasters BeIN Sports and Canal+ over rights payments, with broadcasters paying a slightly reduced amount for any matches that had already taken place. A state-guaranteed loan of approximately 224.5 million EUR was also agreed to cover the remaining shortfall in broadcast revenue caused by the termination of the 2019-20 season. These agreements with broadcasters generally helped leagues avoid the threat and cost of legal action by sport broadcasters.

Other initiatives use legislative changes to protect organisations against unexpected costs, most notably in changing rules around tickets reimbursements. Measures in Member States such as Germany, Italy, and Poland have made it possible for vouchers to be offered in lieu of cash refunds to protect organisations from having to unexpectedly refund tickets for events that were either cancelled or postponed. These measures tended to be implemented by national governments.

Perceived effectiveness

As seen previously in relation to the provision of grants and funds, measures that reduce the financial obligations of sport organisations have been supported by stakeholders due to the financial benefit they provide. Stakeholders generally felt these were valuable, helping them maintain services, keep hold of staff, and remain solvent. However, other stakeholders noted that revenues for some organisations have completely stopped due to the pandemic, meaning that measures that reduce obligations may not sufficiently alleviate serious cash-flow difficulties. In these cases, cash grants and funds were still thought to be needed alongside specific reductions in obligations, in order to support organisations to recover lost revenue and facilitate any required restructuring of operations and business models.

While these measures were generally perceived as very effective, stakeholders noted that the different mechanisms or approaches would have varying effects across linked organisations according to their role. For example, deferrals or exemptions in rent repayments or broadcasting requirements would potentially reduce income for other organisations, such as freeholders and broadcasters, whilst providing vouchers for cancelled or postponed events would have an impact on individuals that initially bought those tickets. This requires measures to be balanced, accounting for a range of situations and needs. A further theme was that while the temporary reduction of obligations would provide an initial positive effect for sport organisations, they are not a long-lasting solution and would be limited in the future by the size of government budgets.

3.6. Extension and adjustment of pre-existing support measures

This section considers measures that extend and adjust previously developed initiatives and/or budgeted money to support organisations during the pandemic.

Scope of measure or initiative

The support in this area has generally involved extending or adjusting a grant or fund, often in practice operating similarly to new funds or grants (see section 5.4). Two slightly different approaches have often been taken to amending existing approaches, either updating these to meet increased need or demand or focusing on providing additional flexibility to allow organisations to spend funds as required.

Approaches focused on adjusting support measures to meet new need and demand often still required considerable funding to various groups due to the extent of requirements. For example, the European Olympic Committees (EOC) has continued to provide its Olympic cycle funding to National Olympic Committees (NOCs) through normal routes but has been able to temporarily increase and extend such payments.

This has been particularly important given the postponement of the 2020 Tokyo Summer Olympics[49] (see case study 3). An additional 1.1 million EUR has been shared equally among the 50 European NOCs, enabling them to sustain additional costs in this period, including athlete preparation, materials and equipment, NOC administration and communication and advocacy. A further 1.4 million EUR has been made available to support NOCs with specific requests, which will be paid on a case by case basis to support NOCs with issues that could not be covered by the initial funding.

Often the requirements attached to the funding have been adjusted to allow more flexibility for organisations to spend money in ways the most appropriate ways given the current pandemic. One example is the 'HatTrick' initiative (see case study 8), funded by UEFA, which provided 236.5 million EUR to help member associations meet the challenges of COVID-19 in their countries.[50] This funding is usually distributed to the national associations to cover running costs and to help develop specific and targeted areas of domestic football. UEFA adjusted the funding rules to allow each association to set its own priorities considering the negative impact of the pandemic on the sport in each area.

Perceived effectiveness

Stakeholders felt that adjusted and expanded pre-existing measures helped organisations continue operating during the pandemic, despite potentially reduced revenues and increased costs. Although the money allocated via this support measure was not 'new' in many cases, the increased flexibility around how funds could be spent meant that organisations were able to repurpose the money to provide focused support where required. As measures were pre-existing, stakeholders found it more efficient to receive money than through new schemes. Not only could existing schemes be adapted quickly, but would not have additional set-up costs and requirements, or necessarily require new rules around application and eligibility to be established.

An additional consideration was that extending and adjusting pre-existing measures may be more sustainable than setting up new sources of finance or temporarily reducing obligations. As budgets already standardly include these initiatives, it may be easier for these to continue instead of developing emergency or temporary financing options. While this approach was perceived to be more sustainable, there was still a concern that possible future budgetary constraints may reduce their viability. As a result, stakeholders were in favour of diversifying funding sources in general, with organisations increasing internal revenue sources where possible to account for possible decreases in external funding.

3.7. Advancement of payments

This section covers various approaches to advancing payments, with these providing an alternative approach to meeting immediate financial requirements.

Scope of measure or initiative

The aim of advancement of payment initiatives is to help provide liquidity and financial support when organisations need it most, rather than releasing payments at a later point.

[49] Inside the Games (2020) *EOC to oversee distribution of $2.8 million to continent's NOCs.* Available at: https://www.insidethegames.biz/articles/1095386/eoc-28-million-fund-tokyo-2020
[50] UEFA (2020) *UEFA releases €236.5m to support its member associations at this difficult time.* Available at: https://www.uefa.com/insideuefa/about-uefa/news/025c-0f8e784d2590-459373caedcd-1000--uefa-releases-236-5m-to-support-its-member-associations/

This reduces the risk of exposure to financial adversity. The approach taken for advancing payments tended to be similar, although the exact focus and bodies involved differed depending on local, regional or national considerations.

National bodies, whether governments or sport organisations often used this approach to work across a range of stakeholders. The French National Sports Agency moved forward the payment of public subsidies to sport associations. This helped to limit the extent to which sporting federations and associations were forced to take out loans, cut costs, and make staff redundancies in response to the COVID-19 related crisis. In Spain, the Spanish High Council for Sports advanced the payment of grants to sport federations ahead of schedule, so that money could support organisations as quickly as possible.

Similar action also happened across Member States. UEFA brought forward benefit payments to professional football clubs (see case study 8) which had been due on the completion of EURO 2020 qualifier matches. Almost 68 million EUR was advanced to clubs ahead of these matches taking place. In total, the payments ranged from 3,200 EUR up to 630,000 EUR and reached 676 clubs across all of UEFA's 55 member countries.

Perceived effectiveness

Although these initiatives simply involve the early release of pre-agreed payments, stakeholders welcomed the clear benefit of receiving this money early rather than according to the original payment schedules. Governments and organisations that are financing these initiatives also outlined that because the funding had already been committed, no new money would have to be raised to finance these initiatives in the short-term, potentially leaving capacity available for implementing other measures or initiatives.

Although stakeholders receiving advanced payments were positive about this approach, some organisations responsible for releasing this financing were concerned that it may lead to subsequent budgeting difficulties for beneficiaries. Organisations may face a longer period until the next scheduled payment, with limited funds to support themselves during this period. While providing necessary short-term financial relief, as with other individual measures, there was a stated need for a coordinated approach to ensure long-term financial viability.

3.8. Furlough schemes

This section considers furlough schemes that have been used to support individuals working in the sport sector. The aim of this approach is to support employees by paying a proportion of their normal earnings in situations where employers cannot afford to continue paying employees in full due to reduced work and revenue. This supports organisations to retain employees that they otherwise may have made redundant.

Scope of measure or initiative

Furlough initiatives have predominantly been used by governments to support employees across economic sectors, including sport, with numerous schemes implemented across EU Member States. There have also been schemes that have been developed to target specific sectors such as the arts, tourism and sport, where revenue streams have been particularly affected by social distancing rules and restrictions on public gatherings.

Perceived effectiveness

Although furlough schemes are not necessarily specific to sport, they have still been important for supporting the sector. Stakeholders highlighted that state financed schemes have helped them avoid layoffs and associated costs, including the need to rehire staff. The initiatives also allow for longer-term planning by providing employers greater flexibility as they know that when revenues begin to increase again, they can rely on their existing workforce, and simultaneously reduce costs in the short-term. Furlough schemes have not necessarily been used by all organisations in the broad sport sector, with some large-scale sport retailers not doing so as they wished to keep employees directly employed and/or avoid potential negative publicity.

Stakeholders were uncertain about how sustainable and realistic it is for furlough schemes to continue providing support over the long term. Government budgets are not unlimited, with many competing demands in a time of crisis. As a result, stakeholders were concerned these schemes may end before restrictions are fully lifted. Were this the case, stakeholders were worried about unemployment in the sport sector if alternative support measures were not implemented.

To limit the impact of such a situation, stakeholders suggested focused support to sport organisations on remodelling operations and ensuring staff employment when furlough schemes finish. Other suggestions included providing opportunities for furloughed staff to retrain and learn new skills, to allow continued employment in the sector where possible. As with other measures, stakeholders reflected that furlough schemes can only provide a short-term fix to what could be a long-term concern relating to the pandemic.

3.9. Allowances for self-employed, freelancers and athletes

This section concerns allowances made available for the self-employed, freelancers and athletes. The aims of such initiatives are similar to the furlough schemes, helping provide guaranteed income to those whose incomes have been reduced due to the pandemic.

Scope of measure or initiative

These schemes tend to provide direct support to individuals that do not have the protections afforded to them by formal employment and are not necessarily eligible for normal furlough initiatives.

Most of these measures have been general schemes supported by national governments and applied across many different economic sectors. As an example, the French government has introduced a short-term unemployment fund worth up to a maximum of 5,440 EUR a month or 84% of net normal income for freelancers and the self-employed. This is directed at a range of sectors of the economy which have suffered the highest fall in activity due to the pandemic, including those working in public sport events.

Other schemes have been more specifically targeted at those working in the sport sector, with these being implemented at governmental levels of by large-scale sport organisations such as European or global federations. In Romania, the government set up a scheme to specifically support freelancers and those working under 'sport activity contracts' so that they could benefit from the same provisions as those working under individual employment contracts. This provided 75% of average gross income for many athletes, trainers, and physicians.

Further initiatives have also been introduced by sport federations. For instance, World Athletics and the International Athletics Foundation jointly introduced a 500,000 USD (426,000 EUR) welfare fund to support professional athletes who lost a substantial part of their income due to the suspension of competition[51], focussing predominantly on athletes likely to be participating at the postponed Tokyo Summer Olympics. Although this was a global initiative supporting many athletes around the world, eligible European athletes could apply to the fund to receive a grant worth up to a maximum of 4,000 USD (3,406 EUR) to help cover basic living expenses.

Perceived effectiveness

Stakeholders were generally supportive of measures to support the self-employed, freelancers and athletes, albeit with less focus on these measures than larger-scale approaches such as general furlough schemes.

The main concern surrounding such initiatives was that there are no central records of self-employed individuals or freelancers working in the sport sector, unlike with furlough schemes for those in formal employment. This makes it more difficult to distribute funds to those who have the greatest need. There had been frustrations around complicated application processes and unclear public awareness campaigns with these potentially limiting the effectiveness of this approach particularly when implemented at a large scale. These issues were felt to be less of a problem when schemes were targeted, such as those focussed on specific groups of athletes, coaches or trainers, where the total number of applicants was smaller, and it was easier to identify those requiring support.

Much like the furlough schemes, these initiatives tended to be regarded by stakeholders as effective short-term fixes, although limited as long-term solutions. Again, concerns from stakeholders often centred around the length of time such schemes could last, and whether this would be enough time for certain parts of the sport sector to recover sufficiently and return quickly to previous levels of employment. As with furlough schemes, stakeholders reported the need to consider staff retraining should employment be at risk across the sector, with long-term concerns that if this did not happen there could be a significant loss of skills and experience in the sector.

3.10. Information resources and guidance

This section reviews the effectiveness of measures to provide sport organisations with additional information resources and guidance.

Scope of measure or initiative

Information provision generally aimed to support organisations in two ways, either by providing guidance or support on meeting health and safety requirements or on finance or broader organisational issues relating to COVID-19 and any related regulations. While not providing the direct financial assistance that stakeholders saw as paramount, the provision of information and guidance supported sport organisations in operating as effectively as possible during the pandemic while potentially allowing them to return to pre-pandemic financial levels as soon as possible.

[51] World Athletics (2020) *Athletes now able to register for support from welfare fund.* Available at: https://worldathletics.org/news/press-releases/athlete-relief-fund-criteria

Many organisations have been supported with guidance and support around safety protocols, such as those provided to national sport bodies by the Belgian and Dutch National Olympic Committees. This support provided advice on maintaining best practice on organising events and carrying out sports safely within the context of the pandemic. Similar approaches have been widespread across Member States and been provided by various bodies, including governments, sport federations and through various networks.

Other initiatives have sought to support organisations to innovate and access new revenue opportunities. For example, the French Sport Ministry actively supported and financed research and development programmes to help organisations access economic opportunities relating to health, sustainable cities, the digital economy, and the circular economy. Similarly, a scheme supported by the Dutch Government set up an innovation fund for sporting organisations and entrepreneurs to build understanding around how to utilise new technologies to help create new business opportunities. Another fund supported by the Dutch Government provides guidance and support to sport businesses to help them to renew their business models and continue to be successful within COVID-19 related restrictions.

Perceived effectiveness

While not providing direct financial assistance, stakeholders suggested that information and guidance would support sport organisations to be more prepared and capable of operating during the pandemic. Stakeholders welcomed that this approach potentially provided long-term benefits, allowing organisations to grow capacity and skills in new or diversified areas (such as digital) and react to the pandemic by following best practice in safe working and to update working practices. This was perceived to be beneficial in potentially reducing reliance on other state financed initiatives to support them during the pandemic over the longer term.

One theme mentioned by stakeholders was that these initiatives have mainly focussed on sporting businesses and professional sports, with less direct focus on supporting grassroots organisations. Some felt local clubs would also benefit from advice on how to operate safely during the pandemic, as well as from further guidance on engaging members using social media and the internet. The latter was felt important given concerns from local sport clubs concerning the potential financial and social effect of reduced membership.

3.11. Other measures and initiatives

Whilst the typologies discussed above broadly cover the majority of initiatives that have been introduced to support the sport sector in the context of COVID-19 to date, there have been other, often bespoke, approaches taken to meet needs in specific contexts. These have typically tended to be more specific to individual sports or segments of the sport sector, where more tailored support is possible.

One example is the voucher scheme introduced by the Romanian Government that encourages 30,000 children to participate in sports by granting them a 100 EUR voucher to purchase sport equipment on the condition that they remain a member of the club for at least a year (see case study 4). Measures such as this can provide specific support that simultaneously assists both grassroots sport organisations and sport retail organisations.

Other measures also include specific legal or regulatory changes such as UEFA's temporary emergency measures to adjust the Financial Fair Play rules that govern football club finances (see case study 8). This aims to ensure that clubs have more time to quantify and account for unanticipated loss of revenue due to COVID-19 and are not unduly penalised for breaking rules around financial mismanagement.

Further initiatives also include policies that indirectly impact the sport economy. These take a variety of different forms given the range of types of sport organisation. Specific approaches have included ensuring broadband availability to support online and home working, and adjusting rules governing online retail businesses to support businesses move more of their sales online.

4. ADDITIONAL STEPS

This chapter examines potential additional steps relating to the economic impact of COVID-19 on the sport sector, focusing on short-term priorities and longer-term consideration. Information is based primarily on feedback from stakeholder interviews and surveys, supplemented with desk research results where relevant.

4.1. Short-term priorities and gaps

Information provided throughout this research highlights the considerable impact of COVID-19 on the sport sector to date and the likely severity of the pandemic in the future. Given this situation, stakeholders immediate focus was on dealing with financial issues in the short-term, minimising the effects where possible to ensure longer-term financial viability. They recognised that flexible approaches to funding had already been adopted and felt this needed to be maximised in the future so that unnecessary barriers were not in place. Important elements were ensuring that funds continued to be available, making sure that the sector could access both sport-specific and more general funds, and ensuring that diverse funding sources were available to account for the range of stakeholders across the full, broad Vilnius definition.

Some stakeholders noted that considerable financial support was unlikely to be available to the same extent indefinitely, making longer-term viability dependent to a considerable extent on successful control of the virus. A minor theme was that there is a risk that the sector becomes overly dependent on public funding, potentially resulting in financial issues if public spending reduces in the future.

A general theme throughout interviews was the need to reduce the potential for funding or financing gaps by taking a fully coordinated approach. Coordination was felt necessary in three areas, namely across organisations, across Member States, and in enabling positive links to policy and decision-making.

The need for coordination across sport organisations was based on the shared understanding that the economic impact of COVID-19 differs in severity or duration across organisation and that a broad range of specific measures or initiatives are required. One theme was the need for fair coverage and ability to access funds across organisations. There were concerns that smaller organisations, particularly those that were not part of wider networks, may miss out on accessing finance for several reasons. Firstly, there was a perception among some stakeholders that financial support was more likely to be provided for large, professional organisations than smaller, more grassroots bodies. Secondly, there was a concern that even when there were general funds available, that smaller organisations might not always be aware of these options. Thirdly, even when aware of options, it was possible that smaller organisations might lack resources or skills to apply successfully.

The importance of linking smaller organisations to opportunities was not generally seen to mean that larger organisations or sports should be ignored, more that larger bodies had sufficient resource to access funds. Stakeholders recognised that large-scale organisations were important both in their own right and due to their links to grassroots participation and other sectors. What was key was that the inclusion of these bodies should not be at expense of the wider sector.

Coordination across Member States was another important theme, with the pandemic and the different nature of pandemic responses in different countries suggesting to stakeholders a need for a joined-up approach. On one level, they felt they would benefit from a general overview on how the sector was reacting to the pandemic in other countries and what they could learn from these cases. With the situation changing quickly, they wanted to have sufficient knowledge on the basic picture across the EU-27. On a separate level, there were more specific areas where coordination was felt to be valuable. Stakeholders wanted to have detail on particular actions, measures or initiatives in different Member States, including, but not limited to, funding sources (as seen earlier in this section). An additional theme was that they sometimes, particularly those involved in professional events across Member States, found it difficult to plan events or activity as they lacked sufficiently detailed information on what organisations in other countries were doing. Coordination of planning across countries was potentially complex due not only to the varying responses to the pandemic but the need to harmonise schedules across different levels and, potentially, types of sport.

One approach to coordination was the informal working group on sport across Norway, Finland, Sweden, Denmark, Iceland and the Netherlands, based on their similar sporting cultures. This group shares information on current issues and measures/initiatives, with participants feeling that information was shared more readily in this forum than at a European level. This raises the question as to the best approach to take to coordination across Member States, whether an overall, Europe-wide model is appropriate and/or regional or typology-based approaches. This requires consideration of the precise objectives of any coordination effort, the likely stakeholders and their specific needs.

A final theme was the need for coordination with policy and decision-making. There was a concern that sport was not prioritised to the required extent in general, with other sectors being perceived to receive more attention, most notably the culture sector. One key theme was the feeling that policy makers were not aware of the importance of the sport sector, lacking basic information on the size and scale of the sector. Interviewees noted that politicians did not always know the employment and revenue figures for the sector, despite these often being widely available.

The main priority to improve links with policy was to start planning concrete to strengthen the sport sector, enabling it to speak with one clear, consistent voice. One approach was to discuss different potential models and how these could be developed in different Member States. An option suggested was a 'Scandinavian model' based on a strong internal structure and clear external links to other sectors, primarily public health. This was seen to create the climate for increased political and financial support across sectors, linking into diverse policymakers to raise awareness of the importance of the sector. While actually implementing new models is a long-term goal, initial steps could be taken to examining the possible viability of different models. Additional approaches included more immediate actions to disseminate clear information highlighting the importance of the sport sector using economic data where possible and stressing the full range of benefits delivered, including links to public health and the green agenda.

A particular consideration among organisations working with professional sport was developing coordinated initiatives to tackle online piracy, protecting the value of sport-based broadcast deals when revenue streams for professional organisations had been affected by reductions in ticket sales. This was felt to largely require legislative action, needing coordination across organisations and policy makers, and potentially have notable subsequent benefits for grassroots sport.

Each of these three areas of coordination and the paramount need to access funds were perceived as dependent on clear communication channels being established and widely used. The immediate priority was to focus on funding mechanisms and, in particular, sport organisations that may be more difficult to reach (primarily smaller and/or amateur organisations). A range of approaches were suggested, including using existing networks to cascade information, centralised digital repositories and more bespoke approaches.

4.2. Longer-term considerations

This short section outlines additional measures, initiatives and support that could be provided, with a particular focus on approaches that could be considered in the longer-term to strengthen the sector.

One main theme was the need for immediate coordination actions to be built on by having clear, substantial plans in place across EU Member States for the sport sector, with a potential role for the European Commission to facilitate this process. Initial development of any planning was perceived to be a short-term priority, with this process and subsequent implementation continuing in the longer-term. A minor theme was that there was insufficient research on the sector, one stakeholder specifically noting the evidence gap on sustainable programmes.

A longer-term aspiration was to ensure that sport was fully embedded with other sectors, building on immediate work in this area (as highlighted in the previous section) to ensure sustainability. This would require moving beyond short-term awareness raising and creating initial links to more systematic work, including enabling the voice of the sector to be heard on cross-cutting issues and incorporating relevant sport bodies in relevant planning activities. There was a perception that other sectors would be re-examining their plans for the post-pandemic future and this may provide a suitable opportunity for collaboration. As in the short-term priorities, links with public health and the environment agenda were seen as important given their connections with sport and importance across Member States.

Long-term links with the health and green agendas were seen to raise the potential importance of grassroots sport participation, reducing demand on the health service and transport system. Few concrete suggestions to encourage participation were made by stakeholders as discussion focused on immediate measures to deal with the financial implications of the pandemic. One theme was to ensure that sufficient sport infrastructure was developed to meet public health needs, potentially building on increased awareness of the importance of basic infrastructure such as urban paths and walkways during the pandemic as a result of increased usage.

