



**POLSKA RADA
CENTRÓW HANDLOWYCH**
POLISH COUNCIL
OF SHOPPING CENTRES

Council Survey on COVID-19

Warsaw 14.04.2020



Countries and national councils that took part in the survey:

Portugal

Portuguese Council of Shopping Centers 3

Italy

Consiglio Nazionale dei Centri Commerciali 5

Belgium

Belgian Luxembourg Council of Retail and Shopping Centers 7

Switzerland

Swiss Council of Shopping Places 8

France

Conseil National des Centres Commerciaux 9

Spain

Asociación Española de Centros y Parques Comerciales 10

Germany

German Council of Shopping Places 11

Netherlands

NRW (The Netherlands) 12

Austria

Austrian Council of Shopping Centers 13

Czech Republic

Czech Committee of Shopping Centre Association 14



Portugal

Portuguese Council of Shopping Centers

What is closed and since when? Which retailers can still operate?

Everything suspended, Since 16th of March till 17th of April, except:

- Minimarkets, supermarkets, hypermarkets;
- Fruit shops, butchers, fishmongers, bakeries;
- Traditional Neighborhood Markets, in the case of sale of food products;
- Agri-food production and distribution;
- Fish-Markets;
- Catering and drinks, under the terms of this decree;
- Preparation of meals ready to take home, under the terms of this decree;
- Medical services or other health and social support services;
- Pharmacies and places of sale of medicines not subject to medical prescription;
- Establishments of medical and orthopedic products;
- Opticians;
- Establishments of cosmetic and hygiene products;
- Establishments of natural and dietary products
- Essential public services and respective repair and maintenance (water, electricity, natural gas and liquefied petroleum gas, electronic communications, postal services, wastewater collection and treatment services, wastewater collection and treatment services, wastewater services management of urban solid waste and urban hygiene and passenger transport service);
- Stationery and tobacconists (newspapers, tobacco);
- Social games;
- Veterinary clinics;
- Establishments selling pet animals and their food;
- Establishments selling flowers, plants, seeds and fertilizers;
- Textile and fur washing and dry-cleaning establishments;
- Drugstores;
- Hardware stores and stores selling DIY materials;
- Fuel stations;
- Establishments selling fuels for domestic use;
- Establishments for the maintenance and repair of motor vehicles and motorcycles, tractors and agricultural machinery, as well as the sale of parts and accessories and towing services;
- Establishments for the sale and repair of household appliances, computer and communications equipment and respective repair;
- Banking, financial and insurance services;
- Funeral and related activities;
- Home maintenance and repair services;
- Security or home surveillance services;
- Cleaning, disinfection, rat removal and similar activities;
- Home delivery services;
- Tourist establishments, except campsites, which can provide food and beverage services on the establishment itself exclusively for the respective guests;
- Services that guarantee student accommodation.
- Activities and establishments listed in the previous numbers, even if integrated into shopping centers.



What governmental support is provided to retailers in your country?

A moratorium on rent (service charges are not clear), that will last as long as the State of Emergency is in effect, plus 1 month. After this period, the postponed rents should be paid on the 12 next months, in twelfths added to the respective month's income.

What government support is provided to landlords?

Nothing for now.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

There isn't a common position among the members. We believe that this huge mess, only have solution with a case-by-case negotiation. The law is quite clear, and allows the moratorium, not talking about income forgiveness or discounts in rents. We do understand that the GOV should not meddle in private law.

Any agreements with banks?

No, so far.



Italy

Consiglio Nazionale dei Centri Commerciali

What is closed and since when? Which retailers can still operate?

All „unessential” retail (most of non food, bars and restaurants, hairdressers etc.), schools, cinemas theatres, gym, entertainment places are closed by law since half of march. Since March 26 all unessential industries and offices (except a specific long list included in the decree) and building sites are closed.

Companies that can still operate:

- Hat means foodstores of any size (in shopping centers and outside);
- Pharmacies and parapharmacies;
- Toiletry and perfumes;
- Electronics;
- Hardware;
- Pet store;
- Newsstand;
- Tobacconists;
- Gas stations;
- Cleaners;
- Funeral homes;
- Mechanics;
- Electricians and other repairmen;
- Banks;
- Post offices

The list of activities to open is national, but some Region and municipalities have applied more restrictions.

The activities that can open must operate with specific safety rules, such as distance, personal protection device and so on.

Not all activities allowed to open really do. Many have preferred to close or to limit opening hours.

What governmental support is provided to retailers in your country?

The only specific assist for retailers is the possibility of considering 60% of the rent of march as an anticipation on taxes (but this dos not apply to all retailers, and excludes most tenants of shopping centers. Retailers may benefit of all the support given to all economic activities (postponement of tax payment, emergency payment of a quotq of salaries by the government for a maximum of 9 week, postponement of payment of bank loans and, in the future, some extraordinary support for new banking or public financing (this should be defined by yhe government within next week)



What government support is provided to landlords?