5. Conclusions and Recommendations

This chapter outlines the conclusions and recommendations for this study, based on the full range of data collected throughout. Conclusions and recommendations are provided separately, with a particular focus on the latter.

5.1. Overall conclusions

The following section contains the main conclusions of the research, focusing on the economic impact, with additional information on measures and initiatives also included.

Economic Impact

The core of this report outlines the potential economic impact of COVID-19 on the sport sector for the whole of 2020 (i.e. including pre-pandemic and subsequent phases). Three separate scenarios were provided to compare the potential effect of COVID-19 restrictions across 2020 to a reference scenario for the same year without the pandemic. Results for each scenario across the sport sector in the EU-28 and EU-27 for 2020 are summarised in the following table (direct effects, broad definition):

Table 15 Impact of COVID-19 on the sport sector, 2020

EU level	Scenario	Sport-related GPD		Sport-related employment	
		Million Euros	Percentage of sport-related GDP	Employees in persons	Percentage of sport-related employment
EU-28	Higher	56,930	15.7%	1,099,526	17.0%
	Medium	49,635	13.7%	961,997	14.9%
	Lower	45,596	12.5%	883,912	13.7%
EU-27	Higher	47,430	15.3%	844,773	16.2%
	Medium	41,404	13.3%	740,529	14.2%
	Lower	38,100	12.3%	681,588	13.1%

This suggests that the sport sector will be considerably affected during 2020 as a result of the pandemic. This is largely the case regardless of the extent of COVID-19 measures that are taken, although negative effects increase alongside increasingly stringent imposition of measures (with greatest effect in the higher scenario).

The overall impact of COVID-19 across the EU-28 is estimated at:

- Between 45,596 million EUR GDP and 56,930 million EUR GDP and between 883,912 and 1,099,526 employees in persons in direct figures.
- Between 79,641 million EUR GDP and 99,168 million EUR GDP and between 1,279,274 and 1,588,456 persons when indirect figures are included to provide total data.

- Depending on the scenario the percentage share of direct sport-related GDP differs by between 12.5% and 15.7% compared to the reference scenario (13.7% and 17.0% for employment).

The overall impact of COVID-19 across the EU-27 is estimated at:

- Between 38,100 million EUR GDP and 47,430 million EUR GDP and between 681,588 and 844,773 employees in persons in direct figures.
- Between 63,774 million EUR GDP and 79,130 million EUR GDP and between 996,807 and 1,232,716 persons when indirect figures are included to provide total data.
- Depending on the scenario the percentage share of direct sport-related GDP differs by between 12.3% and 15.3% compared to the reference scenario (13.1% and 16.2% for employment).

Member States are affected differently, with this largely depending on the size of total sport related GDP per country, the relative importance of the total sport sector, the relative importance of each sector within the Vilnius definition for a country, and existing or possible measures taken as a result of the pandemic.

- The largest estimated reductions in the Euro value of direct sport related GDP occurs in Germany, accounting for almost 40 percent of the projected EU-wide decline, due to the size of their overall economy and the sport sector.
- Other Member States with large estimated declines include the United Kingdom, France, Italy, Spain and Austria (where the sport sector makes up a substantial proportion, 4.22%, of the direct economy in the no-COVID reference scenario)
- All Member States (except for Czechia) are estimated to see their share of sport-related GDP decline by at least 10% in 2020 under a 'higher' scenario of more stringent measures.
- The largest estimated reductions in the overall share of direct sport-related GDP are generally seen for the Baltic States, where the sport sector is smaller than in other Member States but is particularly affected by COVID-19.

Member States with larger sport sectors are most likely to be affected by increased COVID-19 regulations in absolute terms primarily due to the size of their sector. The nature of the sector across countries also results in different relationships between the direct and total effects (the latter including indirect or supply network effects). An impact on direct effects in many smaller Member States, such as the Baltic countries where there are close EU links, is more likely to have considerable resultant impact on supply networks than in larger or less linked countries (including Austria, Cyprus, France, German, Greece and Spain).

The impact of COVID-19 varies considerably across sport sectors, with travel restrictions, cancelled events, retail and sport facilities closures resulting in widespread impact. The core sport sector of 'sporting services' is estimated to show a reduction of around a fifth to a quarter depending on the scenario (lower: 21.5%, medium: 23.1%, higher: 26.7%) when compared to a hypothetical no-COVID reference scenario. Accommodation and food services (lower: 43.6%, medium: 47.6%, higher: 53.4%) as well as both water (lower: 42.8%, medium: 46.7%, higher: 52.4%) and air transport (lower: 44.2%, medium: 45.5%, higher: 48.5%) are the most heavily affected in terms of proportion reduction.

Initiatives and Measures

The main theme across stakeholders was the immediate and continuing impact of the pandemic across the sport sector, being seen to have particularly widespread consequences for organisations and individuals directly working in sport. Financial situations were immediately difficult when the pandemic began, with clear drops in revenue while many monetary obligations still had to be met.

As a result, initiatives or measures providing direct, immediate financial support were perceived to be vital, primarily via new grants or funds or extending existing similar provision. Other similar financial approaches were welcomed, including reducing or postponing financial obligations, providing furlough schemes, and implementing focused financial support for athletes, volunteers, and other staff. Support and guidance were also seen as beneficial both in initially reacting to pandemic requirements and helping access financial support.

Stakeholders generally wanted to be aware of different initiatives and measures across the EU, understand what was working or not, and be able to prove the value of their sport sector, helping establish broader links with public health, the green agenda and other relevant sectors.

A further consideration was the need for coordinated work across sport organisations and Member States to alleviate financial concerns in the short-term and strengthen the role of the sector in the long-term. There was a connected recognition of the breadth of the sport sector and the resultant need to ensure all types of organisation are supported and involved, including grassroots and smaller bodies.

5.2. Study recommendations

This section provides several recommendations, focusing on how the European Commission and the sport sector can deal with the economic impact of COVID-19. These recommendations are deliberately aimed at a broad audience, including the Commission, public authorities, governing bodies, national federations, and both sport organisations and groups across the spread of core, narrow and broad Vilnius definitions. Recommendations are based on information provided throughout the research, in particular the desk research and the responses to the WPS call for information on the implications of COVID-19 on the sport sector. As outlined in the data limitations (see section 4.4), these are not based on fully representative feedback across the full sport sector.

It is important to note that the sport sector is not a unified group of organisations but is highly segmented. This includes differences in terms of role (Vilnius definitions), the type of organisation, whether professional and/ or grassroots, staffing (professional, volunteer), type of funding accessed, location etc. Feedback also suggests the importance of disability sport, different levels of coaching, and the economic role played by large private organisations. COVID-19 will have affected different types of organisations in different ways, requiring a flexible approach to implementing any recommendations.

Recommendations are provided in terms of a general assessment of importance, with the most immediate priorities listed at the start. Given the impact of COVID-19, this should not be interpreted as suggesting the later recommendations as not important.

- **Continue to publicise and make available funding streams.** A wide variety of EU funding streams may be currently available to the sport sector, including Next Generation EU, Coronavirus Response Investment Initiative (CRII), and Coronavirus Response Investment Initiative Plus (CRII+). However, it is important to highlight how sport can contribute to the objectives of the different programmes. Information on funding streams in other sectors, e.g. public health, research, youth, economic or environment, should also be provided, covering existing and upcoming funds. State Aid requires focus so the sector can access the right frameworks and not be affected by ceiling requirements. Notably, access to regional funds and other streams should be fully incorporated, including the Cohesion Policy funds.

  While it is not possible for all sport organisations to access all these funds, the importance to the sport sector should be stressed both within the EC, national authorities and to the sector itself. Guidance and support should be updated regularly, so that the contribution of sport to different sectors is leveraged in funding bids. In the promotion of funding streams, particular attention should be paid to organisations with access to limited alternative funding opportunities. A variety of approaches to publicity should be taken to ensure the widest possible uptake, including using existing networks (for example, the SHARE initiative) and key stakeholders as appropriate. There should be clear guidance, if possible, in all relevant funding documentation or by awareness-raising initiatives, to ensure that sport stakeholders are aware whether and how they can apply, regardless of whether they are directly targeted or not. Opportunities should be transparent and widely disseminated, so grassroots and professional organisations have the same opportunity to access relevant funds as other bodies, with this continuing long-term into any recovery phase and beyond.

- **Investigate development of a coordinated EU plan, including for the recovery phase.** The possibility of developing a clear plan for sport through any pandemic and recovery phase should be investigated. This may involve adapting upcoming plans (for example, the new EU Work Plan for Sport) or the development of a separate and bespoke plan for the sport sector. The exact approach is likely to depend upon likely timescales for existing work on harmonisation across the EU, and should aim to strengthen the sector, including via direct coordination of activities at a EU level and supporting Member States and other bodies where required. Harmonisation of travel, testing, events (see separate recommendation) should be included. The full range of sport organisations should be considered according to the Vilnius definitions.

  Plans should be clearly linked to financial support and based on clear evidence. Exact stakeholder needs should be considered before any decision is made to proceed with plans, with the requirement to future-proof any plan being particularly important. Any plan should be sufficiently flexible to meet future needs and avoid attempting to cover areas where substantial amendments may be required. They should also consider the skill sets and knowledge of sport organisations and avoid any undue centralisation, allowing organisations to develop and implement approaches based on their situation.

Any plan should involve other sectors where possible as well as focus on the recovery phase. They should also take into account the strong likelihood that support will be required in the event of large-scale liquidations or defaults. Planning may require reassessment of current research areas and priorities, bringing plans forward and incentivising working groups and existing research. This is likely to require joint working in relation to Erasmus+, Horizon 2020, the European Research Council and other relevant organisations.

- **Promote macro-economic data on the importance of the sport sector.** This should include data to show both the importance of the sport sector as part of the overall economy and the impact of the pandemic on the sector. This should include information from this report and other sources, including other existing reports (for example, from specific Member States, sectors or stakeholders) and EU-wide data, such as Eurostat, Eurobarometer and similar surveys, ensuring the full range of possible economic data are provided. Links with public health, the green agenda and other sectors, including tourism, retail, construction etc, should be clear, highlighting the positive value and clear financial benefits of sport and physical activity to these sectors.

  Promotion should be targeted at policy staff and politicians, so they are aware of the economic importance of sport, and at the sector, providing data to support funding applications. Information should be regularly updated, considering the short-term unpredictability of the pandemic and the European financial climate. It should be easily available so all stakeholders can access user-friendly information and promote the financial value of sport. A digital observatory that is updated regularly should be considered, potentially including sending e-mail notifications of new content to those agreeing. While providing clear economic information is vital, this should be within a broader context of the value of the sport sector. Information on other benefits, for example health, community cohesion and inclusion, should be included as relevant background. Given the potential length and impact of the pandemic, the possibility of more regular EU surveys (for example, by Eurostat, Eurobarometer etc.) should be considered.

- **Embed sport in economic and social development strategies, and leverage broader cross-sectoral links, especially with public health, green agenda and other relevant areas.** The nature of the pandemic highlights the importance of linking sport with other sectors, including them as stakeholders in planning as required and leveraging the cross-cutting nature of the sector. Public health and wellbeing are likely to be particularly important given the nature of the pandemic, as is the green agenda including sustainability. Other sectors such as tourism, research and innovation, media, transport and active mobility, education, social engagement and cohesiveness, construction, and retail should also be considered. Interest in engaging populations in physical activity as a low-cost preventative public health approach (with links to the active travel and green agenda) may increase should the economic situation result in more pressure on public spending and health budgets. This may help access additional funds and support for grassroots sport organisations.

Any focus on public health should stress the economic benefits and wider societal impact of physical activity, covering both physical and mental health, highlighting the relevance of sport in ensuring resilience during any pandemic phase and enabling recovery throughout later phases, drawing on existing examples. By encouraging more sport and physical activity, it promotes better physical and mental health, builds resilience and, in line with WHO and EU recommendations, is a major response to the societal challenges arising from poor diet, an inactive lifestyle and population ageing. It also facilitates any transition from reactive healthcare systems to those that anticipate and prevent potential issues in advance.

This should include the promotion of sport and physical activity in economic and social development strategies and practice, including smart specialisation strategies and relevant regional or local development strategies where applicable. For 2014-2020, 102 European regions had included sport and physical activities in their smart specialisation strategies. For example in the South Netherlands region, sport is an inherent part of the existing smart specialisation strategy. The region aims to further develop a number of emerging clusters and to promote cross-over between clusters. With a view to deliver innovative solutions to societal challenges including health, demography, and welfare (which organically incorporate sport and physical activity).

- **Ensure that funding opportunities from the Sport Chapter in the Erasmus+ Programme are sufficiently flexible.** The Erasmus+ sport programme provides opportunities for the grassroots sport sector and amateur sport to mitigate against the impact of COVID-19. Stakeholders have noted that their ability to make the most of existing or new opportunities will depend on their ability to access funding and complete programmes during the current pandemic situation. A key theme in feedback was the need for flexibility, allowing delivery to change to meet the new pandemic situation rather than adhering to initial plans, extending deadlines for existing and new programmes, clarifying whether funding is still available when Erasmus+ programmes or events have been postponed, reducing administrative requirements, and providing information on upcoming funding sufficiently in advance. Providing additional funding to meet the considerable needs of sport organisations in the pandemic should be considered. Specific guidance on how Erasmus+ sport funding can be used to mitigate against the impact of COVID-19 should be considered.
- **Supporting the coordination of sport events across Member States.** Ensuring that events are accurately rescheduled is important, particularly for the professional sport organisations and linked sub-sectors, for example sport events and tourism. This process will benefit from strategic oversight to account for the situation across all Member States, the various levels involved (that is, local, regional, national, European, international) and the staged nature of qualification events. Any coordination should account for travel and safety requirements, including the economic benefits of spectator attendance.

This task is made more complex as preparation and training needs are paramount, particularly for professional sport, as are the views of non-governmental bodies. Varying requirements on restriction of movement will need to be considered, including quarantine. Changes to the timetable may also have legal implications, potentially affecting sponsorship and broadcasting deals as well as player contracts and transfers.

Support the development of information sharing and dissemination across stakeholders. Given the ongoing and future impact of the pandemic there is a need to continue maximising information sharing and dissemination across stakeholders. This should include sharing both within the sport sector and across other sectors given the links between sport and other areas of the economy. Any plans for wider information and dissemination should include grassroots activity as well as professional sport. Communication approaches should be streamlined where possible, for example ensuring that single points of contact are in place where beneficial. Building on existing networks with proven approaches to engaging organisations and disseminating information will be key. Due to the nature of the pandemic, digital information sharing is likely to be important with digital channels needing to be fit-for-purpose, with centralised approaches adopted to encourage discussion as/if required. Standardised formats should be used, so stakeholders can quickly assess and compare measures. Online platforms should be considered, whether targeted at the general population (for example, to encourage participation in physical activity) or at key groups. Particular attention should be given to communication with grassroots organisations.

Stakeholders noted a range of areas where they felt specific guidance would be beneficial including training during the pandemic, general safety mechanisms, approaches to risk management, athletes rights during lockdown, athlete travel, keeping/identifying coaches, adapting to online delivery, accessing resources directly related to COVID-19 (for example, PPE or testing equipment, particularly for high-level performance athletes) and issues relating to relevant EU legislation. Due to the rapidly changing circumstances, sharing existing guidance, as opposed to creating new information, will be vital. This should be short, clear, and publicised both quickly and widely. However, this does not mean that large-scale issues cannot be tackled, for example supporting smaller sports to increase and diversify income through examining additional financing, for example, digital broadcasting models, and protecting existing broadcast deals through relevant guidance and support around issues relating to online piracy. In the short-term, sharing information on the effectiveness of measures will continue to be vital. This includes positive examples of increased physical activity during lockdown,[52] and the added value provided by dealing directly with the pandemic, for example storing medical supplies, adapting stadia as test centres, sponsoring medical research etc. These will need to be integrated carefully to avoid incorrect perceptions that the impact of COVID-19 on the sector is minimal compared to elsewhere.

[52] Sport Ireland (2020) *Impact of Covid-19 Restrictions on Sport and Recreational Walking.* Available at: https://www.sportireland.ie/sites/default/files/media/document/2020-04/impact-of-covid-19-restrictions-on-sport-and-recreational-walking.pdf

- **Use and develop digital options as integral element of existing sport offerings.** The response to the pandemic has shown the importance of digital measures, supporting grassroots activities and allowing businesses to change delivery. Various online tools have already been developed, covering publicity, online training, and crowdfunding, including both European (for example, the European Commission's #BeActiveAtHome) and Member State based initiatives. Access to digital resources differs across and within Member States. Older people and more disadvantaged communities are likely to have less access, while individual sport requiring little equipment such as general fitness or running are more immediately conducive to online approaches than team-based sport requiring equipment.

  Attention should be paid to online approaches as a way not only of taking part in sport but maintaining engagement at a club level to facilitate quick recovery in post-lockdown phases. Digital options need to be integrated as a complementary element to provision, facilitating 'real life' involvement in clubs or elsewhere, and avoiding financial implications of falling membership. Digital is important but should not replace existing infrastructure or replace proven models of in-person provision.

- **Develop broader emergency preparedness plans.** Our research and recommendations focus on the immediate COVID-19 pandemic and recovery phase, given the clear, immediate need to prioritise supporting the sport sector during this period. COVID-19 has also led to greater awareness of other, similarly large-scale emergencies, ranging from different pandemics and climate change to terrorism or global conflict. While it is not reasonable to develop immediate plans for these specific events, lessons from the current COVID-19 phase should be recorded and consideration given to longer-term emergency planning. This may include involvement in any future European or international discussions so the needs of the sport sector can be incorporated, and initial broad planning developed.

Finally, while the focus of these recommendations is on immediate issues relating to the economic impact of COVID-19, a long-term perspective is also required. As noted previously, feedback suggests a widespread feeling that, despite the importance of the sector, sport is not always prioritised appropriately. The current pandemic provides the opportunity to raise the sector's profile and build on cross-sectoral links. Sport and physical activity need more than ever to be included in key strategic documents and embedded across different policy areas. Vital questions are being posed which the sport sector can help answer. How do we reconfigure our city spaces? What does a post-pandemic tourist industry look like? How do we encourage a sense of community? While dealing with the immediate pandemic and financial repercussions is the absolute priority, the opportunity to get involved in these discussions now is vital. If this does not happen it may be increasingly difficult for the voice of the sector to be heard later.

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Annex two: Country Data Sheets

For comparison with SpEA, SIRC (2018) this annex holds the most relevant results for all Member States of the EU-28 in alphabetical order plus the EU-27 (excluding the United Kingdom). The reference scenario 2020 without COVID-19 is stated in the top section of the sheets, followed by the three different COVID-19 scenarios (lower/medium/higher). Reductions are reported in italic percentages and are calculated relative to the respective effect-type (i.e. direct effects are compared to direct effects and total to total). Therefore, the shares of total effects can be smaller than those of the direct effects even though total effects are larger in absolute terms.

Monetary values are reported in million euros, employees in persons. The three most affected sectors in absolute terms are reported. Some of the sector names were shortened so that they could fit into the cells.

AT - Austria

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	1,250.7 m €	6,327.2 m €	17,377.3 m €
Total Effects	1,866.0 m €	9,440.1 m €	27,061.2 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	21,170 Pers	89,290 Pers	237,634 Pers
Total Effects	27,319 Pers	115,224 Pers	325,429 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,050.4 m €	*-16.0%*	5,741.9 m €	*-9.3%*	14,715.4 m €	*-15.3%*
Total Effects	1,511.8 m €	*-19.0%*	8,576.1 m €	*-9.2%*	23,241.6 m €	*-14.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-1,501.3 m €
2nd	Sporting services, Core definition	-354.2 m €
3rd	Land transport services and pipelines	-318.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	17,355 Pers	*-18.0%*	80,485 Pers	*-9.9%*	200,897 Pers	*-15.5%*
Total Effects	22,126 Pers	*-19.0%*	103,737 Pers	*-10.0%*	277,355 Pers	*-14.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-19,248 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-5,293 Pers
3rd	Sporting services, Core definition	-5,193 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,038.3 m €	*-17.0%*	5,689.2 m €	*-10.1%*	14,382.2 m €	*-17.2%*
Total Effects	1,490.0 m €	*-20.2%*	8,501.7 m €	*-9.9%*	22,782.2 m €	*-15.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-1,705.6 m €
2nd	Sporting services, Core definition	-376.0 m €
3rd	Land transport services and pipelines	-363.1 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	17,139 Pers	*-19.0%*	79,710 Pers	*-10.7%*	196,344 Pers	*-17.4%*
Total Effects	21,806 Pers	*-20.2%*	102,753 Pers	*-10.8%*	271,569 Pers	*-16.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-21,868 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-5,998 Pers
3rd	Sporting services, Core definition	-5,513 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,011.0 m €	*-19.2%*	5,580.4 m €	*-11.8%*	13,854.9 m €	*-20.3%*
Total Effects	1,441.1 m €	*-22.8%*	8,345.8 m €	*-11.6%*	22,047.3 m €	*-18.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-2,012.4 m €
2nd	Land transport services and pipelines	-430.9 m €
3rd	Sporting services, Core definition	-424.9 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	16,623 Pers	*-21.5%*	78,102 Pers	*-12.5%*	189,150 Pers	*-20.4%*
Total Effects	21,090 Pers	*-22.8%*	100,692 Pers	*-12.6%*	262,349 Pers	*-19.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-25,801 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-6,951 Pers
3rd	Sporting services, Core definition	-6,229 Pers

BE - Belgium

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	811.5 m €	3,261.4 m €	7,944.4 m €
Total Effects	1,748.7 m €	7,028.0 m €	14,875.6 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	16,665 Pers	50,638 Pers	90,446 Pers
Total Effects	21,506 Pers	65,346 Pers	137,692 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	692.1 m €	*-14.7%*	3,050.5 m €	*-6.5%*	7,587.0 m €	*-4.5%*
Total Effects	1,442.9 m €	*-17.5%*	6,349.0 m €	*-9.7%*	13,481.0 m €	*-9.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-305.8 m €
2nd	Legal and accounting svcs.; head offices; consultancy svcs.	-100.5 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-98.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,917 Pers	*-16.5%*	46,721 Pers	*-7.7%*	83,882 Pers	*-7.3%*
Total Effects	16,793 Pers	*-21.9%*	56,131 Pers	*-14.1%*	119,369 Pers	*-13.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-4,712 Pers
2nd	Residential care services; social work	-2,561 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,953 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	682.4 m €	*-15.9%*	3,033.5 m €	*-7.0%*	7,553.2 m €	*-4.9%*
Total Effects	1,418.1 m €	*-18.9%*	6,296.2 m €	*-10.4%*	13,358.2 m €	*-10.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-330.6 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-111.8 m €
3rd	Legal and accounting svcs.; head offices; consultancy svcs.	-109.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,695 Pers	*-17.8%*	46,407 Pers	*-8.4%*	83,257 Pers	*-7.9%*
Total Effects	16,411 Pers	*-23.7%*	55,417 Pers	*-15.2%*	117,743 Pers	*-14.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-5,095 Pers
2nd	Residential care services; social work	-2,778 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-2,209 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	661.7 m €	*-18.5%*	2,995.6 m €	*-8.1%*	7,490.0 m €	*-5.7%*
Total Effects	1,362.5 m €	*-22.1%*	6,179.0 m €	*-12.1%*	13,125.7 m €	*-11.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-386.2 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-131.6 m €
3rd	Legal and accounting svcs.; head offices; consultancy svcs.	-125.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,198 Pers	*-20.8%*	45,708 Pers	*-9.7%*	82,098 Pers	*-9.2%*
Total Effects	15,554 Pers	*-27.7%*	53,833 Pers	*-17.6%*	114,677 Pers	*-16.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-5,951 Pers
2nd	Residential care services; social work	-3,174 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-2,600 Pers

BG - Bulgaria

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	32.8 m €	362.2 m €	627.4 m €
Total Effects	67.1 m €	741.0 m €	1,019.2 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	4,583 Pers	27,025 Pers	46,394 Pers
Total Effects	5,914 Pers	34,874 Pers	62,222 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	28.9 m €	*-11.9%*	341.1 m €	*-5.8%*	595.2 m €	*-5.1%*
Total Effects	57.6 m €	*-14.1%*	680.5 m €	*-8.2%*	910.4 m €	*-10.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-9.5 m €
2nd	Accommodation and food services	-6.7 m €
3rd	Education services	-6.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	3,973 Pers	*-13.3%*	25,102 Pers	*-7.1%*	43,531 Pers	*-6.2%*
Total Effects	4,846 Pers	*-18.1%*	31,008 Pers	*-11.1%*	55,596 Pers	*-10.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-1,068 Pers
2nd	Accommodation and food services	-682 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-517 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	28.6 m €	*-12.6%*	339.5 m €	*-6.3%*	592.3 m €	*-5.6%*
Total Effects	57.0 m €	*-15.0%*	676.0 m €	*-8.8%*	901.1 m €	*-11.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-10.1 m €
2nd	Accommodation and food services	-7.6 m €
3rd	Education services	-6.9 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	3,934 Pers	*-14.2%*	24,961 Pers	*-7.6%*	43,272 Pers	*-6.7%*
Total Effects	4,777 Pers	*-19.2%*	30,727 Pers	*-11.9%*	55,021 Pers	*-11.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-1,137 Pers
2nd	Accommodation and food services	-771 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-570 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	28.1 m €	*-14.3%*	336.0 m €	*-7.2%*	586.7 m €	*-6.5%*
Total Effects	55.6 m €	*-17.1%*	666.2 m €	*-10.1%*	883.8 m €	*-13.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-11.4 m €
2nd	Accommodation and food services	-8.9 m €
3rd	Education services	-7.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	3,846 Pers	*-16.1%*	24,654 Pers	*-8.8%*	42,781 Pers	*-7.8%*
Total Effects	4,622 Pers	*-21.9%*	30,111 Pers	*-13.7%*	53,955 Pers	*-13.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-1,292 Pers
2nd	Accommodation and food services	-907 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-654 Pers

CY - Cyprus

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	66.0 m €	258.2 m €	432.4 m €
Total Effects	107.2 m €	419.3 m €	692.8 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	1,275 Pers	5,780 Pers	9,668 Pers
Total Effects	1,645 Pers	7,459 Pers	14,005 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	50.7 m €	*-23.1%*	205.6 m €	*-20.3%*	364.5 m €	*-15.7%*
Total Effects	77.8 m €	*-27.4%*	343.7 m €	*-18.0%*	583.9 m €	*-15.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-29.4 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-12.7 m €
3rd	Sporting services and amusement and recreation services	-6.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	945 Pers	*-25.9%*	4,561 Pers	*-21.1%*	8,117 Pers	*-16.1%*
Total Effects	1,014 Pers	*-38.4%*	5,894 Pers	*-21.0%*	11,851 Pers	*-15.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-631 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-290 Pers
3rd	Sporting services and amusement and recreation services	-210 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	49.7 m €	*-24.7%*	202.3 m €	*-21.6%*	359.6 m €	*-16.8%*
Total Effects	75.7 m €	*-29.4%*	338.9 m €	*-19.2%*	575.6 m €	*-16.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-31.5 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-12.8 m €
3rd	Sporting services and amusement and recreation services	-7.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	921 Pers	*-27.7%*	4,488 Pers	*-22.4%*	8,008 Pers	*-17.2%*
Total Effects	969 Pers	*-41.1%*	5,797 Pers	*-22.3%*	11,694 Pers	*-16.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-676 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-290 Pers
3rd	Sporting services and amusement and recreation services	-225 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	47.3 m €	*-28.3%*	195.1 m €	*-24.4%*	349.8 m €	*-19.1%*
Total Effects	71.0 m €	*-33.7%*	328.3 m €	*-21.7%*	559.7 m €	*-19.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-36.1 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-12.9 m €
3rd	Sporting services and amusement and recreation services	-8.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	870 Pers	*-31.8%*	4,327 Pers	*-25.2%*	7,793 Pers	*-19.4%*
Total Effects	869 Pers	*-47.2%*	5,584 Pers	*-25.1%*	11,388 Pers	*-18.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-776 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-292 Pers
3rd	Sporting services and amusement and recreation services	-258 Pers

CZ - Czech Republic

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	164.1 m €	2,376.6 m €	3,220.1 m €
Total Effects	518.6 m €	7,510.1 m €	8,215.6 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	16,165 Pers	83,586 Pers	109,227 Pers
Total Effects	20,860 Pers	107,863 Pers	197,532 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	145.3 m €	*-11.4%*	2,238.4 m €	*-5.8%*	3,015.2 m €	*-6.4%*
Total Effects	448.2 m €	*-13.6%*	7,173.1 m €	*-4.5%*	7,721.1 m €	*-6.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-70.4 m €
2nd	Accommodation and food services	-46.0 m €
3rd	Motor vehicles, trailers and semi-trailers	-43.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	14,092 Pers	*-12.8%*	77,205 Pers	*-7.6%*	100,407 Pers	*-8.1%*
Total Effects	16,541 Pers	*-20.7%*	97,391 Pers	*-9.7%*	182,753 Pers	*-7.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-4,318 Pers
2nd	Accommodation and food services	-1,848 Pers
3rd	Motor vehicles, trailers and semi-trailers	-988 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	144.1 m €	*-12.2%*	2,226.3 m €	*-6.3%*	2,995.9 m €	*-7.0%*
Total Effects	443.3 m €	*-14.5%*	7,146.1 m €	*-4.8%*	7,677.7 m €	*-6.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-75.4 m €
2nd	Accommodation and food services	-51.4 m €
3rd	Motor vehicles, trailers and semi-trailers	-46.6 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,948 Pers	*-13.7%*	76,676 Pers	*-8.3%*	99,611 Pers	*-8.8%*
Total Effects	16,238 Pers	*-22.2%*	96,557 Pers	*-10.5%*	181,461 Pers	*-8.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-4,621 Pers
2nd	Accommodation and food services	-2,063 Pers
3rd	Motor vehicles, trailers and semi-trailers	-1,062 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	141.1 m €	*-14.0%*	2,200.2 m €	*-7.4%*	2,958.3 m €	*-8.1%*
Total Effects	432.2 m €	*-16.7%*	7,087.2 m €	*-5.6%*	7,593.3 m €	*-7.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-86.4 m €
2nd	Accommodation and food services	-59.5 m €
3rd	Motor vehicles, trailers and semi-trailers	-53.6 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,625 Pers	*-15.7%*	75,532 Pers	*-9.6%*	98,045 Pers	*-10.2%*
Total Effects	15,560 Pers	*-25.4%*	94,737 Pers	*-12.2%*	178,931 Pers	*-9.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-5,300 Pers
2nd	Accommodation and food services	-2,388 Pers
3rd	Motor vehicles, trailers and semi-trailers	-1,222 Pers

DE - Germany

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	14,021.6 m €	81,753.0 m €	130,084.7 m €
Total Effects	16,407.4 m €	98,036.1 m €	232,500.1 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	90,017 Pers	1,162,725 Pers	1,965,615 Pers
Total Effects	116,162 Pers	1,500,427 Pers	3,089,205 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	10,988.8 m €	*-21.6%*	72,474.6 m €	*-11.3%*	112,111.5 m €	*-13.8%*
Total Effects	12,157.7 m €	*-25.9%*	85,486.6 m €	*-12.8%*	205,305.8 m €	*-11.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-5,886.2 m €
2nd	Sporting services, Core definition	-4,249.7 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,684.5 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	67,946 Pers	*-24.5%*	1,058,529 Pers	*-9.0%*	1,669,735 Pers	*-15.1%*
Total Effects	85,423 Pers	*-26.5%*	1,361,187 Pers	*-9.3%*	2,699,853 Pers	*-12.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-138,341 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-34,680 Pers
3rd	Sporting services, Core definition	-30,739 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	10,740.6 m €	*-23.4%*	71,670.7 m €	*-12.3%*	110,448.8 m €	*-15.1%*
Total Effects	11,804.3 m €	*-28.1%*	84,408.1 m €	*-13.9%*	202,792.5 m €	*-12.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-6,370.9 m €
2nd	Sporting services, Core definition	-4,603.1 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,978.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	66,110 Pers	*-26.6%*	1,049,387 Pers	*-9.7%*	1,642,016 Pers	*-16.5%*
Total Effects	82,862 Pers	*-28.7%*	1,349,112 Pers	*-10.1%*	2,663,604 Pers	*-13.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-149,734 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-40,496 Pers
3rd	Sporting services, Core definition	-33,300 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	10,184.0 m €	*-27.4%*	69,918.0 m €	*-14.5%*	107,440.3 m €	*-17.4%*
Total Effects	11,012.4 m €	*-32.9%*	82,053.5 m €	*-16.3%*	198,346.4 m €	*-14.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-7,068.1 m €
2nd	Sporting services, Core definition	-5,395.0 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-2,383.3 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	62,019 Pers	*-31.1%*	1,029,594 Pers	*-11.4%*	1,595,368 Pers	*-18.8%*
Total Effects	77,122 Pers	*-33.6%*	1,322,896 Pers	*-11.8%*	2,602,421 Pers	*-15.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-166,119 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-48,573 Pers
3rd	Sporting services, Core definition	-39,040 Pers

DK - Denmark

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	604.8 m €	3,140.1 m €	5,026.0 m €
Total Effects	996.1 m €	5,171.6 m €	8,307.6 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	18,486 Pers	46,855 Pers	68,332 Pers
Total Effects	23,855 Pers	60,464 Pers	96,221 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	473.3 m €	*-21.8%*	2,741.8 m €	*-12.7%*	4,439.5 m €	*-11.7%*
Total Effects	739.0 m €	*-25.8%*	4,545.6 m €	*-12.1%*	7,348.9 m €	*-11.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-257.1 m €
2nd	Accommodation and food services	-62.6 m €
3rd	Education services	-45.1 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,980 Pers	*-24.4%*	38,870 Pers	*-17.0%*	57,778 Pers	*-15.4%*
Total Effects	17,803 Pers	*-25.4%*	50,661 Pers	*-16.2%*	82,721 Pers	*-14.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-6,052 Pers
2nd	Accommodation and food services	-1,335 Pers
3rd	Sporting services and amusement and recreation services	-837 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	462.8 m €	*-23.5%*	2,702.4 m €	*-13.9%*	4,382.0 m €	*-12.8%*
Total Effects	718.2 m €	*-27.9%*	4,487.0 m €	*-13.2%*	7,258.4 m €	*-12.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-277.9 m €
2nd	Accommodation and food services	-67.8 m €
3rd	Human health services	-53.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,620 Pers	*-26.3%*	38,139 Pers	*-18.6%*	56,772 Pers	*-16.9%*
Total Effects	17,315 Pers	*-27.4%*	49,776 Pers	*-17.7%*	81,456 Pers	*-15.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-6,540 Pers
2nd	Accommodation and food services	-1,445 Pers
3rd	Sporting services and amusement and recreation services	-904 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	439.4 m €	*-27.4%*	2,617.9 m €	*-16.6%*	4,268.5 m €	*-15.1%*
Total Effects	671.8 m €	*-32.6%*	4,360.1 m €	*-15.7%*	7,081.5 m €	*-14.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-324.3 m €
2nd	Accommodation and food services	-75.6 m €
3rd	Human health services	-74.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	12,812 Pers	*-30.7%*	36,545 Pers	*-22.0%*	54,762 Pers	*-19.9%*
Total Effects	16,221 Pers	*-32.0%*	47,844 Pers	*-20.9%*	78,947 Pers	*-18.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-7,634 Pers
2nd	Accommodation and food services	-1,610 Pers
3rd	Sporting services and amusement and recreation services	-1,055 Pers

EE - Estonia

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	14.2 m €	227.9 m €	350.7 m €
Total Effects	30.1 m €	482.0 m €	592.4 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	3,543 Pers	10,398 Pers	14,801 Pers
Total Effects	4,572 Pers	13,417 Pers	18,765 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13.5 m €	*-4.9%*	220.6 m €	*-3.2%*	341.3 m €	*-2.7%*
Total Effects	28.3 m €	*-5.8%*	410.8 m €	*-14.8%*	458.0 m €	*-22.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Public administration & defence; comp. social security	-9.0 m €
2nd	Real estate services excluding imputed rents	-7.9 m €
3rd	Imputed rents of owner-occupied dwellings	-7.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	3,349 Pers	*-5.5%*	9,962 Pers	*-4.2%*	14,286 Pers	*-3.5%*
Total Effects	4,331 Pers	*-5.3%*	11,600 Pers	*-13.5%*	15,548 Pers	*-17.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Education services	-278 Pers
2nd	Sporting services, Core definition	-241 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-197 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13.5 m €	*-5.1%*	220.3 m €	*-3.3%*	340.9 m €	*-2.8%*
Total Effects	28.2 m €	*-6.1%*	405.9 m €	*-15.8%*	446.9 m €	*-24.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Public administration & defence; comp. social security	-9.8 m €
2nd	Real estate services excluding imputed rents	-8.6 m €
3rd	Imputed rents of owner-occupied dwellings	-8.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	3,340 Pers	*-5.7%*	9,944 Pers	*-4.4%*	14,262 Pers	*-3.6%*
Total Effects	4,318 Pers	*-5.5%*	11,483 Pers	*-14.4%*	15,295 Pers	*-18.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Education services	-300 Pers
2nd	Sporting services, Core definition	-253 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-214 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13.4 m €	*-5.6%*	219.6 m €	*-3.6%*	339.9 m €	*-3.1%*
Total Effects	28.1 m €	*-6.7%*	395.2 m €	*-18.0%*	426.5 m €	*-28.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Public administration & defence; comp. social security	-11.2 m €
2nd	Real estate services excluding imputed rents	-9.8 m €
3rd	Imputed rents of owner-occupied dwellings	-9.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	3,318 Pers	*-6.3%*	9,903 Pers	*-4.8%*	14,206 Pers	*-4.0%*
Total Effects	4,291 Pers	*-6.1%*	11,224 Pers	*-16.3%*	14,820 Pers	*-21.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Education services	-341 Pers
2nd	Sporting services, Core definition	-280 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-244 Pers

EL - Greece

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	78.2 m €	859.2 m €	1,754.0 m €
Total Effects	157.9 m €	1,735.8 m €	2,573.2 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	7,695 Pers	30,888 Pers	59,658 Pers
Total Effects	9,930 Pers	39,859 Pers	77,661 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	64.8 m €	*-17.1%*	790.1 m €	*-8.0%*	1,575.0 m €	*-10.2%*
Total Effects	125.9 m €	*-20.3%*	1,614.3 m €	*-7.0%*	2,274.8 m €	*-11.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-70.3 m €
2nd	Sporting services, Core definition	-32.0 m €
3rd	Education services	-23.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	6,222 Pers	*-19.1%*	27,465 Pers	*-11.1%*	52,554 Pers	*-11.9%*
Total Effects	7,557 Pers	*-23.9%*	35,402 Pers	*-11.2%*	68,069 Pers	*-12.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-2,373 Pers
2nd	Accommodation and food services	-2,190 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,117 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	63.8 m €	*-18.4%*	784.9 m €	*-8.6%*	1,559.3 m €	*-11.1%*
Total Effects	123.4 m €	*-21.8%*	1,605.2 m €	*-7.5%*	2,248.9 m €	*-12.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-76.4 m €
2nd	Sporting services, Core definition	-34.5 m €
3rd	Education services	-25.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	6,109 Pers	*-20.6%*	27,194 Pers	*-12.0%*	51,885 Pers	*-13.0%*
Total Effects	7,372 Pers	*-25.8%*	35,053 Pers	*-12.1%*	67,190 Pers	*-13.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-2,558 Pers
2nd	Accommodation and food services	-2,380 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,296 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	61.5 m €	*-21.3%*	773.5 m €	*-10.0%*	1,531.9 m €	*-12.7%*
Total Effects	117.8 m €	*-25.4%*	1,585.3 m €	*-8.7%*	2,203.4 m €	*-14.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-85.4 m €
2nd	Sporting services, Core definition	-40.1 m €
3rd	Education services	-29.3 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	5,853 Pers	*-23.9%*	26,594 Pers	*-13.9%*	50,693 Pers	*-15.0%*
Total Effects	6,957 Pers	*-29.9%*	34,281 Pers	*-14.0%*	65,627 Pers	*-15.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-2,973 Pers
2nd	Accommodation and food services	-2,657 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,544 Pers

ES - Spain

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	1,067.0 m €	9,476.8 m €	18,131.6 m €
Total Effects	1,916.9 m €	17,025.2 m €	28,657.3 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	25,744 Pers	163,083 Pers	310,706 Pers
Total Effects	33,221 Pers	210,449 Pers	452,986 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	830.3 m €	*-22.2%*	7,918.9 m €	*-16.4%*	15,165.8 m €	*-16.4%*
Total Effects	1,412.2 m €	*-26.3%*	14,798.9 m €	*-13.1%*	24,188.3 m €	*-15.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Creative, arts, [...] cultural svcs.; gambling and betting	-785.7 m €
2nd	Land transport services and pipelines	-685.7 m €
3rd	Accommodation and food services	-599.1 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	19,343 Pers	*-24.9%*	136,242 Pers	*-16.5%*	259,397 Pers	*-16.5%*
Total Effects	22,805 Pers	*-31.4%*	174,525 Pers	*-17.1%*	381,848 Pers	*-15.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Land transport services and pipelines	-13,128 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-13,072 Pers
3rd	Sporting services, Core definition	-10,416 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	810.8 m €	*-24.0%*	7,849.4 m €	*-17.2%*	14,977.5 m €	*-17.4%*
Total Effects	1,370.1 m €	*-28.5%*	14,697.5 m €	*-13.7%*	23,895.7 m €	*-16.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Creative, arts, [...] cultural svcs.; gambling and betting	-786.1 m €
2nd	Land transport services and pipelines	-745.8 m €
3rd	Accommodation and food services	-647.0 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	18,814 Pers	*-26.9%*	135,013 Pers	*-17.2%*	256,092 Pers	*-17.6%*
Total Effects	21,936 Pers	*-34.0%*	172,844 Pers	*-17.9%*	377,162 Pers	*-16.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Land transport services and pipelines	-14,278 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-13,077 Pers
3rd	Sporting services, Core definition	-11,285 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	767.2 m €	*-28.1%*	7,695.4 m €	*-18.8%*	14,640.7 m €	*-19.3%*
Total Effects	1,275.7 m €	*-33.5%*	14,472.2 m €	*-15.0%*	23,377.0 m €	*-18.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Land transport services and pipelines	-832.7 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-786.9 m €
3rd	Accommodation and food services	-716.0 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	17,626 Pers	*-31.5%*	132,288 Pers	*-18.9%*	250,208 Pers	*-19.5%*
Total Effects	19,988 Pers	*-39.8%*	169,114 Pers	*-19.6%*	368,852 Pers	*-18.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Land transport services and pipelines	-15,941 Pers
2nd	Sporting services, Core definition	-13,233 Pers
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-13,088 Pers