No specific support to landlords except the ones that can be applied to all companies.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

No public moratorium on rents. Solutions will have be found with private agreements between landlords and tenants. The Nation Council is working on moral suasion to avoid evictions and favor agreements, based also on the fact that the pandemics can legally de defined as a "major force event,,.

Any agreements with banks?

There is a national agreement with ABI (the association of bankers) to postpone the payment of loans and prolongate the duration on existing financing. The government will guarantee 30% of the risk sociation of bankers.

Other important information

The Italian Council has made several request to the government, such as, the extension of the 60% tax credit on rents, a forfeit tax reduction corresponding to 0% of the previous year turnover and a 50% cut in VAT for all nonfood retail for the first month after the reopening (excluding online).



Belgium

Belgian Luxembourg Council of Retail and Shopping Centers

What is closed and since when? Which retailers can still operate?

Bars & restaurants closed since 14th of March, all shops closed since 18th of March except food and pharmacy.

What governmental support is provided to retailers in your country?

Companies that have to close their shops can bring their employees in system of unemployment and government pay them €1500 /month (gross income, before tax & social security) companies can get € 4000 per month when closed

What government support is provided to landlords?

Non.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

A 50% remission of the rent during lockdown period and extra delay for the payment of the other 50% was discussed with retailers association, but they don't agree. They want more.

Any agreements with banks?

Government made agreement with banks that oblige them to suspend payment of capital during this period some flexibility.



Switzerland

Swiss Council of Shopping Places

What is closed and since when? Which retailers can still operate?

Closed from 23.03.2020 to 19.04.2020:

- Shops and markets;
 - Restaurants;
 - Campsites;
 - Bars, discos, nightclubs and strip clubs;
 - Leisure and entertainment establishments; in particular museums, libraries, cinemas, concert halls, theatres, casinos, sports centres, fitness centres, swimming pools, spas, ski resorts, botanical gardens and zoos;
 - Businesses offering personal services involving physical contact, such as hairdressers, massage parlours, tattoo studios and cosmetic studios.
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- The ban does not apply to the following establishments and events:
 - Food stores and other shops selling articles for everyday use (e.g. kiosks and petrol station shops);
 - Takeaway establishments, staff canteens, meal delivery services and restaurants for hotel guests;
 - Pharmacies, drugstores and shops selling medical aids (e.g. eyeglasses and hearing aids);
 - Post offices and sub-post offices;
 - Sales points for telecommunications providers;
 - Banks;
 - Petrol stations.

What governmental support is provided to retailers in your country?

Non.

What government support is provided to landlords?

Non.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

Extension of the deadline in the case of rent arrears due by tenants. If as a result of measures taken by the Federal Council to combat the coronavirus a tenant falls into arrears with the payment of rent or accessory charges that are due for payment between 13 March 2020 and 31 May 2020, in derogation from Article 257d paragraph 1 of the Code of Obligations (CO)¹, the deadline set by the landlord for payment of the rent or accessory charges must amount to at least 90 days.

Any agreements with banks?

Non.



France

Conseil National des Centres Commerciaux

What is closed and since when? Which retailers can still operate?

All stores are closed since 15th of March except for:

- Food stores;
- Pharmacies;
- Tabacconist;
- Opticians;
- DIY and a few others.

To date, 80% of shopping centers are open with those stores trading.

What governmental support is provided to retailers in your country?

A special fund has been put in place to help SME. The companies which are eligible (basically less than 10 employees and annual sales less than 1 million) are granted postponements of rents/charges, taxes and bank credits.

What government support is provided to landlords?

Main support is that government claims that it won't interfere between landlords and tenants.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

Rents and charges of Q2 to be invoiced on a monthly basis + collection suspended for April.

Any agreements with banks?

Non.



Spain

Asociación Española de Centros y Parques Comerciales

What is closed and since when? Which retailers can still operate?

On March 15th, the Spanish government called for the state of alarm in the country, closing down all "none essential activity". The only stores that are allowed to open are:

- Retail establishments selling food, drinks, and essential products and goods;
- Pharmacies, doctors, opticians and stores selling orthopedic products or health products;
- Press and stationery;
- IT and telecommunications vendors;
- Pet food vendors;
- Online commerce;
- Launderettes;
- Food-delivery businesses;
- Activities needed to guarantee the power supply, companies related to petroleum and natural gas derivatives.

So far it has been announced that the state of alarm will last until April 26

What governmental support is provided to retailers in your country?

Nothing yet. Still waiting for some announced measures.

In general, the wide range of companies that have temporarily suspended their workers jobs using a mechanism of temporary layoffs known as ERTE (Temporary collective layoffs), where employees will have to be readmitted back in their jobs once the state of alarm and confinement measures end. Also, our government has set up a public guarantee scheme to ensure liquidity for struggling businesses authorizing a line of bank endorsements of up to 100.000 million euros. This line of bank endorsements guarantees loans to those companies that apply for it or those companies that already had a loan and are in need of refinancing their credit.