FI - Finland

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	732.7 m €	2,539.8 m €	3,949.8 m €
Total Effects	1,390.6 m €	4,820.3 m €	6,811.8 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	17,571 Pers	41,644 Pers	57,945 Pers
Total Effects	22,674 Pers	53,739 Pers	88,597 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	627.8 m €	*-14.3%*	2,258.9 m €	*-11.1%*	3,575.2 m €	*-9.5%*
Total Effects	1,154.3 m €	*-17.0%*	4,329.6 m €	*-10.2%*	6,150.4 m €	*-9.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-236.2 m €
2nd	Accommodation and food services	-35.9 m €
3rd	Land transport services and pipelines	-26.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	14,752 Pers	*-16.0%*	36,410 Pers	*-12.6%*	51,257 Pers	*-11.5%*
Total Effects	18,034 Pers	*-20.5%*	46,417 Pers	*-13.6%*	79,045 Pers	*-10.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-4,639 Pers
2nd	Accommodation and food services	-804 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-364 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	619.8 m €	*-15.4%*	2,235.8 m €	*-12.0%*	3,541.0 m €	*-10.4%*
Total Effects	1,136.1 m €	*-18.3%*	4,290.2 m €	*-11.0%*	6,091.7 m €	*-10.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-254.5 m €
2nd	Accommodation and food services	-40.1 m €
3rd	Land transport services and pipelines	-29.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	14,536 Pers	*-17.3%*	35,985 Pers	*-13.6%*	50,652 Pers	*-12.6%*
Total Effects	17,676 Pers	*-22.0%*	45,830 Pers	*-14.7%*	78,195 Pers	*-11.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-4,998 Pers
2nd	Accommodation and food services	-897 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-423 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	601.9 m €	*-17.8%*	2,184.6 m €	*-14.0%*	3,472.3 m €	*-12.1%*
Total Effects	1,095.2 m €	*-21.2%*	4,202.9 m €	*-12.8%*	5,974.2 m €	*-12.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-295.4 m €
2nd	Accommodation and food services	-46.5 m €
3rd	Land transport services and pipelines	-33.9 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	14,053 Pers	*-20.0%*	35,045 Pers	*-15.8%*	49,436 Pers	*-14.7%*
Total Effects	16,873 Pers	*-25.6%*	44,530 Pers	*-17.1%*	76,491 Pers	*-13.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-5,800 Pers
2nd	Accommodation and food services	-1,040 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-507 Pers

FR - France

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	5,510.3 m €	34,062.2 m €	48,370.7 m €
Total Effects	9,450.4 m €	58,417.8 m €	70,715.4 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	64,757 Pers	460,371 Pers	649,429 Pers
Total Effects	83,566 Pers	594,082 Pers	878,843 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	4,404.9 m €	*-20.1%*	30,439.9 m €	*-10.6%*	43,770.6 m €	*-9.5%*
Total Effects	7,206.0 m €	*-23.7%*	53,023.1 m €	*-9.2%*	63,697.9 m €	*-9.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-2,244.4 m €
2nd	Public administration & defence; comp. social security	-617.2 m €
3rd	Education services	-464.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	50,186 Pers	*-22.5%*	414,486 Pers	*-10.0%*	589,220 Pers	*-9.3%*
Total Effects	56,506 Pers	*-32.4%*	531,295 Pers	*-10.6%*	795,289 Pers	*-9.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-27,060 Pers
2nd	Public administration & defence; comp. social security	-8,771 Pers
3rd	Education services	-7,144 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	4,334.1 m €	*-21.3%*	30,201.2 m €	*-11.3%*	43,440.8 m €	*-10.2%*
Total Effects	7,059.8 m €	*-25.3%*	52,664.9 m €	*-9.8%*	63,184.3 m €	*-10.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-2,390.6 m €
2nd	Public administration & defence; comp. social security	-657.6 m €
3rd	Education services	-495.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	49,241 Pers	*-24.0%*	411,464 Pers	*-10.6%*	584,812 Pers	*-9.9%*
Total Effects	54,743 Pers	*-34.5%*	527,131 Pers	*-11.3%*	789,103 Pers	*-10.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-28,823 Pers
2nd	Public administration & defence; comp. social security	-9,345 Pers
3rd	Education services	-7,617 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	4,175.2 m €	*-24.2%*	29,668.4 m €	*-12.9%*	42,760.1 m €	*-11.6%*
Total Effects	6,732.1 m €	*-28.8%*	51,865.0 m €	*-11.2%*	62,144.1 m €	*-12.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-2,718.3 m €
2nd	Public administration & defence; comp. social security	-748.2 m €
3rd	Education services	-563.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	47,132 Pers	*-27.2%*	404,720 Pers	*-12.1%*	575,868 Pers	*-11.3%*
Total Effects	50,791 Pers	*-39.2%*	517,837 Pers	*-12.8%*	776,693 Pers	*-11.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-32,774 Pers
2nd	Public administration & defence; comp. social security	-10,631 Pers
3rd	Education services	-8,666 Pers

HR - Croatia

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	94.1 m €	438.3 m €	1,378.8 m €
Total Effects	170.8 m €	795.2 m €	2,287.5 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	3,282 Pers	16,633 Pers	50,874 Pers
Total Effects	4,235 Pers	21,464 Pers	73,648 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	79.2 m €	*-15.9%*	411.6 m €	*-6.1%*	1,189.3 m €	*-13.7%*
Total Effects	138.6 m €	*-18.8%*	735.0 m €	*-7.6%*	2,000.1 m €	*-12.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-147.2 m €
2nd	Sporting services, Core definition	-32.2 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-8.6 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	2,697 Pers	*-17.8%*	15,237 Pers	*-8.4%*	44,691 Pers	*-12.2%*
Total Effects	2,993 Pers	*-29.3%*	19,106 Pers	*-11.0%*	64,934 Pers	*-11.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-4,101 Pers
2nd	Sporting services, Core definition	-1,242 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-372 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	78.3 m €	*-16.8%*	410.0 m €	*-6.5%*	1,164.0 m €	*-15.6%*
Total Effects	136.7 m €	*-20.0%*	731.1 m €	*-8.1%*	1,965.6 m €	*-14.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-168.8 m €
2nd	Sporting services, Core definition	-34.1 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-9.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	2,663 Pers	*-18.9%*	15,153 Pers	*-8.9%*	43,910 Pers	*-13.7%*
Total Effects	2,919 Pers	*-31.1%*	18,955 Pers	*-11.7%*	63,903 Pers	*-13.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-4,701 Pers
2nd	Sporting services, Core definition	-1,316 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-416 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	76.3 m €	*-18.9%*	406.4 m €	*-7.3%*	1,124.9 m €	*-18.4%*
Total Effects	132.4 m €	*-22.5%*	722.4 m €	*-9.2%*	1,910.1 m €	*-16.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-201.2 m €
2nd	Sporting services, Core definition	-38.4 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-11.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	2,585 Pers	*-21.2%*	14,966 Pers	*-10.0%*	42,675 Pers	*-16.1%*
Total Effects	2,752 Pers	*-35.0%*	18,620 Pers	*-13.2%*	62,238 Pers	*-15.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-5,603 Pers
2nd	Sporting services, Core definition	-1,482 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-480 Pers

HU - Hungary

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	108.6 m €	1,093.0 m €	1,958.6 m €
Total Effects	245.6 m €	2,471.1 m €	3,290.2 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	8,449 Pers	50,022 Pers	90,728 Pers
Total Effects	10,903 Pers	64,550 Pers	118,608 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	91.1 m €	*-16.2%*	1,011.8 m €	*-7.4%*	1,793.4 m €	*-8.4%*
Total Effects	198.5 m €	*-19.2%*	2,293.7 m €	*-7.2%*	2,928.8 m €	*-11.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-56.8 m €
2nd	Sporting services, Core definition	-47.1 m €
3rd	Education services	-23.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	6,919 Pers	*-18.1%*	45,797 Pers	*-8.4%*	81,534 Pers	*-10.1%*
Total Effects	8,235 Pers	*-24.5%*	57,595 Pers	*-10.8%*	103,792 Pers	*-12.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-3,867 Pers
2nd	Sporting services, Core definition	-2,669 Pers
3rd	Education services	-1,187 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	89.7 m €	*-17.4%*	1,005.6 m €	*-8.0%*	1,779.5 m €	*-9.1%*
Total Effects	194.9 m €	*-20.7%*	2,280.1 m €	*-7.7%*	2,897.8 m €	*-11.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-61.8 m €
2nd	Sporting services, Core definition	-50.7 m €
3rd	Education services	-25.6 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	6,802 Pers	*-19.5%*	45,473 Pers	*-9.1%*	80,736 Pers	*-11.0%*
Total Effects	8,029 Pers	*-26.4%*	57,061 Pers	*-11.6%*	102,507 Pers	*-13.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-4,207 Pers
2nd	Sporting services, Core definition	-2,875 Pers
3rd	Education services	-1,279 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	86.8 m €	*-20.1%*	991.7 m €	*-9.3%*	1,753.2 m €	*-10.5%*
Total Effects	186.7 m €	*-24.0%*	2,249.9 m €	*-9.0%*	2,840.9 m €	*-13.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-69.1 m €
2nd	Sporting services, Core definition	-58.9 m €
3rd	Education services	-29.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	6,539 Pers	*-22.6%*	44,746 Pers	*-10.5%*	79,286 Pers	*-12.6%*
Total Effects	7,567 Pers	*-30.6%*	55,871 Pers	*-13.4%*	100,179 Pers	*-15.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-4,704 Pers
2nd	Sporting services, Core definition	-3,337 Pers
3rd	Education services	-1,484 Pers

IE - Ireland

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	1,183.5 m €	2,672.6 m €	4,238.2 m €
Total Effects	1,270.2 m €	2,868.2 m €	6,411.5 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	17,012 Pers	27,004 Pers	41,481 Pers
Total Effects	21,953 Pers	34,847 Pers	56,900 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	989.4 m €	*-16.4%*	2,346.1 m €	*-12.2%*	3,777.9 m €	*-10.9%*
Total Effects	1,022.9 m €	*-19.5%*	2,360.9 m €	*-17.7%*	5,532.8 m €	*-13.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-247.3 m €
2nd	Accommodation and food services	-77.3 m €
3rd	Food, beverages and tobacco products	-66.6 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,884 Pers	*-18.4%*	22,891 Pers	*-15.2%*	34,988 Pers	*-15.7%*
Total Effects	18,495 Pers	*-15.7%*	29,781 Pers	*-14.5%*	48,143 Pers	*-15.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-3,457 Pers
2nd	Accommodation and food services	-1,745 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-608 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	973.5 m €	*-17.7%*	2,319.8 m €	*-13.2%*	3,736.6 m €	*-11.8%*
Total Effects	1,002.4 m €	*-21.1%*	2,320.5 m €	*-19.1%*	5,454.6 m €	*-14.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-267.8 m €
2nd	Accommodation and food services	-83.7 m €
3rd	Food, beverages and tobacco products	-72.3 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,628 Pers	*-19.9%*	22,556 Pers	*-16.5%*	34,394 Pers	*-17.1%*
Total Effects	18,210 Pers	*-17.1%*	29,373 Pers	*-15.7%*	47,351 Pers	*-16.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-3,743 Pers
2nd	Accommodation and food services	-1,890 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-719 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	938.1 m €	*-20.7%*	2,262.0 m €	*-15.4%*	3,656.4 m €	*-13.7%*
Total Effects	956.6 m €	*-24.7%*	2,231.6 m €	*-22.2%*	5,309.6 m €	*-17.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-313.6 m €
2nd	Accommodation and food services	-93.1 m €
3rd	Food, beverages and tobacco products	-81.6 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	13,053 Pers	*-23.3%*	21,810 Pers	*-19.2%*	33,277 Pers	*-19.8%*
Total Effects	17,569 Pers	*-20.0%*	28,466 Pers	*-18.3%*	45,887 Pers	*-19.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-4,383 Pers
2nd	Accommodation and food services	-2,102 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-872 Pers

IT - Italy

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	1,869.6 m €	13,377.2 m €	25,508.0 m €
Total Effects	4,561.1 m €	32,634.8 m €	48,737.8 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	51,423 Pers	236,668 Pers	428,446 Pers
Total Effects	66,359 Pers	305,407 Pers	707,375 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,620.3 m €	*-13.3%*	11,774.7 m €	*-12.0%*	22,074.3 m €	*-13.5%*
Total Effects	3,839.4 m €	*-15.8%*	29,253.0 m €	*-10.4%*	42,111.6 m €	*-13.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-1,013.9 m €
2nd	Land transport services and pipelines	-752.8 m €
3rd	Sporting services, Core definition	-721.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	43,740 Pers	*-14.9%*	209,314 Pers	*-11.6%*	371,594 Pers	*-13.3%*
Total Effects	51,641 Pers	*-22.2%*	257,249 Pers	*-15.8%*	614,948 Pers	*-13.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-19,773 Pers
2nd	Sporting services, Core definition	-14,718 Pers
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-8,290 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,602.6 m €	*-14.3%*	11,694.5 m €	*-12.6%*	21,832.4 m €	*-14.4%*
Total Effects	3,787.0 m €	*-17.0%*	29,076.5 m €	*-10.9%*	41,646.6 m €	*-14.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-1,096.5 m €
2nd	Land transport services and pipelines	-821.1 m €
3rd	Sporting services, Core definition	-774.1 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	43,188 Pers	*-16.0%*	207,749 Pers	*-12.2%*	367,427 Pers	*-14.2%*
Total Effects	50,574 Pers	*-23.8%*	254,572 Pers	*-16.6%*	608,357 Pers	*-14.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-21,382 Pers
2nd	Sporting services, Core definition	-15,785 Pers
3rd	Land transport services and pipelines	-8,382 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,562.7 m €	*-16.4%*	11,515.6 m €	*-13.9%*	21,412.0 m €	*-16.1%*
Total Effects	3,669.7 m €	*-19.5%*	28,682.8 m €	*-12.1%*	40,822.5 m €	*-16.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-1,217.1 m €
2nd	Land transport services and pipelines	-922.2 m €
3rd	Sporting services, Core definition	-891.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	41,950 Pers	*-18.4%*	204,254 Pers	*-13.7%*	360,055 Pers	*-16.0%*
Total Effects	48,181 Pers	*-27.4%*	248,592 Pers	*-18.6%*	596,557 Pers	*-15.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-23,735 Pers
2nd	Sporting services, Core definition	-18,178 Pers
3rd	Land transport services and pipelines	-9,414 Pers

LT - Lithuania

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	22.7 m €	325.9 m €	506.6 m €
Total Effects	46.9 m €	672.2 m €	787.4 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	7,989 Pers	18,648 Pers	25,032 Pers
Total Effects	10,309 Pers	24,064 Pers	32,702 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	21.0 m €	*-7.8%*	302.8 m €	*-7.1%*	476.1 m €	*-6.0%*
Total Effects	42.6 m €	*-9.2%*	578.9 m €	*-13.9%*	620.2 m €	*-21.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Wholesale trade services, excl. motor vehicles	-13.5 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-12.1 m €
3rd	Land transport services and pipelines	-10.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	7,294 Pers	*-8.7%*	17,084 Pers	*-8.4%*	23,204 Pers	*-7.3%*
Total Effects	9,346 Pers	*-9.3%*	20,639 Pers	*-14.2%*	27,334 Pers	*-16.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-963 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-542 Pers
3rd	Constructions and construction works	-259 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	20.9 m €	*-8.1%*	302.1 m €	*-7.3%*	474.7 m €	*-6.3%*
Total Effects	42.4 m €	*-9.6%*	573.4 m €	*-14.7%*	607.6 m €	*-22.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Wholesale trade services, excl. motor vehicles	-14.6 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-12.2 m €
3rd	Land transport services and pipelines	-11.7 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	7,262 Pers	*-9.1%*	17,027 Pers	*-8.7%*	23,123 Pers	*-7.6%*
Total Effects	9,301 Pers	*-9.8%*	20,459 Pers	*-15.0%*	26,968 Pers	*-17.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-1,008 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-549 Pers
3rd	Accommodation and food services	-280 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	20.7 m €	*-8.9%*	300.5 m €	*-7.8%*	471.7 m €	*-6.9%*
Total Effects	41.9 m €	*-10.6%*	561.4 m €	*-16.5%*	584.4 m €	*-25.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Wholesale trade services, excl. motor vehicles	-16.7 m €
2nd	Land transport services and pipelines	-13.6 m €
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-12.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	7,190 Pers	*-10.0%*	16,900 Pers	*-9.4%*	22,947 Pers	*-8.3%*
Total Effects	9,199 Pers	*-10.8%*	20,061 Pers	*-16.6%*	26,274 Pers	*-19.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-1,110 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-562 Pers
3rd	Accommodation and food services	-331 Pers

LU - Luxembourg

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	141.6 m €	567.3 m €	1,159.7 m €
Total Effects	234.5 m €	939.6 m €	2,209.4 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	445 Pers	2,521 Pers	4,812 Pers
Total Effects	574 Pers	3,253 Pers	10,634 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	122.3 m €	*-13.6%*	517.7 m €	*-8.7%*	1,088.7 m €	*-6.1%*
Total Effects	196.6 m €	*-16.2%*	823.2 m €	*-12.4%*	1,989.9 m €	*-9.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-37.9 m €
2nd	Financial services, excl. insurance & pension funding	-37.6 m €
3rd	Services auxilliary to financial & insurance services	-17.6 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	377 Pers	*-15.3%*	2,322 Pers	*-7.9%*	4,461 Pers	*-7.3%*
Total Effects	438 Pers	*-23.7%*	2,833 Pers	*-12.9%*	9,805 Pers	*-7.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-136 Pers
2nd	Accommodation and food services	-128 Pers
3rd	Public administration & defence; comp. social security	-60 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	121.0 m €	*-14.6%*	514.2 m €	*-9.4%*	1,082.6 m €	*-6.7%*
Total Effects	193.9 m €	*-17.3%*	814.7 m €	*-13.3%*	1,970.8 m €	*-10.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Financial services, excl. insurance & pension funding	-40.9 m €
2nd	Sporting services, Core definition	-40.6 m €
3rd	Services auxilliary to financial & insurance services	-19.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	372 Pers	*-16.3%*	2,309 Pers	*-8.4%*	4,429 Pers	*-8.0%*
Total Effects	428 Pers	*-25.4%*	2,803 Pers	*-13.8%*	9,730 Pers	*-8.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-146 Pers
2nd	Accommodation and food services	-144 Pers
3rd	Public administration & defence; comp. social security	-65 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	118.0 m €	*-16.7%*	506.3 m €	*-10.7%*	1,070.7 m €	*-7.7%*
Total Effects	187.9 m €	*-19.9%*	795.8 m €	*-15.3%*	1,935.9 m €	*-12.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Financial services, excl. insurance & pension funding	-46.7 m €
2nd	Sporting services, Core definition	-46.6 m €
3rd	Accommodation and food services	-22.0 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	362 Pers	*-18.7%*	2,279 Pers	*-9.6%*	4,369 Pers	*-9.2%*
Total Effects	407 Pers	*-29.2%*	2,736 Pers	*-15.9%*	9,597 Pers	*-9.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-168 Pers
2nd	Sporting services, Core definition	-168 Pers
3rd	Public administration & defence; comp. social security	-75 Pers

LV - Latvia

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	25.3 m €	199.5 m €	289.7 m €
Total Effects	48.2 m €	379.2 m €	463.1 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	1,723 Pers	11,786 Pers	17,975 Pers
Total Effects	2,223 Pers	15,208 Pers	23,441 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	22.1 m €	*-12.9%*	182.8 m €	*-8.4%*	269.6 m €	*-6.9%*
Total Effects	40.8 m €	*-15.3%*	288.7 m €	*-23.9%*	297.8 m €	*-35.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Imputed rents of owner-occupied dwellings	-16.0 m €
2nd	Public administration & defence; comp. social security	-11.1 m €
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-10.0 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,474 Pers	*-14.4%*	10,921 Pers	*-7.3%*	16,911 Pers	*-5.9%*
Total Effects	1,833 Pers	*-17.5%*	11,318 Pers	*-25.6%*	16,352 Pers	*-30.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Education services	-669 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-417 Pers
3rd	Human health services	-391 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	21.8 m €	*-13.9%*	182.0 m €	*-8.8%*	268.4 m €	*-7.4%*
Total Effects	40.2 m €	*-16.5%*	282.6 m €	*-25.5%*	284.3 m €	*-38.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Imputed rents of owner-occupied dwellings	-17.3 m €
2nd	Public administration & defence; comp. social security	-12.0 m €
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-10.3 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,455 Pers	*-15.6%*	10,872 Pers	*-7.8%*	16,840 Pers	*-6.3%*
Total Effects	1,803 Pers	*-18.9%*	11,051 Pers	*-27.3%*	15,771 Pers	*-32.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Education services	-725 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-458 Pers
3rd	Human health services	-424 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	21.3 m €	*-16.1%*	180.2 m €	*-9.7%*	266.0 m €	*-8.2%*
Total Effects	39.0 m €	*-19.1%*	269.1 m €	*-29.0%*	259.5 m €	*-44.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Imputed rents of owner-occupied dwellings	-19.8 m €
2nd	Public administration & defence; comp. social security	-13.7 m €
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-10.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,412 Pers	*-18.0%*	10,763 Pers	*-8.7%*	16,693 Pers	*-7.1%*
Total Effects	1,736 Pers	*-21.9%*	10,463 Pers	*-31.2%*	14,697 Pers	*-37.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Education services	-831 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-527 Pers
3rd	Sporting services, Core definition	-487 Pers

MT - Malta

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	17.1 m €	166.5 m €	292.3 m €
Total Effects	30.1 m €	292.8 m €	523.0 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	976 Pers	3,402 Pers	5,738 Pers
Total Effects	1,260 Pers	4,390 Pers	8,609 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	15.1 m €	*-12.1%*	153.9 m €	*-7.6%*	272.6 m €	*-6.7%*
Total Effects	25.8 m €	*-14.4%*	240.6 m €	*-17.8%*	433.4 m €	*-17.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Creative, arts, [...] cultural svcs.; gambling and betting	-19.6 m €
2nd	Accommodation and food services	-7.7 m €
3rd	Education services	-4.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	844 Pers	*-13.6%*	3,106 Pers	*-8.7%*	5,276 Pers	*-8.1%*
Total Effects	1,064 Pers	*-15.6%*	3,534 Pers	*-19.5%*	7,114 Pers	*-17.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-196 Pers
2nd	Accommodation and food services	-183 Pers
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-158 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	14.9 m €	*-12.8%*	153.5 m €	*-7.8%*	271.3 m €	*-7.2%*
Total Effects	25.5 m €	*-15.2%*	237.8 m €	*-18.8%*	426.8 m €	*-18.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Creative, arts, [...] cultural svcs.; gambling and betting	-20.3 m €
2nd	Accommodation and food services	-8.5 m €
3rd	Education services	-5.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	836 Pers	*-14.4%*	3,091 Pers	*-9.1%*	5,239 Pers	*-8.7%*
Total Effects	1,051 Pers	*-16.5%*	3,484 Pers	*-20.6%*	6,996 Pers	*-18.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-208 Pers
2nd	Accommodation and food services	-204 Pers
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-164 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	14.7 m €	*-14.5%*	152.5 m €	*-8.4%*	269.0 m €	*-8.0%*
Total Effects	24.9 m €	*-17.2%*	231.8 m €	*-20.9%*	414.8 m €	*-20.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Creative, arts, [...] cultural svcs.; gambling and betting	-21.6 m €
2nd	Accommodation and food services	-9.9 m €
3rd	Education services	-5.9 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	818 Pers	*-16.2%*	3,056 Pers	*-10.2%*	5,172 Pers	*-9.9%*
Total Effects	1,024 Pers	*-18.7%*	3,373 Pers	*-23.2%*	6,780 Pers	*-21.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-237 Pers
2nd	Sporting services, Core definition	-235 Pers
3rd	Creative, arts, [...] cultural svcs.; gambling and betting	-174 Pers

NL - Netherlands

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	882.9 m €	6,083.9 m €	10,287.0 m €
Total Effects	1,757.5 m €	12,111.2 m €	17,396.9 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	39,825 Pers	95,358 Pers	159,808 Pers
Total Effects	51,392 Pers	123,053 Pers	224,789 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	741.4 m €	*-16.0%*	5,597.8 m €	*-8.0%*	9,292.9 m €	*-9.7%*
Total Effects	1,423.2 m €	*-19.0%*	11,055.5 m €	*-8.7%*	15,236.7 m €	*-12.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-406.5 m €
2nd	Sporting services, Core definition	-334.3 m €
3rd	Wholesale trade services, excl. motor vehicles	-136.6 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	32,673 Pers	*-18.0%*	83,427 Pers	*-12.5%*	137,289 Pers	*-14.1%*
Total Effects	41,245 Pers	*-19.7%*	106,901 Pers	*-13.1%*	193,731 Pers	*-13.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-10,147 Pers
2nd	Accommodation and food services	-9,225 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,178 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	731.4 m €	*-17.2%*	5,559.9 m €	*-8.6%*	9,203.6 m €	*-10.5%*
Total Effects	1,399.3 m €	*-20.4%*	10,975.2 m €	*-9.4%*	15,048.0 m €	*-13.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-446.3 m €
2nd	Sporting services, Core definition	-358.2 m €
3rd	Wholesale trade services, excl. motor vehicles	-148.3 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	32,166 Pers	*-19.2%*	82,531 Pers	*-13.5%*	135,297 Pers	*-15.3%*
Total Effects	40,519 Pers	*-21.2%*	105,691 Pers	*-14.1%*	191,011 Pers	*-15.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-10,873 Pers
2nd	Accommodation and food services	-10,129 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,358 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	709.1 m €	*-19.7%*	5,477.1 m €	*-10.0%*	9,043.1 m €	*-12.1%*
Total Effects	1,345.7 m €	*-23.4%*	10,798.3 m €	*-10.8%*	14,708.3 m €	*-15.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-505.4 m €
2nd	Sporting services, Core definition	-411.8 m €
3rd	Wholesale trade services, excl. motor vehicles	-169.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	31,029 Pers	*-22.1%*	80,552 Pers	*-15.5%*	131,697 Pers	*-17.6%*
Total Effects	38,892 Pers	*-24.3%*	103,014 Pers	*-16.3%*	186,097 Pers	*-17.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-12,500 Pers
2nd	Accommodation and food services	-11,471 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,607 Pers

PL - Poland

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	556.8 m €	8,823.3 m €	12,685.5 m €
Total Effects	1,267.5 m €	20,084.0 m €	23,272.0 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	34,712 Pers	274,813 Pers	368,377 Pers
Total Effects	44,794 Pers	354,629 Pers	617,572 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	442.1 m €	*-20.6%*	7,570.7 m €	*-14.2%*	11,270.1 m €	*-11.2%*
Total Effects	957.4 m €	*-24.5%*	17,682.7 m €	*-12.0%*	20,498.2 m €	*-11.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Constructions and construction works	-413.3 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-401.7 m €
3rd	Sporting services, Core definition	-310.1 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	26,694 Pers	*-23.1%*	230,929 Pers	*-16.0%*	320,221 Pers	*-13.1%*
Total Effects	29,092 Pers	*-35.1%*	280,301 Pers	*-21.0%*	532,948 Pers	*-13.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Creative, arts, [...] cultural svcs.; gambling and betting	-15,841 Pers
2nd	Sporting services, Core definition	-15,702 Pers
3rd	Constructions and construction works	-9,252 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	434.4 m €	*-22.0%*	7,510.3 m €	*-14.9%*	11,196.4 m €	*-11.7%*
Total Effects	936.5 m €	*-26.1%*	17,556.3 m €	*-12.6%*	20,338.7 m €	*-12.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Constructions and construction works	-440.7 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-401.7 m €
3rd	Sporting services, Core definition	-331.0 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	26,157 Pers	*-24.6%*	228,955 Pers	*-16.7%*	317,856 Pers	*-13.7%*
Total Effects	28,032 Pers	*-37.4%*	276,544 Pers	*-22.0%*	528,236 Pers	*-14.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-16,761 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-15,842 Pers
3rd	Constructions and construction works	-9,861 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	417.4 m €	*-25.0%*	7,376.3 m €	*-16.4%*	11,037.4 m €	*-13.0%*
Total Effects	889.6 m €	*-29.8%*	17,275.1 m €	*-14.0%*	20,002.5 m €	*-14.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Constructions and construction works	-501.4 m €
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-401.7 m €
3rd	Sporting services, Core definition	-377.9 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	24,955 Pers	*-28.1%*	224,566 Pers	*-18.3%*	312,805 Pers	*-15.1%*
Total Effects	25,657 Pers	*-42.7%*	268,171 Pers	*-24.4%*	518,352 Pers	*-16.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-19,137 Pers
2nd	Creative, arts, [...] cultural svcs.; gambling and betting	-15,845 Pers
3rd	Constructions and construction works	-11,212 Pers

PT - Portgual

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	329.3 m €	1,291.0 m €	2,483.9 m €
Total Effects	748.5 m €	2,934.6 m €	4,789.0 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	10,712 Pers	39,836 Pers	75,081 Pers
Total Effects	13,823 Pers	51,406 Pers	115,521 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	263.7 m €	*-19.9%*	1,071.6 m €	*-17.0%*	2,196.5 m €	*-11.6%*
Total Effects	571.6 m €	*-23.6%*	2,536.4 m €	*-13.6%*	4,259.0 m €	*-11.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-176.9 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-47.7 m €
3rd	Security and investigation; services to buildings	-25.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	8,322 Pers	*-22.3%*	33,036 Pers	*-17.1%*	65,667 Pers	*-12.5%*
Total Effects	8,690 Pers	*-37.1%*	40,822 Pers	*-20.6%*	101,060 Pers	*-12.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-5,133 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-2,194 Pers
3rd	Other transport equipment	-754 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	258.5 m €	*-21.5%*	1,053.9 m €	*-18.4%*	2,168.0 m €	*-12.7%*
Total Effects	557.2 m €	*-25.6%*	2,504.7 m €	*-14.6%*	4,208.4 m €	*-12.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-191.3 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-56.9 m €
3rd	Security and investigation; services to buildings	-28.1 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	8,129 Pers	*-24.1%*	32,488 Pers	*-18.4%*	64,664 Pers	*-13.9%*
Total Effects	8,272 Pers	*-40.2%*	39,979 Pers	*-22.2%*	99,613 Pers	*-13.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-5,550 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-2,617 Pers
3rd	Other transport equipment	-816 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	246.7 m €	*-25.1%*	1,014.3 m €	*-21.4%*	2,112.6 m €	*-14.9%*
Total Effects	525.0 m €	*-29.9%*	2,433.7 m €	*-17.1%*	4,110.0 m €	*-14.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-223.5 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-69.4 m €
3rd	Security and investigation; services to buildings	-32.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	7,696 Pers	*-28.1%*	31,259 Pers	*-21.5%*	62,798 Pers	*-16.4%*
Total Effects	7,337 Pers	*-46.9%*	38,092 Pers	*-25.9%*	96,871 Pers	*-16.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-6,486 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-3,194 Pers
3rd	Other transport equipment	-952 Pers

RO - Romania

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	146.5 m €	1,511.1 m €	2,561.6 m €
Total Effects	370.2 m €	3,817.6 m €	5,150.9 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	9,957 Pers	65,596 Pers	114,305 Pers
Total Effects	12,849 Pers	84,648 Pers	177,961 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	125.6 m €	*-14.3%*	1,407.0 m €	*-6.9%*	2,397.5 m €	*-6.4%*
Total Effects	307.4 m €	*-17.0%*	3,506.7 m €	*-8.1%*	4,634.7 m €	*-10.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-62.7 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-37.3 m €
3rd	Imputed rents of owner-occupied dwellings	-34.0 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	8,363 Pers	*-16.0%*	60,838 Pers	*-7.3%*	106,380 Pers	*-6.9%*
Total Effects	9,879 Pers	*-23.1%*	73,452 Pers	*-13.2%*	158,744 Pers	*-10.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Retail trade services, excl. motor vehicles & motorcycles	-3,033 Pers
2nd	Sporting services, Core definition	-2,969 Pers
3rd	Accommodation and food services	-1,358 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	124.1 m €	*-15.3%*	1,399.5 m €	*-7.4%*	2,383.3 m €	*-7.0%*
Total Effects	302.9 m €	*-18.2%*	3,484.5 m €	*-8.7%*	4,591.1 m €	*-10.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-67.2 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-41.9 m €
3rd	Imputed rents of owner-occupied dwellings	-36.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	8,250 Pers	*-17.1%*	60,484 Pers	*-7.8%*	105,633 Pers	*-7.6%*
Total Effects	9,667 Pers	*-24.8%*	72,636 Pers	*-14.2%*	157,047 Pers	*-11.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Retail trade services, excl. motor vehicles & motorcycles	-3,408 Pers
2nd	Sporting services, Core definition	-3,181 Pers
3rd	Accommodation and food services	-1,483 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	120.8 m €	*-17.5%*	1,382.8 m €	*-8.5%*	2,356.5 m €	*-8.0%*
Total Effects	292.9 m €	*-20.9%*	3,435.2 m €	*-10.0%*	4,509.4 m €	*-12.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-77.3 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-48.9 m €
3rd	Imputed rents of owner-occupied dwellings	-42.1 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	7,998 Pers	*-19.7%*	59,699 Pers	*-9.0%*	104,277 Pers	*-8.8%*
Total Effects	9,192 Pers	*-28.5%*	70,827 Pers	*-16.3%*	153,929 Pers	*-13.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Retail trade services, excl. motor vehicles & motorcycles	-3,975 Pers
2nd	Sporting services, Core definition	-3,656 Pers
3rd	Accommodation and food services	-1,678 Pers

SE - Sweden

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	1,071.0 m €	4,666.4 m €	7,935.1 m €
Total Effects	2,029.9 m €	8,844.3 m €	13,760.9 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	42,730 Pers	99,595 Pers	143,020 Pers
Total Effects	55,141 Pers	128,522 Pers	196,914 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	915.8 m €	*-14.5%*	4,220.6 m €	*-9.6%*	7,284.5 m €	*-8.2%*
Total Effects	1,680.9 m €	*-17.2%*	7,649.9 m €	*-13.5%*	11,803.0 m €	*-14.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-349.0 m €
2nd	Wholesale trade services, excl. motor vehicles	-327.2 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-197.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	35,793 Pers	*-16.2%*	88,000 Pers	*-11.6%*	128,122 Pers	*-10.4%*
Total Effects	44,889 Pers	*-18.6%*	110,428 Pers	*-14.1%*	170,672 Pers	*-13.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-10,252 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-2,936 Pers
3rd	Accommodation and food services	-2,828 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	903.0 m €	*-15.7%*	4,181.2 m €	*-10.4%*	7,221.4 m €	*-9.0%*
Total Effects	1,651.6 m €	*-18.6%*	7,553.0 m €	*-14.6%*	11,625.4 m €	*-15.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-378.3 m €
2nd	Wholesale trade services, excl. motor vehicles	-355.0 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-214.0 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	35,216 Pers	*-17.6%*	87,003 Pers	*-12.6%*	126,730 Pers	*-11.4%*
Total Effects	44,030 Pers	*-20.2%*	108,933 Pers	*-15.2%*	168,290 Pers	*-14.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-11,111 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-3,185 Pers
3rd	Accommodation and food services	-3,183 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	874.3 m €	*-18.4%*	4,093.9 m €	*-12.3%*	7,095.3 m €	*-10.6%*
Total Effects	1,586.1 m €	*-21.9%*	7,338.4 m €	*-17.0%*	11,283.6 m €	*-18.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-443.8 m €
2nd	Wholesale trade services, excl. motor vehicles	-405.6 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-244.5 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	33,924 Pers	*-20.6%*	84,781 Pers	*-14.9%*	123,880 Pers	*-13.4%*
Total Effects	42,104 Pers	*-23.6%*	105,610 Pers	*-17.8%*	163,574 Pers	*-16.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-13,037 Pers
2nd	Accommodation and food services	-3,722 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-3,639 Pers

SI - Slovenia

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	23.5 m €	408.3 m €	789.1 m €
Total Effects	61.7 m €	1,070.0 m €	1,294.8 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	1,510 Pers	11,847 Pers	24,308 Pers
Total Effects	1,948 Pers	15,288 Pers	32,983 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	22.3 m €	*-5.3%*	390.7 m €	*-4.3%*	739.9 m €	*-6.2%*
Total Effects	57.8 m €	*-6.2%*	1,023.9 m €	*-4.3%*	1,188.3 m €	*-8.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-14.3 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-9.7 m €
3rd	Education services	-7.9 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,421 Pers	*-5.9%*	11,276 Pers	*-4.8%*	22,652 Pers	*-6.8%*
Total Effects	1,781 Pers	*-8.6%*	14,142 Pers	*-7.5%*	30,203 Pers	*-8.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-524 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-397 Pers
3rd	Education services	-265 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	22.2 m €	*-5.7%*	388.7 m €	*-4.8%*	734.1 m €	*-7.0%*
Total Effects	57.5 m €	*-6.7%*	1,019.7 m €	*-4.7%*	1,177.3 m €	*-9.1%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-15.8 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-11.3 m €
3rd	Education services	-8.5 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,414 Pers	*-6.3%*	11,217 Pers	*-5.3%*	22,456 Pers	*-7.6%*
Total Effects	1,768 Pers	*-9.2%*	14,039 Pers	*-8.2%*	29,907 Pers	*-9.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-579 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-464 Pers
3rd	Education services	-286 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	22.0 m €	*-6.6%*	384.6 m €	*-5.8%*	724.3 m €	*-8.2%*
Total Effects	56.8 m €	*-7.8%*	1,010.8 m €	*-5.5%*	1,158.1 m €	*-10.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-18.0 m €
2nd	Retail trade services, excl. motor vehicles & motorcycles	-13.5 m €
3rd	Education services	-9.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,398 Pers	*-7.4%*	11,093 Pers	*-6.4%*	22,132 Pers	*-8.9%*
Total Effects	1,739 Pers	*-10.7%*	13,818 Pers	*-9.6%*	29,401 Pers	*-10.9%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-660 Pers
2nd	Retail trade services, excl. motor vehicles & motorcycles	-555 Pers
3rd	Education services	-331 Pers

SK - Slovakia

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	85.9 m €	733.9 m €	1,335.4 m €
Total Effects	206.3 m €	1,761.9 m €	2,429.6 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	5,657 Pers	28,012 Pers	53,178 Pers
Total Effects	7,300 Pers	36,147 Pers	73,321 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	74.5 m €	*-13.4%*	680.7 m €	*-7.3%*	1,198.6 m €	*-10.2%*
Total Effects	173.6 m €	*-15.9%*	1,631.6 m €	*-7.4%*	2,155.3 m €	*-11.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Land transport services and pipelines	-49.4 m €
2nd	Sporting services, Core definition	-32.7 m €
3rd	Accommodation and food services	-29.8 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	4,810 Pers	*-15.0%*	25,940 Pers	*-7.4%*	47,380 Pers	*-10.9%*
Total Effects	5,981 Pers	*-18.1%*	32,205 Pers	*-10.9%*	64,254 Pers	*-12.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-2,278 Pers
2nd	Sporting services, Core definition	-1,319 Pers
3rd	Land transport services and pipelines	-1,209 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	73.8 m €	*-14.2%*	677.6 m €	*-7.7%*	1,184.7 m €	*-11.3%*
Total Effects	171.6 m €	*-16.8%*	1,623.0 m €	*-7.9%*	2,129.4 m €	*-12.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Land transport services and pipelines	-55.7 m €
2nd	Sporting services, Core definition	-34.7 m €
3rd	Accommodation and food services	-33.5 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	4,758 Pers	*-15.9%*	25,814 Pers	*-7.8%*	46,774 Pers	*-12.0%*
Total Effects	5,899 Pers	*-19.2%*	31,944 Pers	*-11.6%*	63,362 Pers	*-13.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-2,565 Pers
2nd	Sporting services, Core definition	-1,400 Pers
3rd	Land transport services and pipelines	-1,365 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	72.2 m €	*-16.0%*	670.8 m €	*-8.6%*	1,161.7 m €	*-13.0%*
Total Effects	167.0 m €	*-19.0%*	1,604.0 m €	*-9.0%*	2,084.1 m €	*-14.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Land transport services and pipelines	-65.5 m €
2nd	Sporting services, Core definition	-39.3 m €
3rd	Accommodation and food services	-39.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	4,642 Pers	*-17.9%*	25,531 Pers	*-8.9%*	45,773 Pers	*-13.9%*
Total Effects	5,716 Pers	*-21.7%*	31,361 Pers	*-13.2%*	61,835 Pers	*-15.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-3,000 Pers
2nd	Land transport services and pipelines	-1,605 Pers
3rd	Sporting services, Core definition	-1,583 Pers

UK - United Kingdom

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	2,364.5 m €	23,944.3 m €	52,711.6 m €
Total Effects	5,853.4 m €	59,274.1 m €	95,237.9 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	107,928 Pers	627,201 Pers	1,239,586 Pers
Total Effects	139,275 Pers	809,366 Pers	1,738,704 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,728.4 m €	*-26.9%*	20,898.9 m €	*-12.7%*	45,216.0 m €	*-14.2%*
Total Effects	3,984.6 m €	*-31.9%*	51,810.0 m €	*-12.6%*	79,371.5 m €	*-16.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-2,330.1 m €
2nd	Sporting services, Core definition	-1,868.8 m €
3rd	Imputed rents of owner-occupied dwellings	-1,234.3 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	75,394 Pers	*-30.1%*	527,867 Pers	*-15.8%*	1,037,262 Pers	*-16.3%*
Total Effects	73,370 Pers	*-47.3%*	666,007 Pers	*-17.7%*	1,456,237 Pers	*-16.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-65,905 Pers
2nd	Accommodation and food services	-62,791 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-29,495 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,674.8 m €	*-29.2%*	20,649.3 m €	*-13.8%*	44,481.1 m €	*-15.6%*
Total Effects	3,825.0 m €	*-34.7%*	51,211.5 m €	*-13.6%*	77,869.1 m €	*-18.2%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-2,514.3 m €
2nd	Sporting services, Core definition	-2,028.4 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,376.0 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	72,635 Pers	*-32.7%*	520,499 Pers	*-17.0%*	1,018,117 Pers	*-17.9%*
Total Effects	67,739 Pers	*-51.4%*	655,111 Pers	*-19.1%*	1,429,762 Pers	*-17.8%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-71,536 Pers
2nd	Accommodation and food services	-67,747 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-35,483 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	1,554.7 m €	*-34.2%*	20,099.6 m €	*-16.1%*	43,211.5 m €	*-18.0%*
Total Effects	3,467.1 m €	*-40.8%*	49,886.2 m €	*-15.8%*	75,199.7 m €	*-21.0%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	-2,780.5 m €
2nd	Sporting services, Core definition	-2,386.3 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	-1,690.1 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	66,452 Pers	*-38.4%*	504,164 Pers	*-19.6%*	984,833 Pers	*-20.6%*
Total Effects	55,118 Pers	*-60.4%*	630,918 Pers	*-22.0%*	1,382,963 Pers	*-20.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	-84,157 Pers
2nd	Accommodation and food services	-74,876 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	-43,629 Pers