What government support is provided to landlords?

Same as above. No support for landlords yet.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

Since our council represents the interest of both, retailers and property owners, as well as management companies, service providers, consultants, etc., our council hasn't position itself in this matter as we understand it is part of a bilateral negotiation between landlords and tenants.

We, however, have asked our government for a series of measures that do include fiscal aids for both, landlord and tenants once the commercial activity is restored, even partially restored, but nothing for the period of closure.

Specifically we have asked for tax credit measures for tenants of up to 75% to help them pay the rent and expenses once they are allowed to reopen, and a reduction of all sorts of taxes equivalent to 50% of the rents and expenses paid by landlords during the period when the commercial activity is still not to its full potential or not the normal activity.

Any agreements with banks ?

None.



Germany

German Council of Shopping Places

What is closed and since when? Which retailers can still operate?

We have a lock down since March 16th restaurants, bars etc., retail with exception of:

- Grocery;
- Supermarkets;
- Open markets selling food (no flowers);
- Pharmacy, drugstores;
- DIY markets.

What governmental support is provided to retailers in your country?

We have a "corona law" which allows to postpone rent payment, for a certain time.

What government support is provided to landlords?

None.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

We just finalized a „Code of conduct“ for retailers, restaurant operators and landlords

Any agreements with banks?

None.



Netherlands

NRW (The Netherlands)

What is closed and since when? Which retailers can still operate?

Closed by government:

- Restaurants;
- Café's;
- all services which requires physical contact (hairdressers, nail studio's etc.)

What governmental support is provided to retailers in your country?

Not specific on retailers. Only support for enterpreneurs.

What government support is provided to landlords?

None.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

To negotiate tailormade solutions. And to do so - no legal letters until 20th of April. No rent until April 20, no obligation to open the shop, no promotion costs. After April 20 there has to be an agreement between tenant and landlord. Otherwise the government will step in with rules.

Any agreements with banks?

Working on it. Not specific on retail up till now. Only deal about no morgage payments for 3 month.

Other important information

We set up a call for action/coalition of te willing, together with all important retailerganisations AND real estate organizations. Initiative by NRW. This makes it extra clear you can only solve this by working together.



Austria

Austrian Council of Shopping Centers

What is closed and since when? Which retailers can still operate?

Shops opened today (14.04.2020) but not all. Closed till May 2nd are:

- Shops over 400m² (exemption convenience shops for daily needs and since today DIY-markets) à nobody knows why smaller shops are better than bigger ones
- Shops in Shopping Centers L (except shops for convenience goods)
- Gastronomy (till mid of May)

But there are restrictions for the shops they are allowed to open:

- You have to wear a mask
- Each 20m² of size one customer is allowed (so you are recommended to go alone in the shop)

Today you have to queue up if you want to enter a DIY market.

The government wants to open all shops (no gastronomy) on May 2nd, but if the Coronavirus raises, I think they will close all shops (except convenience stores) again.

What governmental support is provided to retailers in your country?

The retailers will be supported till 75 % of their loss in sales.

What government support is provided to landlords?

The retailers have to cover rents and operating costs to the landlords with their care package.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

The retailers have to cover rents and operating costs to the landlords with their care package.

Any agreements with banks?

The retailers have to apply the supported loan (care package) at their house bank.



Czech Republic

Czech Committee of Shopping Centres Association

What is closed and since when? Which retailers can still operate?

Since March 12, all stores are closed except:

- Food,
- Drogerie,
- Pharmacy,
- Florist,
- Banks

Car wash, haberdashery a bit later. Since April 9 also hobby markets.

What governmental support is provided to retailers in your country?

Exclusion of lease termination till year end for rent unpaid for period from March 12 till June 30. Postponement of loans principals installment for 3 or 6 month. Rental subsidy for 3 months being discussed with government - participation of all participants (government between 33% to 50%, landlords 30% and tenants). Kurzarbait concept for covering 80% of salaries costs for employees siting at home is approved.

What government support is provided to landlords?

Postponement of loan principal payments up to 6 month.

Rents? What solutions is recommended by your members ? Any solutions introduced already?

Delay of due date of payments for rents till June probably and wait for final solution with government and real impact of turnovers at the year end. Apart exceptions no discounts yet and no turnover rent unless contract expires.

Any agreements with banks?

See above.



**POLSKA RADA
CENTRÓW HANDLOWYCH**
POLISH COUNCIL
OF SHOPPING CENTRES

Contact

Polish Council of Shopping Centers

ul. Nowogrodzka 50
00-695 Warszawa
tel. +48 22 629 23 81
prch@prch.org.pl

Radosław Knap
General Director
rknap@prch.org.pl