EU-27

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	30,912.7 m €	187,002.9 m €	310,678.8 m €
Total Effects	47,705.9 m €	302,504.0 m €	534,826.3 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	524,073 Pers	3,154,024 Pers	5,223,018 Pers
Total Effects	676,285 Pers	4,070,080 Pers	7,910,136 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	24,916.7 m €	166,062.8 m €	272,578.3 m €
Total Effects	37,038.8 m €	268,991.8 m €	471,052.0 m €

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	10,788.1 m €
2nd	Sporting services, Core definition	10,667.1 m €
3rd	Land transport services and pipelines	3,248.1 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	421,368 Pers	2,816,157 Pers	4,541,430 Pers
Total Effects	509,381 Pers	3,565,552 Pers	6,913,329 Pers

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	235,479 Pers
2nd	Sporting services, Core definition	166,904 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	65,872 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	24,458.7 m €	164,508.3 m €	269,274.6 m €
Total Effects	36,224.0 m €	266,550.8 m €	465,585.7 m €

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	11,786.4 m €
2nd	Sporting services, Core definition	11,481.9 m €
3rd	Land transport services and pipelines	3,558.8 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	413,704 Pers	2,792,088 Pers	4,482,490 Pers
Total Effects	496,927 Pers	3,530,002 Pers	6,828,540 Pers

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	256,706 Pers
2nd	Sporting services, Core definition	179,359 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	75,763 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	23,432.7 m €	161,099.9 m €	263,248.4 m €
Total Effects	34,397.8 m €	261,181.0 m €	455,696.6 m €

Most affected Sectors - Broad Definition, Total Effects

1st	Sporting services, Core definition	13,308.1 m €
2nd	Accommodation and food services	13,254.2 m €
3rd	Land transport services and pipelines	4,032.3 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	396,526 Pers	2,739,265 Pers	4,378,245 Pers
Total Effects	469,011 Pers	3,451,757 Pers	6,677,420 Pers

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	287,980 Pers
2nd	Sporting services, Core definition	207,274 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	89,790 Pers

EU-28

REFERENCE SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	33,277.2 m €	210,947.1 m €	363,390.4 m €
Total Effects	53,559.3 m €	361,778.1 m €	630,064.2 m €

EMPLOYMENT

	Core Definition	Narrow Definition	Broad Definition
Direct Effects	632,001 Pers	3,781,225 Pers	6,462,604 Pers
Total Effects	815,560 Pers	4,879,446 Pers	9,648,840 Pers

LOWER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	26,645.1 m €	*-19.9%*	186,961.8 m €	*-11.4%*	317,794.3 m €	*-12.5%*
Total Effects	41,023.4 m €	*-23.4%*	320,801.8 m €	*-11.3%*	550,423.5 m €	*-12.6%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	13,118.2 m €
2nd	Sporting services, Core definition	12,535.8 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	4,064.2 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	496,762 Pers	*-21.4%*	3,344,024 Pers	*-11.6%*	5,578,692 Pers	*-13.7%*
Total Effects	582,751 Pers	*-28.5%*	4,231,559 Pers	*-13.3%*	8,369,566 Pers	*-13.3%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	298,270 Pers
2nd	Sporting services, Core definition	232,809 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	95,367 Pers

MEDIUM SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	26,133.5 m €	*-21.5%*	185,157.6 m €	*-12.2%*	313,755.7 m €	*-13.7%*
Total Effects	40,049.0 m €	*-25.2%*	317,762.3 m €	*-12.2%*	543,454.8 m €	*-13.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	14,300.7 m €
2nd	Sporting services, Core definition	13,510.3 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	4,746.9 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	486,339 Pers	*-23.0%*	3,312,588 Pers	*-12.4%*	5,500,607 Pers	*-14.9%*
Total Effects	564,665 Pers	*-30.8%*	4,185,113 Pers	*-14.2%*	8,258,302 Pers	*-14.4%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	324,453 Pers
2nd	Sporting services, Core definition	250,895 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	111,246 Pers

HIGHER SCENARIO

GROSS DOMESTIC PRODUCT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	24,987.4 m €	*-24.9%*	181,199.5 m €	*-14.1%*	306,459.8 m €	*-15.7%*
Total Effects	37,864.9 m €	*-29.3%*	311,067.2 m €	*-14.0%*	530,896.4 m €	*-15.7%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	16,034.6 m €
2nd	Sporting services, Core definition	15,694.4 m €
3rd	Retail trade services, excl. motor vehicles & motorcycles	5,698.4 m €

EMPLOYMENT

	Core Definition		Narrow Definition		Broad Definition	
Direct Effects	462,978 Pers	*-26.7%*	3,243,428 Pers	*-14.2%*	5,363,078 Pers	*-17.0%*
Total Effects	524,129 Pers	*-35.7%*	4,082,675 Pers	*-16.3%*	8,060,384 Pers	*-16.5%*

Most affected Sectors - Broad Definition, Total Effects

1st	Accommodation and food services	362,856 Pers
2nd	Sporting services, Core definition	291,431 Pers
3rd	Retail trade services, excl. motor vehicles & motorcycles	133,419 Pers

ANNEX THREE: CASE STUDIES

This section contains 10 case studies, each focusing on a separate measure or initiative. These are primarily based on discussions with key stakeholders, supplemented with desk research. They are designed as a short, user-friendly introduction to a range of measures across EU Member States. While measures have been selected based on feedback that they are worth broader consideration or provide potential learning, they should not be taken to indicate that measures are necessarily efficient, effective or should be adopted more widely.

Each case study reflects the information received at the point of publication (October 2020), with it being possible that case studies would have included different information had research been conducted among different stakeholders at an alternative point during the pandemic. The content and structure of each case study is designed to reflect the nature and scope of the measure, as opposed to adopting a single set structure across every individual case study.

Case Study 1 – **Advice on travel for sport**

November 2020

Ireland

Context

Projected direct economic impact of COVID-19 in Ireland, 2020[53]		
	2020: no-COVID scenario	2020: COVID impact higher scenario
Sport-related GDP in million euros	4,238	3,656 (-13.7%)
Persons in sport-related employment	41,481	33,276 (-19.8%)

- In Ireland, the main sports played and followed include association football (soccer), Gaelic games (including Gaelic football, hurling and camogie), rugby, horse racing, basketball, motorsport, boxing, tennis, golf, hockey and rowing.
- COVID-19 related restrictions on movement were implemented in March 2020. As a result, sporting spectator events and competitions were cancelled, both at professional and amateur levels. The travel restrictions impacted many High Performing (Elite) Athletes in particular, for whom national and international travel is an essential part of normal preparation and competition.

Rationale for the initiative and scope

- In May 2020, the Irish Government announced a phased easing of the restrictions on movement as part of 'Roadmap for Reopening Society and Business'.
- Given the positive effect of sport on people's mental health, and the economic pressure facing sporting organisations, the Government created a **Return to Sport Expert Group** to help facilitate a return to sporting activity in line with the overarching Roadmap. The Expert Group includes representatives from national government, three sport governing bodies, including a specific representation for disability sport, as well as medical experts from the Sport Ireland Institute.[54] Its remit is to provide guidance to the National Governing Bodies of sport and other sporting bodies, helping ensure consistency of their return to train/play/spectating protocols with public health advice.[55]

Implementation and mechanisms

- The Expert Group met two to three times a month between June and September 2020 to review the latest developments.
- As Ireland eased its COVID-19 related restrictions as part of the Roadmap for Reopening Society and Business, the Expert Group provided guidance to national sporting organisations on how they could **recommence sporting activities over a staggered period** during the summer of 2020.
- This process involved the initial resumption of sports involving individuals or small groups of people in outdoor settings, for example, golf and tennis, and expanded to include sports involving larger groups of people, for example, hockey. Indoor activities could be undertaken in line with strict hygiene and sanitation protocols.
- In August 2020, the Expert Group produced guidance on International Travel for High Performance Sporting Activities During the COVID-19 pandemic.[56]

Take-up and results

- In June 2020, following approval by the Expert Group, individuals and teams operating at the highest levels of Irish sport could **travel to certain specified training centres within Ireland to resume training**, for example, Sport Ireland campus, Irish Sailing High Performance HQ, training venues of professional rugby and football teams.[57]

[53] All figures calculated based on estimated scenarios from economic analysis in Mapping Study on Measuring the Economic Impact of COVID-19 on the Sport Sector in the EU, 2020, Ecorys. Data in brackets shows the percentage difference between the 2020 no-COVID and higher COVID scenarios.
[54] The Expert Group presently comprises representatives from the Department of Transport, Tourism and Sport, the Sport Ireland Institute, Irish Rugby Football Union (IRFU), Gaelic Athletic Association (GAA), and Football Association of Ireland (FAI).
[55] https://www.gov.ie/pdf/?file=https://assets.gov.ie/77248/22897874-f11b-42d7-a708-4115063b009c.pdf#page=null
[56] https://assets.gov.ie/86267/8a1a9675-9e01-4f3b-b3ac-4a3230b4891a.pdf
[57] https://www.gov.ie/en/press-release/b9ab2-ministers-ross-and-griffin-welcome-governments-decision-on-resumption-of-training-for-high-performance-athletes-and-teams/

- The Expert Group's guidance on international travel enabled several of high-performance sporting events to take place in August and September 2020, for example, professional rugby games involving teams from Ireland, France, and the UK.
- Evidence from sport organisations at a September 2020 Irish parliamentary committee strongly suggested that despite positive steps, further assistance was required across the sport sector due to the financial losses being incurred as a result of the ongoing restrictions on holding large scale spectator events.[58]

> *"Sporting Organisations with diverse commercial income streams and professional staff will be impacted to a higher degree than smaller, voluntarily ran sports. Seasonal and other factors indoor/outdoor will also have differing economic impacts on sports. While some sports will be immediately impacted, other sports may not feel the economic impact of COVID until 2021 and beyond." Sport Ireland*

Implementation lessons

- By creating a Return to Sport Expert Group, the Irish Government recognised the specific needs of the sport sector in the organisation of, and travel to, sporting events. The system allowed national sporting organisations flexibility to develop their own safety protocols to best suit their needs, and to have them validated by a government-approved body. The Government has put in place a specific funding scheme to support sport organisations, but as the funds were not to be disbursed until October 2020, the Expert Group's advice in the interim allowed sport organisations to maintain some level of activity and income.
- During the COVID-19 pandemic, the Irish government intensified its cooperation with the Northern Ireland Executive to facilitate cross border travel for the purposes of sport.
- The Irish Government has shared its Expert Group guidance on international travel with other EU Member States via the EU Yammer Group for Sport.

[58] https://www.oireachtas.ie/en/debates/debate/special_committee_on_covid_19_response/2020-09-18/3/

Case Study 2 – **Support for Non-Profit Sport Organisations**

November 2020

Austria

Context

Projected direct economic impact of COVID-19 in Austria, 2020[59]		
	2020: no-COVID scenario	2020: COVID impact higher scenario
Sport-related GDP in million euros	17,377	13,855 (-20.3%)
Persons in sport-related employment	237,634	189,150 (-20.4%)

- In Austria, most sport is organised by national sports associations. These associations combined are made up of around 15,000 sport clubs.
- COVID-19 related restrictions on movement were implemented during March 2020. As a result, sporting spectator events and competitions were cancelled at professional and amateur levels.

Rationale and scope

- The Austrian Government recognised the sport sector as an area of the economy that would be particularly affected by the pandemic due to its dependence on holding events as a means of generating income.

Implementation and mechanisms of support

- The Ministry of Arts, Culture, Public Service and Sport ("the Ministry") put in place a fund to distribute **emergency liquidity support** to Non-Profit Organisations (NPOs).[60] This aimed to help cover running costs during the pandemic so that NPOs were in a position to provide services afterwards.
- NPOs covered by the scheme include sport organisations, as well as organisations providing social care, environmental conservation, education and training, historical preservation, volunteer fire stations, etc.
- Sport organisations could claim for costs incurred between April and September 2020 such as those relating to rent, upfront costs linked to cancelled events, insurance, utilities, wear and tear, accounting and marketing. Organisations can apply for the scheme up until the end of December 2020.
- NPOs submit their claims via an **online portal** (www.npo-fonds.at) where they are assessed automatically against a set of criteria. The payments are staggered according to the receipt of supporting documents (such as bills and invoices) for the claim.
- Professional sport organisations are eligible to apply to the fund for any non-profit making sections, for example, youth teams.

Take-up and results

- By the beginning of October 2020, 30% of the applications to the fund were from sport organisations, which have received 15% of the funds paid out to date.
- Data so far suggests that financial support is being provided to many organisations, albeit at relatively low levels.

Implementation lessons

- It is too early to say whether the scheme has been a success as a formal evaluation has not yet been conducted.
- Initial feedback from the Ministry is that the high level of interest in the scheme has been positive, and stakeholders hope it will be kept open beyond the current closing date.
- A potential success factor is that the scheme has been designed to be as simple and accessible as possible. Costs up to EUR 3,000 are reimbursed immediately, while costs above EUR 3,000 are reimbursed in instalments based on the receipt of supporting documentation.
- Having a simple scheme has helped NPOs which may not be familiar with issues related to VAT or legal accounting requirements.

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[59] All figures calculated based on estimated scenarios from economic analysis in Mapping Study on Measuring the Economic Impact of COVID-19 on the Sport Sector in the EU, 2020, Ecorys

[60] The scheme is called 'Non-Profit Organisation – Unterstuezungsfonds'

Case Study 3 – **National Olympic Associations**

November 2020

Context

- On 24 March 2020 the then Prime Minister of Japan, Shinzo Abe, and the President of the International Olympic Committee (IOC), Thomas Bach, announced that the upcoming Summer Olympic and Paralympic Games would be postponed until summer 2021 as a result of the COVID-19 pandemic.

Rationale for the initiatives

- In April 2020, European Olympic Committees (EOC), the umbrella body for 50 European national Olympic committees, conducted a survey of its members to assess the impact of the COVID-19 crisis on their activities.
- Results of the survey showed that national Olympic associations were themselves negatively affected by the postponement of the Games, as well as the athletes and the events and competitions that they participate in.[61]

Specific responses and initiatives

- Many sport clubs in **Germany** are non-profit organisations and, as a result, are not allowed to build up financial reserves. This has led to considerable difficulties during the pandemic, as they have become highly dependent on income from membership fees.
- As a result, the **German Olympic Sports Confederation (DOSB**) developed a 'Support our Sport' initiative aimed at providing support during the pandemic by encouraging people to remain active with their clubs and to continue paying their membership fees.
- The "Support our Sport" national level multimedia communication campaign uses professional athletes to highlight the local clubs where their careers began, and to promote the societal value of sport clubs, that will still be there after the pandemic has passed.
- The **French National Olympic and Sport Committee** (CNOSF) and the **French Paralympic and Sports Committee** (CPSF), together with the French Ministry of Sport, introduced a range of initiatives in summer 2020 to support sport organisations and their members through direct financial assistance and encouraging participation. These included:
    - 'Soutiens Ton Club': a scheme allowing individuals and businesses to make a tax-deductible donation to an amateur sport club of their choice. 10% of all donations are collected centrally and reallocated to smaller clubs who may not receive any donations.
    - 'Mon Club Près de Chez Moi': a digital platform containing contact details of registered sport clubs.
    - 'La Carte Passerelle': a card allowing young people to try out different sports free of charge.
    - '#JAILESPRITCLUB': a national communications campaign to promote continued and new membership of sport clubs.
- The **Cyprus National Olympic Committee** has put in place financial support for 12 of its professional Olympic athletes who were not able to train or compete during the COVID-19 restrictions. A monthly payment of EUR 800 is provided to help meet their costs. Similarly, the **Irish National Olympic Committee** extended its support grants to 19 professional Olympic athletes by 12 months.
- The **EOC** distributed a grant of approximately EUR 21,000 to each European National Olympic Committee (ENOC) in summer 2020 to help cover costs. It is currently preparing to allocate an approximate additional EUR 1.3 million from the Association of National Olympic Committees (ANOC)[62] Tokyo 2020 Fund to the ENOCs most affected by the pandemic.

Implementation lessons

- The French National Olympic and Sport Committee (CNOSF) highlighted its communication campaign as being particularly effective in promoting new memberships of sport clubs.
- The CNOSF identified the European Week of Sport as a helpful EU level initiative in stressing the value of sport and encouraging citizen participation in sport clubs, although planned promotional events in Paris had to be cancelled this year due to the restrictions.

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[61] https://www.eurolympic.org/eoc-unveils-results-of-covd-19-impact-on-european-sport/

[62] ANOC is the umbrella organisation responsible for protecting and advancing the interests of the world's National Olympic Committees (NOCs), and for supporting their mission to promote the Olympic Values worldwide. Over the last 35 years, the number of NOCs recognised by the International Olympic Committee (IOC) and represented by ANOC has risen to 206. https://www.anocolympic.org/anoc-new/technical-working-group-agrees-distribution-of-anoc-tokyo-2020-fund-for-nocs/

Case study 4 – **Government support for sport organisations**

November 2020

Context

Projected economic impact of COVID-19 in Romania, 2020[63]		
	2020: no-COVID scenario	2020: COVID impact higher scenario
Sport-related GDP in million euros	2,562	2,357 (-8.0%)
Persons in sport-related employment	114,305	104,277 (-8.8%)

- COVID-19 related restrictions on movement were implemented during March 2020. As a result, sporting spectator events and competitions were cancelled at professional and amateur levels.
- The Ministry of Sport (the "Ministry") provides financial support to national sport federations to enable them to hire staff, and to organise and participate in competitions. It also provides stipends for athletes representing Romania at international events.
- At present, the Ministry does not provide financial support to association football.

Rationale and scope

- Much of sports activity is conducted using public funds, either through national government or local authorities/councils.
  - The Ministry is concerned about this possible overreliance on a single source of financing, particularly given recent closures of certain clubs by local authorities.
  - As a result, the Ministry aims to encourage greater private sector investment and sponsorship in the sport sector.

Implementation and mechanisms

- At the beginning of the pandemic, the Ministry provided social welfare benefits to all professional athletes, regardless of whether this was a contractual requirement or not.
- The Government also allowed sport organisations to defer payment on bills, such as electricity and rent, until regular activities could resume. This scheme has now finished as continued funding was not sustainable.
- A scheme was established to encourage 30,000 children to participate in sport clubs by giving them a voucher for around EUR 100 to purchase sport equipment providing they are a club member for at least a year. The funding will be available during 2020 and 2021.
- The Ministry has also developed a scheme providing grants of up to EUR 100,000 for clubs to invest in areas such as sporting infrastructure and digital technology. Grants will be available from 2021 to 2027, with this approach being implemented following demand from sport clubs.
  - The scheme was based on a similar approach providing grants for small and medium-sized enterprises, ensuring wider coverage by allowing all sport-related businesses to apply.

Take-up and results

- The social welfare payments measure was effective in keeping people employed in sports. However, it was not feasible for the Government to continue it over the long term due to its high cost. The long-term impact of the scheme will not be seen until a few years' time.
- It is too soon to say whether the voucher scheme will be effective, but feedback so far from sports clubs has been positive.

[63] All figures calculated based on estimated scenarios from economic analysis in Mapping Study on Measuring the Economic Impact of COVID-19 on the Sport Sector in the EU, 2020, Ecorys. Data in brackets shows the percentage difference between the 2020 no-COVID and higher COVID scenarios.

Case study 5 – **FIBA Europe**

November 2020

Context

- FIBA, the International Basketball Federation, is the world governing body for basketball. It has five regional offices, including FIBA Europe in Munich, Germany.
- After the postponement of the 2020 Olympic Games, FIBA postponed the dates of the men's European basketball championships (EuroBasket) from September 2021 until September 2022.
- All 16 European Youth Championships (men's and women's) in three age categories across three divisions were cancelled.
- The economic loss to the four co-hosts of the EuroBasket (Germany, Czechia, Georgia and Italy) of the postponement is currently estimated at approximately EUR 1.9 million. This is mainly due to the increased costs of booking hotels and sport arenas in 2022.
- Any savings to FIBA Europe as a result of the postponement of EuroBasket are likely to be negated by the loss of sponsorship and ticket revenue in 2020. In addition, national federations had recruited extra staff to assist with the EuroBasket preparations, and these staff contracts will now need to be extended for an extra year.

Implementation and mechanisms

- The pan-European Basketball Champions League resumed in September 2020. The final games of the 2019-2020 season were played in Athens using **the 'bubble' model** adopted by the by the National Basketball Association in the USA[64] and with the support of the Greek Ministries of Sport and Health.
- Due to the ongoing COVID-19 travel restrictions in Europe, FIBA's three club level competitions will start in December 2020 instead of the original plan for September 2020. FIBA is currently seeking bids from clubs to host competitions in a bubble format. This will help the sport to resume in some Member States by:
  - Meeting Member State requirements relating to social gatherings during the pandemic.
  - Reducing travel requirements for teams, thereby facilitating participation and reducing potential infection.
- FIBA distributed EUR 4 million from its **Youth Development Fund 2020** to national federations which were supposed to take part in the European Youth Championships 2020, and to FIBA-approved projects for grassroots activities.
- FIBA continued to provide **information and online training** to basketball referees and coaches. Feedback from national federations suggested this would be beneficial both in the short and long term as it:
  - Allows matches to take place at a high standard once they were permitted to do so, thereby maintaining interest among all stakeholders.
  - Helps ensure that refereeing and coaching standards will be sustained.

Outlook for the future

- FIBA Europe is aiming to reduce costs where it can to deal with the immediate effects of the pandemic.
- The current uncertainty about whether the Olympic Games will take place in summer 2021 has further effects for regional and national sport federations in scheduling competitions and managing staff resources.
- If FIBA Europe is not able to host the EuroBasket competition in 2022 as planned, the loss of commercial income from TV and marketing may result in considerable broader financial damage to the organisation.

[64] The bubble model involves teams training and playing in one location to reduce the need to travel and minimise the overall risk of infection.

Case study 6 – **EU Member State support to an international sport organisation**

November 2020

Context

- The International Orienteering Federation (IOF) is the international governing body for all orienteering sports: orienteering, mountain bike orienteering, ski orienteering, and trail orienteering. It has 76 member countries, 40 of which are in Europe.
- The IOF works on developing the sport globally, looking to expand the sport to more geographical areas and participant groups, support its members, and organise major events (such as world championships) in different age categories.
- The cancellation of the sport's major events so far in 2020 has seen its total **income decline by 73%** due primarily to the loss of event fees and sponsorships.
- The IOF also estimates a loss of membership income of 20% in 2020 due to national member organisations being unable to pay their fees.
- The calendar of orienteering events for 2021 remains very uncertain, potentially placing additional financial pressure on the organisation.

Rationale and scope

- It has been difficult for the IOF to support member organisations given its **relatively small budget** and the limited number of members. National orienteering federations are therefore relying considerably on support from their respective national governments.

Implementation and support mechanisms

- Although orienteering is not a sport that features in the Olympic Games, the International Olympic Committee (IOC) recognises the IOF as the international body/federation representing the sport at international level. The IOF itself has applied for funding from the IOC to support its activities during the pandemic period, in particular its anti-doping testing.
- Given its headquarters' location in Sweden, the IOF has received financial support from the **Swedish Government's employee Short Time Work Allowance scheme** to cover its human resources costs in the country.[65]
- Additional funding is currently being sought via the national **Reorientation Support** for organisations that suffered significant loss of turnover during the early months of the pandemic, but there is some uncertainty at present as to whether the scheme applies to the IOF.[66]
- If the pandemic continues into 2021, the IOF hopes to continue receiving support from the Swedish Government's Short Time Work Allowance scheme. Staff redundancies are likely if support from this and/or other sources is not available on an on-going basis.

IOF comments and recommendations for the future

- There is evidence to suggest that COVID-19 may have had a positive impact to date in terms of promoting greater digitalisation in the administration of sport.
- As orienteering takes place in natural environments, it is easier to implement social distancing and other techniques to mitigate the spread of the virus.
- The IOF believes that, given the scale of financial support provided to sport, it may be appropriate to assess **the sustainability of operations** within the sector, for example, climate change, governance, and links to public health.

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[65] https://tillvaxtverket.se/english/short-time-work-allowance.html
[66] https://www.skatteverket.se/servicelankar/otherlanguages/inenglish/businessesandemployers/informationforcompaniesinconnectiontothecoronavirus/reorientationsupport.4.109dcbe71721adafd256336.html

Case Study 7 – **Federation of the European Sporting Goods Industry**

November 2020

Context

- The Federation of the European Sporting Goods Industry (FESI) represents the interests of approximately 1,800 sporting goods manufacturers (85% of the European market) through its National Sporting Goods Industry Federations and its directly affiliated member companies.
- Roughly three-quarters of FESI's membership is made up of SMEs.
- In total, the European sporting goods industry employs over 700,000 EU citizens and has an annual turnover of EUR 81 billion.

Impact of the COVID-19 crisis

- In April 2020, FESI published the results of a survey of its members on the impact of COVID-19 on their businesses.[67] This showed:
  - All FESI members taking part in the survey were negatively affected by the pandemic, with 45% of members having experienced a **loss of turnover** ranging between 50% and 90%.
  - When sporting goods stores closed, consumers switched to buying products online. Companies with efficient multi-channel retail strategies were better equipped to cope with the crisis, although results suggested that overall sales volumes were still considerably below normal trading levels.
  - The immediate challenge for companies was **liquidity** due to:
    - Large reductions in sales as physical stores shut and changed consumer behaviour.
    - Support from the banking sector was not felt to be sufficient.
    - Fixed costs (rent, employment costs, etc.) remained considerable.
  - Production was affected to varying levels depending on:
    - Governments' social distancing measures.
    - Evolution of the virus in each country / region.
    - Order cancellations from other clients.
- The **decline in tourism** also impacted sporting goods businesses, particularly those selling clothing and accessories in city centre retail premises.

Implementation of support measures

- FESI provided support and linked members to various measures implemented by EU institutions, primarily funds available via the European Investment Bank's Pan-European Guarantee Fund (EGF), the European Central Bank Pandemic Emergency Purchase Programme, COVID-19 Industrial Clusters Response Portal, and both the Coronavirus Response Investment Initiative and Coronavirus Response Investment Initiative Plus.
- FESI created a COVID-19 ad-hoc taskforce to:
  - **Update members** regularly on new initiatives at national and European levels to support EU companies (primarily those relating to payroll, real-estate, tax, and liquidity support).
  - **Engage with EU policy makers** to promote solutions identified by the sporting goods industry to help support the sector.
  - **Organise solidarity webinars** for exchanging information.
  - **List members' initiatives** to promote physical activity at home, and help authorities in fighting COVID-19, for example, the production of medical Personal Protective Equipment.
  - **Create a discussion forum** for all those in the distribution/supply chains, enabling them to address orders, supply, stocks, seasons, real estate.
- In June 2020, FESI published an overview of EU Member States' national exit strategies from the period covered by COVID-19 restrictions. This overview outlined the opening dates and public safety requirements for both retail premises and the recommencement of sport activities.

[67] https://fesi-sport.org/the-sporting-goods-industry-severely-affected-by-the-covid-19-crisis/

> *"With the compulsory closure of stores, sport clubs, gyms and cancellation of major sport events, the sporting industry was one of the sectors hardest hit by the COVID-19 crisis."*
> Neil Narriman, FESI President.

Recommendations for the future

- FESI identifies the main government support measures required by the sporting goods industry to deal with this crisis in the short term are liquidity and cash flow support, as well as efforts to reduce the tax burden on businesses.
- FESI calls on local, national, regional and EU authorities to protect and support the sport sector and maintain sport's preventive contribution for citizens' health. It argues that by building a healthier and more sustainable society, sport improves the physical and mental wellbeing of people, while helping societies to weather any future health and economic crisis.

Case study 8 – **Union of European Football Associations (UEFA)**

November 2020

Context

- UEFA is the administrative body for association football in Europe.[68] It is one of six continental confederations of FIFA, world football's governing body.
- In March 2020, UEFA postponed the European Championships competition (EURO 2020) until 2021 due to COVID-19 related restrictions, prioritising the completion of domestic leagues.

Implementation and mechanisms

- In April 2020, UEFA announced that it would make **benefit payments to clubs** which would have contributed players to UEFA national teams competing to take part in EURO 2020.
- The payments were originally scheduled to be released on completion of the play-off rounds to reach the Championship, but they were brought forward to help clubs meet their ongoing financial commitments.
  - EUR 50 million was allocated to clubs that released players for the 39 national teams not involved in the European Qualifiers play-offs.
  - EUR 17.7 million was allocated to clubs that released players for the 16 national teams taking part in the European Qualifiers play-offs (not including payments for the play-off matches, which will be paid on completion of the play-offs).
  - The balance of EUR 2.7 million, related to players released for the play-offs, will be distributed upon completion of these play-off matches in autumn 2020.[69]
- Also in April, UEFA released money from its existing **'HatTrick' funding**,[70] with the fund being amended to meet the challenges of COVID-19:
  - EUR 236.5 million was released across the 55 member associations. Each association was allowed to set its own priorities so that the negative effect of COVID-19 could be dealt with in each context. This provided more targeted assistance than would have been allowed under the fund previously, which was solely designed to cover running costs.
- UEFA's Innovation Hub participates in the 'Reimagine Football' project with several other football organisations and companies to **develop innovative ideas** to help football during the pandemic, for example, an app that can remotely guide players in their rehabilitation from injuries.[71]

Take-up and results

- Funding from UEFA enabled national leagues to complete their 2019-2020 seasons where appropriate and to start their 2020-2021 seasons at a similar time to previous years.

Additional considerations

- Despite this level of financial support, FIFPRO, a players' global representative body, highlighted that:
  - The pandemic has resulted in a loss of income for clubs in the lower football leagues, particularly those that don't receive broadcast revenue. Players have had their wages cut or been made redundant, and in some cases, clubs have gone bankrupt.
  - There is a need for greater visibility of women's football, but this will be harder to achieve if it is put behind fee-based viewing platforms, for example, websites restricted to paying subscribers, in order to recoup reduced income from other sources, such as ticket sales and matchday sales.

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[68] Several member countries are primarily or entirely located in Asia.
[69] https://www.uefa.com/insideuefa/about-uefa/news/025c-0f8e77f5f6c7-5e481e4f75d1-1000--uefa-euro-2020-club-benefits-paid-in-advance/
[70] UEFA's HatTrick assistance programme was launched in 2004 following the UEFA European football championships that took place in Portugal. The scheme invests a large proportion of the European championship revenue back into football development via three mechanisms: investment, education and knowledge-sharing.
[71] https://www.uefa.com/insideuefa/about-uefa/news/0261-1067779aca5c-a5bc4da3bf70-1000--uefa-supporting-innovative-ideas-to-tackle-the-impact-of-covid-/

Recommendations for the future

- Football is the leading sport in Europe, with many other sports following the COVID-19 response measures that it has implemented to restart domestic competitions, develop testing regimes for players, use neutral venues, etc.
- Stakeholder feedback suggested the potential to reform **'Financial Fair Play'** rules at national and European levels, including two primary focuses:
  - Transparency around the financing of football.
  - Emphasis on longer-term sustainable funding structures.
- Other potential areas to examine included:
  - Protecting broadcast revenues by further developing the EU's digital single market.
  - Working to develop legislation on broadcast piracy and illegal streaming.

Case Study 9 - **Public-private partnerships for innovations in sport and vitality**

November 2020

Context

- Sport and vitality covers the sport and fitness, nutrition, and healthcare sectors.
- This area is seen as having **potential for innovation and growth** through cross-sectoral spill-overs and links with various societal and economic fields. However, they are seen as remaining underdeveloped at regional level due to a lack of understanding of their potential.
- A number of organisations and platforms have been created to support cooperation between the public and private sectors in the areas of innovation for sport and vitality, including ClusSport.[72]
- ClusSport is a partnership organisation supported by the European Commission, EPSI[73] and a number of Member State regions. It aims to **implement concrete interregional cooperation and co-investment projects in sport and vitality.**

Rationale and scope for future work

- The traditional business models of many sport organisations are struggling due to the COVID-19 restrictions on movement and large gatherings of people.
- Given the importance of healthy active lifestyles during the pandemic, it is important that sport organisations innovate in order to continue providing their goods and services. Examples include gyms providing exercise classes remotely using digital platforms, and coaches training athletes remotely using data provided by wearable technology such as GPS watches.

Implementation and mechanisms

- ClusSport has mapped out assets, fields of expertise and future projects related to innovation for sport and vitality in all partner regions. This has highlighted excellent practice at regional level as well as synergies between regions that can be channelled into potential cooperation projects.
- The main areas of focus are:
  - Smart Sport Wearables: ICT-embedded sporting goods.
  - Smart Sports Environment and Internet of Things: sport performance monitoring and new approaches to training and fitness.
  - Health Active Lifestyle nudging[74] by innovative solutions.
- ClusSport and EPSI organised a cross-regional webinar in May 2020, with the importance of innovation and new business development through public private partnerships being stressed.

Take-up and results

- One of the main challenges has been to **convince private sport companies** to participate in these new partnerships as the benefits may not be immediately visible to them.
- The upcoming 'OP ZUID' South Netherlands regional development plan will focus on innovation with economic return and social impact in five economic areas that are changing rapidly: energy, raw materials, climate, agriculture and food and health. ClusSport plans to focus on health transitions and establish an innovation hub for sport and vitality as part of a bigger EU network of innovation hubs. In doing so, it plans to incorporate good practice in the sport and vitality sector from other areas, such as Valencia and Lapland.

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[72] https://sportsandtechnology.com/en/news/

[73] The European Platform for Sport Innovation (EPSI) is a non-profit networking organisation of national sport and innovation networks.

[74] 'Nudging' is based on behavioural science, and works by designing choices for people which encourage them to make positive small-scale decisions for themselves which also ideally benefit society and the environment.

Case Study 10 – **Portuguese Institute of Sports and Youth**

November 2020

Portugal

Context

Projected direct economic impact of COVID-19 in Portugal, 2020[75]		
	2020: no-COVID scenario	2020: COVID impact higher scenario
Sport-related GDP in million euros	2,484	2,113 (-14.9%)
Persons in sport-related employment	75,081	62,799 (-16.4%)

- The Portuguese Institute of Sports and Youth (IPDJ) is a government-funded organisation responsible for the implementation of sport and youth policy in Portugal.
- It promotes participation in amateur sport at grassroots and high levels, and provides technical, human and financial assistance to sport organisations.
- It operates the Sports House, the National Sports Museum, and the National Sports Centre at Jamor.

Rationale for the initiative and scope

- Following the implementation of COVID-19 related restrictions on sport activities, the IPDJ developed several schemes to support sport organisations during a period of inactivity and to promote continued participation in sport activities by the general population.

Implementation and mechanisms

- **Public accreditation of sport organisations:** National level sport organisations receiving public funding in Portugal need to be legally recognised by the state. This is renewed every four years. Following the postponement of the 2020 Summer Olympics, the national accreditation procedure was also postponed until 2021, thereby lessening the administrative burden on organisations requiring accreditation or reaccreditation in this period.
- **Flexibility in sport organisations' contractual obligations:** In order to help sport organisations during the pandemic, the IPJD delayed its deadlines for receipt of 2019 annual reports and digitised most of the related procedures.
- **Continued support to elite amateur sports:** IPDJ continued its financial support to elite amateur sport at the same levels agreed prior to the pandemic, providing them with steady income during this period.
- **Communication:** IPDJ carried out a survey of sport organisations to collect real time data on the impact of COVID-19 and to inform support plans. It also implemented an online campaign similar to the EU's #BeActiveAtHome campaign to promote exercise at home, focusing on the previously inactive.

Take-up and challenges

- IPDJ faced challenges in implementing measures relating to the pandemic, primarily in reaching organisations so they could understand their issues. As a result, IPDJ is seeking to reach grassroots clubs by working more closely with national umbrella organisations, such as the National Olympic and Paralympic Committees.
- Another challenge in supporting sport organisations is that many of them rent their facilities from schools. This option is now much more restricted due to COVID-19 and the stricter hygiene protocols being observed in schools.

Additional considerations

- IPDJ believes it will be essential that the sport sector works towards a cross-sectoral and coordinated approach to address the economic impacts of COVID-19. Sport organisations should be able to access
- programmes in other areas of economic development, such as employment programmes, and research and innovation programmes.
- IPDJ is working at European level and in cooperation with Ibero-American countries[76] to provide information on policies to deal with the economic impact of COVID-19 on the sport sector.

[75] All figures calculated based on estimated scenarios from economic analysis in Mapping Study on Measuring the Economic Impact of COVID-19 on the Sport Sector in the EU, 2020, Ecorys. Data in brackets shows the percentage difference between the 2020 no-COVID and higher COVID scenarios.

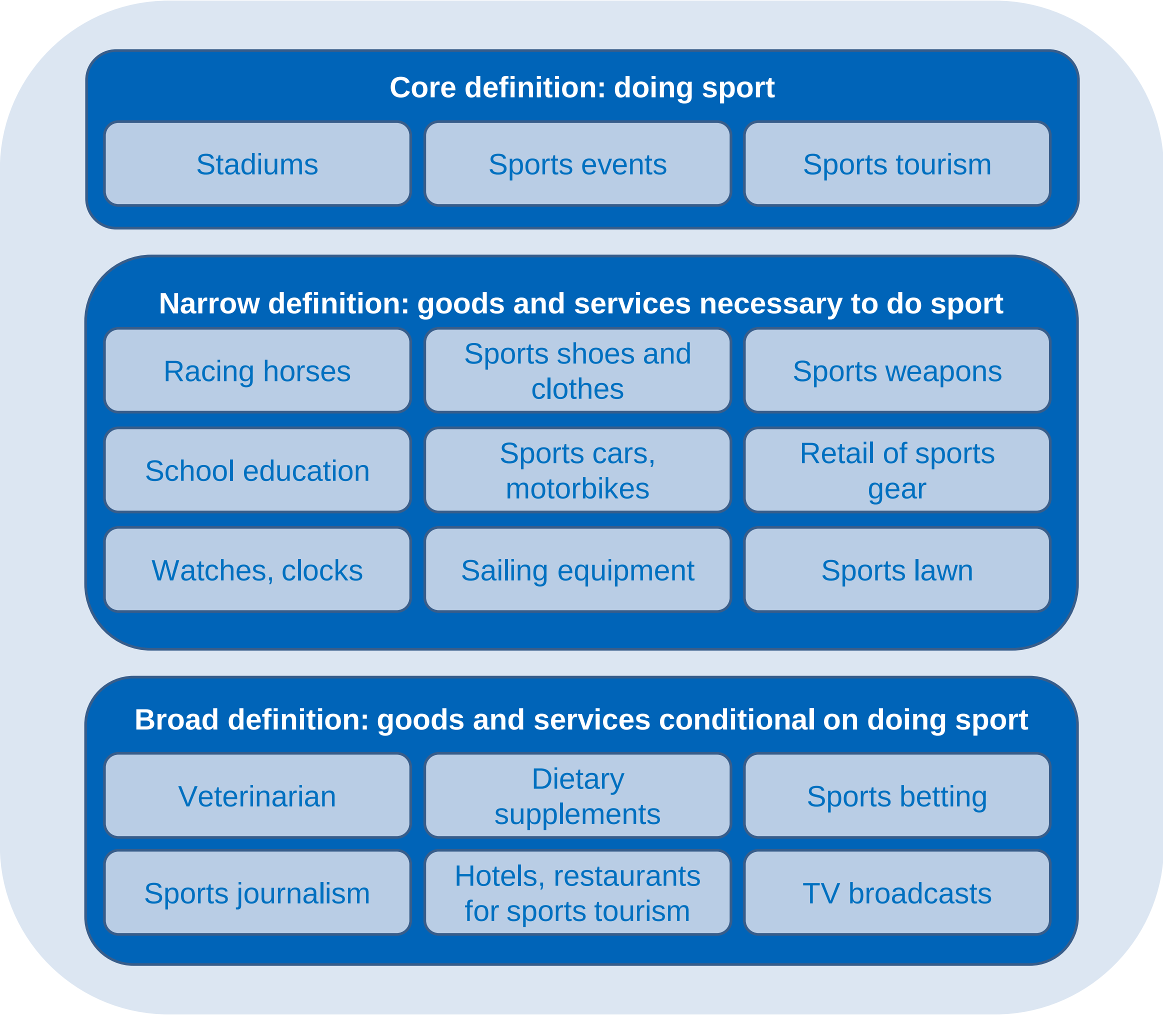
[76] Portugal works with Ibero-American countries in the framework of the Ibero-American Council of Sport (http://coniberodeporte.org/en/countries), and in close cooperation with the Organisation of Ibero-American States (OEI) (https://www.segib.org/en/ibero-american-organizations/)

Annex four: Vilnius definition of sport

Figure 11 shows the full Vilnius definition of sport. This includes three separate levels: core, narrow and broad.

The core definition contains sector '93.1 Sporting services' (from the Statistical classification of economic activities in the European Community categorisation) which includes sport clubs, sport facilities and sport events. The narrow definition takes the core and enlarges it by incorporating all goods and services necessary to do sport, such as sport equipment or education. The final layer is the broad definition, which again contains the narrow definition but adds all goods and services which need sport as an input but are not needed to do sport. As an example, sport betting requires sport, but one can do sport without betting on it. Therefore, betting belongs to the broad definition in a similar way to other goods or services such as sport media, insurance or sport tourism.

Figure 11 Vilnius definition of sport



ANNEX FIVE: SPORT SATELLITE ACCOUNTS WITH INPUT-OUTPUT TABLE

Sport Satellite Accounts

Sport Satellite Accounts (SSAs) or Sport Satellite Systems (SSSs) provide a detailed statistical framework for measuring the economic importance of the sport sector, accounting for elements which would otherwise remain invisible as they are included as part of other sectors. They therefore form extensions to the System of National Accounts (SNA) when an SNA provides a different type of categorisation. An SSA is usually created using the Vilnius definition of sport, based on available sectoral data for sport-related activity and any intermediate goods and services.

Input-Output Table

An Input-Output Table (IOT) or a Supply and Use Table are used as core elements of any SSA. This study uses a specific type of IOT known as a Multiregional Input-Output Table for Sport (MR-IOT:S). This is a sector-specific set of data which accounts for the flow of intermediate goods and services across the EU-28. As an example, if a company in Spain purchases steel from Poland to produce a swimming pool, the GDP and employment generated in Poland can be calculated correctly using a MR-IOT:S. Imports are only recorded as such in these models if they originate from countries outside the EU-28. This is not possible with national models, as imports in those models are based on an outflow of Gross Value Added from the domestic country to another country (as opposed to from outside the EU).

An IOT-based SSA has the advantage that it allows for the directly sport-related effects to be calculated and the impact on the supply network which constitutes the indirect effects. This allows the effects on the supply-network to be calculated in detail.[77] Direct and indirect effects can then be added together to produce data for the total effect.

Figure 12 shows an example of an IOT-based SSA, with the basic structure being that:

- Rows report how much of each good ('Good 1'' to 'Good 2S') was sold to other companies (upper left) or final consumers (upper right). As an example:
    - Four units of Good 1' were sold to the producers of goods (the five leftmost values in the first row)
    - Seven unit of Good 1' were sold to final consumption (the right-hand part of the first row)
    - This therefore shows 11 units of Good 1' were sold in total
- Columns show what is necessary for the production of each good. As an example, the leftmost row show
    - Two units of intermediate goods are required (upper part of the row),
    - One unit of imports is required
    - One unit of taxes less subsidies on products
    - Seven units of GVA (lower part of the row).
    - In total, 11 units of Good 1' are produced

As noted, the total number of units of Good 1' are produced as are sold.

[77] This accounts not only for the first round of suppliers is considered, but the suppliers of the suppliers and their suppliers etc.

The orange cross shows the SSA as the extension to the normal IOT. Black values remain unchanged (compared to the standard IOT), red values indicate that they were higher originally, but are now (partially) booked in the SSA. White cells contain no sport at all, while brown numbers contain sport only (therefore allowing these specific values to be easily identified).

Goods are given different standard terminology to refer to their status in the sport category. As an example: Good 2 refers to a range of goods which is in one category in the original IOT (e.g. 'shoes'). Good 2' represents all non-sport-related shoes, while Good 1S refers to all sport-related shoes.

As a further example, Good 2 originally used 17 of its own produced units for itself (not shown in the figure). However, separating Good 2' (non-sport) and Good 2S shows that:

- 11 units were sent from Good 2' to Good 2' (the red '11' in the upper left part).
- units were sent from Good 2' to Good 2S (the brown '2' in the second row).
- units were sent from Good 2S to Good 2' (the brown 3 in the second column from the left).
- 1 unit was sent from Good 2S to Good 2S (the lower right '1' in the intersection of the SSA).

As a result, this analysis allows us to account for all the 17 units, with data showing the exact inter-relation between the sport and non-sport elements of Good 2.

Figure 12 Simplified Sport Satellite Account and Input-Output-table

	Good 1'	Good 2'	Good 3	Good 1S	Good 2S	Total	Private Consumption	Public Consumption	Final Consumption	Capital Formation, Valuables,	Exports	Total Final Use	Total Use
Good 1'	1	1	1	0	1	4	3	0	3	3	1	7	11
Good 2'	1	11	10	1	2	25	6	0	6	7	1	14	39
Good 3	0	10	10	0	0	20	5	5	10	5	7	22	42
Good 1S	0	0	0	0	0	0	2	0	2	3	2	7	7
Good 2S	0	3	0	1	1	5	4	0	4	3	1	8	13
Total	2	25	21	2	4	54	20	5	25	21	12	58	112
Use of imported products	1	2	2	0	1	6							
Taxes less subs. on products	1	-3	2	0	1	1							
Total	4	24	25	2	6	61							
Employees' comp.	1	1	3	0	1	6							
Cons. fixed capital	2	2	3	1	2	10							
Oth. taxes on production	3	11	8	3	3	28							
Operating surplus	1	1	3	1	1	7							
Gross Value Added	7	15	17	5	7	51							
Output	11	39	42	7	13	112							

Source: SpEA, 2020

Multipliers

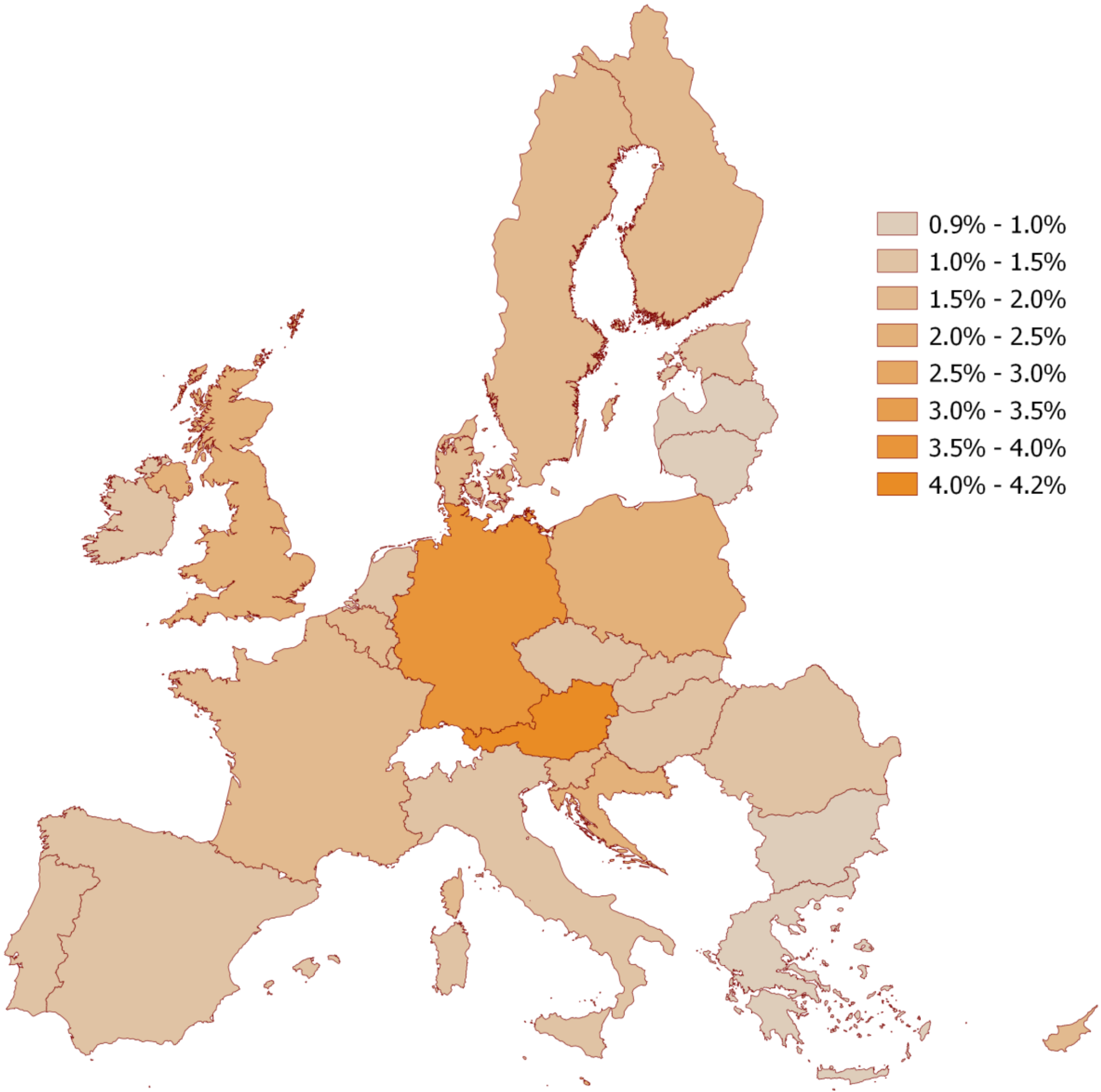
Using data from an IOT-based SSA, a multiplier can be calculated to show the fraction of total effects to direct effects, based on the total effects (direct and indirect) divided by the direct effects. For example, a GDP multiplier of 1.50 means that for every euro of GDP generated in directly sport-related companies and institutions, GDP worth another 50 cents is generated in the supply network (indirect effects). This includes the effects caused by the sector or Member State, namely the outgoing effects. In the sections of the report covering the COVID-19 impact, the total effect always includes incoming effects received by a Member State or sector. Multipliers are EU-wide, meaning that if a company in Spain purchases steel from Poland (as in the previous example), the GDP can be attributed correctly to the economy where it was generated.

In a MR-IOT, a multiplier can refer to the domestic region's economy or to all regions. As there are practically always effects outside of the domestic Member State, with countries relying on imports from other Member States, multipliers tend to be lower for a domestic economy than when the EU-level figures for that country are calculated. This is as small economies generally need to import more, while larger ones are more self-sufficient. As an example in a no-COVID scenario for 2020, Luxembourg has a 1.91 GDP-multiplier on the EU-level (every euro of GDP in Luxembourg leads to another 91 cents of GDP somewhere in the EU) due to the sizeable imports from other EU Member States, but only 1.31 in its domestic economy (every euro GDP in Luxembourg leads to another 31 cents of GDP within Luxembourg). This difference is due to the fact that, for example, some of the suppliers of a Luxembourg-based company are situated within the EU, but outside of Luxembourg. GDP generated outside of Luxembourg adds to the EU multiplier, but not to the Luxembourg multiplier.

ANNEX SIX: DIRECT GDP EU-28 MAP

The following map shows the direct sport-related GDP of Member States in 2020 (including UK) presuming that there was no COVID-19 (reference scenario).

Figure 13 Direct sport-related GDP 2020. Reference scenario



Source: SpEA, 2020

ANNEX SEVEN: SECTORAL COMPARISON TABLE

The following table shows the impact of COVID-19 on every sector of the input-output tables given the different scenarios. The first row (italicised) contains the core elements of the Vilnius definition of sport. All values are totals, thus including direct as well as indirect effects.

Table 16 Sectoral impact of COVID-19, total effects. EU-28

	Lower		Medium		Higher	
	GDP in m Euros	Employees in persons	GDP in m Euros	Employees in persons	GDP in m Euros	Employees in persons
Core Definition, Sporting services	*12,536*	*232,809*	*13,510*	*250,895*	*15,694*	*291,431*
Products of agriculture, hunting and related services	541	13,972	587	15,141	660	17,054
Products of forestry, logging and related services	91	1,776	99	1,925	114	2,209
Fish and other fishing products; aquaculture products	30	482	32	523	37	592
Mining and quarrying	208	1,938	226	2,094	259	2,392
Food, beverages and tobacco products	1,173	15,641	1,271	16,948	1,430	19,037
Textiles, wearing apparel, leather and related products	156	4,088	169	4,422	193	5,051
Wood and of products of wood and cork, except furniture	134	3,043	145	3,290	167	3,774
Paper and paper products	180	1,961	195	2,122	222	2,410
Printing and recording services	226	4,063	245	4,374	279	4,962
Coke and refined petroleum products	117	1,526	126	1,654	147	1,930
Chemicals and chemical products	366	2,576	397	2,787	454	3,183
Basic pharmaceutical products and pharmaceutical preparations	147	808	162	895	190	1,051
Rubber and plastic products	330	4,841	358	5,251	412	6,032

Other non-metallic mineral products	234	3,485	254	3,770	293	4,337
Basic metals	132	1,816	144	1,966	165	2,260
Fabricated metal products, except machinery and equipment	445	7,124	482	7,716	555	8,874
Computer, electronic and optical products	150	1,978	163	2,154	188	2,474
Electrical equipment	201	2,490	218	2,699	250	3,093
Machinery and equipment n.e.c.	155	2,419	168	2,620	192	2,998
Motor vehicles, trailers and semi-trailers	802	10,020	868	10,833	1,008	12,543
Other transport equipment	613	8,481	661	9,136	766	10,569
Furniture and other manufactured goods	556	11,607	598	12,466	689	14,308
Repair and installation services of machinery and equipment	308	3,979	333	4,296	380	4,908
Electricity, gas, steam and air conditioning	799	4,497	867	4,876	987	5,549
Natural water; water treatment and supply services	146	1,422	158	1,531	180	1,743
Sewerage services; sewage sludge; waste collection, treatment and disposal services	410	3,972	445	4,300	507	4,882
Constructions and construction works	2,953	47,226	3,206	51,180	3,720	59,280
Wholesale and retail trade and repair services of motor vehicles and motorcycles	1,469	25,491	1,594	27,637	1,847	32,104
Wholesale trade services, except of motor vehicles and motorcycles	2,242	19,999	2,430	21,654	2,769	24,714
Retail trade services, except of motor vehicles and motorcycles	4,064	95,367	4,747	111,246	5,698	133,419

Land transport services and transport services via pipelines	3,701	59,781	4,052	65,344	4,588	73,856
Water transport services	318	6,220	346	6,796	389	7,640
Air transport services	579	6,501	597	6,708	637	7,152
Warehousing and support services for transportation	1,103	13,761	1,202	15,008	1,364	17,054
Postal and courier services	425	8,134	468	8,910	538	10,207
Accommodation and food services	13,118	298,270	14,301	324,453	16,035	362,856
Publishing services	491	6,575	530	7,096	608	8,098
Motion picture, video and television programme production services, sound recording and music publishing	1,353	13,969	1,464	15,120	1,706	17,633
Telecommunications services	491	1,971	532	2,134	607	2,435
Computer programming, consultancy and related services; Information services	1,131	11,359	1,228	12,295	1,404	14,008
Financial services, except insurance and pension funding	1,359	9,032	1,476	9,792	1,683	11,143
Insurance, reinsurance and pension funding services, except compulsory social security	218	1,666	237	1,811	272	2,069
Services auxiliary to financial services and insurance services	318	3,555	345	3,870	392	4,423
Real estate services excluding imputed rents	2,843	2,257	3,108	2,461	3,551	2,813
Imputed rents of owner-occupied dwellings	1,625	1,636	1,763	1,775	2,014	2,028

Legal and accounting services; services of head offices; management consultancy services	1,954	20,307	2,125	22,046	2,434	25,203
Architectural and engineering services; technical testing and analysis services	620	8,940	673	9,704	772	11,118
Scientific research and development services	166	814	182	884	210	1,020
Advertising and market research services	511	4,950	555	5,378	636	6,155
Other professional, scientific and technical services and veterinary services	441	10,400	476	11,259	545	12,984
Rental and leasing services	1,226	2,492	1,331	2,699	1,519	3,082
Employment services	915	4,942	994	5,363	1,147	6,187
Travel agency, tour operator and other reservation services and related services	582	9,628	628	10,362	720	11,872
Security and investigation services; services to buildings and landscape	1,457	31,401	1,580	34,007	1,805	38,788
Public administration and defence services; compulsory social security services	2,282	34,076	2,462	36,772	2,847	42,514
Education services	1,975	38,640	2,128	41,637	2,461	48,129
Human health services	1,107	17,919	1,375	22,057	1,882	29,902
Residential care services; social work services without accommodation	220	7,595	239	8,247	274	9,468

Creative, arts, entertainment, library, archive, museum, other cultural services; gambling and betting services	3,785	75,089	3,829	75,588	3,922	76,635
Sporting services and amusement and recreation services	518	11,438	555	12,257	636	14,063
Services furnished by membership organisations	442	7,077	479	7,673	558	8,910
Repair services of computers and personal and household goods	164	2,173	177	2,347	203	2,685
Other personal services	263	5,486	285	5,936	325	6,766
Services of households as employers	28	320	30	347	35	397
Services provided by extraterritorial organisations	0	0	0	0	0	0
Total	79,641	1,279,274	86,609	1,390,538	99,168	1,588,456

Source: SpEA, 2020.

Note that the names of some sectors were shortened to enhance readability. With the exception of the first row (Core definition), the sectors are in the same order as in the System of National Accounts.

"n.e.c.": "not elsewhere classified".

ANNEX EIGHT: MEASURES AND INITIATIVES TABLE

The table below provides a brief description and overview of the different measures and initiatives mentioned in the report, alongside some additional selected examples of other measures and initiatives from the research. They are split first by typology, and then by the different types of project within each typology. The third column lists a selection of example measures and initiatives within each sub-typology. These examples are time-specific and are not intended as a comprehensive overview of all measures and initiatives across every EU Member State.

Typology	Summary of different types of initiative and measures within each typology	Selected examples of initiatives and measures
1. New Structural grants and funding approaches	• Large scale, state financed initiatives, targeting multiple sections of the sport sector, across both professional and grassroots sport.	• COVID-19 funding support of the national sport sector (Ireland). • Federal 'Rehabilitation of municipal facilities in sports, youth and culture' fund (Germany). • National sport sector grant to support amateur and professional sport (Latvia).
	• State financed measures targeted at specific sub-sections of the national sport sector.	• Culture and sport financing initiative for organisations that have lost revenue due to public health restrictions on public gatherings (Sweden). • Non-profit Organisations Support Fund (Austria). • Innovation fund for using smart technologies to create new business, fund new business models and stimulate innovation programmes (Netherlands).
	• Decentralised, community funded initiatives that establish a platform for communities to donate and allocate money to sport organisations and sport clubs.	• 'Je Soutiens Mon Club'. Crowdfunding platform supported by the French Sports Foundation and Ministry of Sport, with a levy placed on donations to help specifically support organisations with the highest need (France). • 'Support you Sport'. Initiative encouraging the public to donate money to support sport clubs facing COVID-19 related challenges (Germany).

2. Exemption, postponement, or deferral of obligations	• Reducing or exempting organisations from tax, debt, rent and social security obligations.	• Rent holiday and cash flow support initiative (Netherlands). • Temporary suspension of requirement for small and medium sized enterprises to pay social security obligations (France). • Suspension of social security and rent payments to public administrations (Italy). • Rent, land tax and sport equipment rental cost exemption for sport organisations in Vilnius (Lithuania).
	• Amending rules around the fulfilment of contractual obligations.	• Broadcast agreement by Deutsche Fußball Liga with partners for the payment of fees in tranches, partly payable upfront and partly payable for when competition resumed (Germany). • Bespoke agreement between Ligue de Football Professionnel and broadcasters BeIN Sports and Canal+ to pay a reduced amount for matches and recover the shortfall in broadcast revenue via a state guaranteed loan (France).
	• Changing rules around the deferral of ticket reimbursements for cancelled and postponed events.	• Legislative change to allow vouchers to be offered in lieu of cash refunds for cancelled or postponed events (Germany, Italy, Poland).
3. Extension and adjustment of pre-existing support measures	• Increasing the financial scope of existing support measures to meet increased demand and need for support.	• Additional funding made available by the European Olympic Committees within its Olympic cycle funding mechanisms for National Olympic Committees (Europe). • Continuation of state stipend to professional athletes who could not compete at cancelled events (Lithuania).
	• Adjusting existing support measures to enable money to be utilised in more flexibly, to match changed financial needs.	• Changing the expenditure rules of UEFA's 236.5 million EUR 'HatTrick' initiative to allow member associations to use the money to specifically target COVID-19 related issues (Europe). • Transference of support funds originally intended for international sport event participation over to sport facility funding and support (Malta).
4. Advancement of payments	• National schemes to advance the payment of existing initiatives backed by governments and national sport bodies.	• The early payment of public subsidies to sport associations by the French National Sports Agency (France). • Advancement of national subsidy to sport federations (Malta).
	• International schemes to advance payments across multiple countries by international sport bodies.	• The release of benefit payments by UEFA to professional football clubs prior to the completion of postponed EURO 2020 qualifier matches (Europe).

5. Furlough Schemes	• General government supported schemes to pay a proportion of employee wages across multiple economic sectors, including the sport sector.	• Scheme paying up to 67% of net wages lost due to shorter hours up to 6,700 EUR per month (Germany). • Scheme paying up to 84% of net salary up to 6,927 per month (France). • Scheme paying 75% of gross wages (or 90% if paid hourly) with requirement for employers to top up to 100% of previous salary (Denmark).
	• Targeted government schemes to specifically support the wages of employees in economic sectors where revenue streams have been directly affected by COVID-19 restrictions.	• 'Partial activity' furlough scheme extension for companies in the hotel, restaurant, cafe, tourism, events, sport, culture, and related sectors (France).
6. Allowances for freelancers and athletes	• General government schemes to support freelancers and self-employed across multiple economic sectors.	• Short term unemployment fund worth up to 84% of net normal income for freelancers and self-employed (France). • 600 EUR payment to self-employed individuals (Italy).
	• Targeted government schemes to specifically support freelancers and self-employed individuals within the sport sector.	• Scheme to support freelancers and individuals working under 'sport activity contracts' providing 75% of average gross income (Romania).
	• Schemes supported by sport federations to provide financial support to professional athletes and their coaches.	• Welfare fund worth up to 3,406 EUR per applicant implemented jointly by World Athletics and the International Athletics Foundation to support professional athletes (Europe/Global).
7. Information resources and guidance	• Provision of guidance and support to meet new health and safety requirements relating to COVID-19.	• Information and guidance on health and safety protocols provided by National Olympic Committees to guide sport organisations (France, Belgium, Netherlands). • Publication of official guidelines for sport clubs and sport facilities on conducting activities and events in a 'COVID-19 secure' manner (Belgium).
	• Provision of guidance and support relating to financial, business and organisational issues due to COVID-19 rerlated restrictions.	• Support and financing of research and development programmes to help organisations access economic opportunities relating to health, sustainable cities, the digital economy, and the circular economy (France). • Innovation fund to help sport organisations build understanding of new technologies to create new business opportunities (Netherlands). • Guidance and support fund for sport businesses to help them renew business models to work within COVID-19 restrictions (Netherlands).

8. Other measures and intiatives	• Other bespoke and innovative apporaches to address needs in specific contexts.	• Scheme to encourage children to take part in sport by providing them with a 100 EUR voucher for sport equipment (Romania). • Temporary emergency changes to UEFA's Financial Fair Play rules so that football clubs are not unduly penalised for breaking financial mismanagement rules due to reduced income (Europe). • Investment strategy for national broadband installation to support the online economy (France). • 5.3 billion EUR online retail scheme supporting small retailers to maximise opportunities in e-commerce (Ireland).

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