Ecommerce Europe’s Second Survey on the Coronavirus

Online shops can still maintain their activity but more than half respondents report problems in supply chain in their countries

Ecommerce Europe conducted a new survey among its National E-commerce Association members covering the general situation per country and the overall effect of the Coronavirus outbreak on the e-commerce sector, with a specific focus on the status of logistics in the various states. The findings show that 93% of all respondents are in full or partial lockdown, meaning that citizens in those countries can only go out with some or very strict restrictions. However, in all cases, online shops are still allowed to maintain their activity. In more than half of the cases (60%), online shops experience problems in their supply chain. This could come from limitations in the import of problems from third countries, but also from general restrictions along the supply chain, for instance at production sites, leading to shortages of certain products.

For all respondents, the governments in their countries have approved or are in process of approving measures to finance (partial) unemployment. These measures range from up to 800€ per employee in Greece to 84% of net salary up to 5,300€ in France.

Although it was expected that the closure of non-essential brick-and-mortar shops in many countries would lead to an increased pressure on online shops, only 27% of the respondents indicate this to be the case. In these cases, shops that close their physical stores, make a shift towards selling online, leading to a pressure on fulfillment on marketplaces.

Ecommerce Europe members that responded to the survey indicated significant pressure on parcel delivery operators in their countries. The findings show that for 60% of the respondents, a small negative impact on parcel delivery can be identified and for 33% even a strong negative impact. This is largely due to the increased pressure on the delivery operators resulting in delays. For instance, in Spain, there even has been a lock down of the postal service, leaving them limited to universal postal services. Private couriers are deciding individually to stay open or not. By the decree of the lockdown, delivery is allowed, but it is not considered an essential service (at least not for non-essential products). In contrast, in Switzerland, parcel delivery and postal services are considered part of the critical infrastructure. The government there seems to maintain it to keep a minimum of normality in these times. There also appear to be no public concerns around the safety of delivery.

In terms of cross-border delivery, 86% of respondents state that parcel delivery operators are not restricting or are being restricted to deliver abroad. Those that indicate that there have been problems, mention that this is largely due to the lack of flight connections.

More than half (64%) of respondents indicated that when brick-and-mortar shops are not allowed to open in their country, they are offering alternative options to deliver products to their consumers. Out of these respondents, in 78% of the cases, those brick-and-mortar shops start selling online.

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1. A total of 15 National E-commerce Association members of Ecommerce Europe replied to this survey, covering 13 countries, due to the fact that there can be more than one association per country. The survey run from 24 to 27 March 2020.
E-commerce crucial to provide EU citizens with essential products

The e-commerce sector is vital during the current Coronavirus outbreak. With people increasingly being restricted to their homes, home deliveries allow people to minimize the risks to catch the virus. Online retailers provide citizens with essential products, it is therefore imperative to keep the borders open for cross-border product supplies and sales. Ecommerce Europe calls on the European Commission and Member States to ensure the free flow of goods and help delivery operators, online retailers, and in particular SMEs, to continue to carry out their essential function.

About the Ecommerce Europe survey

In the current crisis following the outbreak of the Coronavirus, information sharing is crucial. Countries can learn from the approach of others or prepare for more severe situations by taking precautions based on the lessons of other countries. Ecommerce Europe, being the European platform where many e-commerce actors come together, wants to facilitate the knowledge sharing. To achieve this, it is carrying out a weekly survey to gain insights into two aspects: first, the general situation in a country and the overall effect of the crisis on the e-commerce sector, and second, a specific topic that is chosen per week.
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<th>Country comparison</th>
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<td>AT</td>
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<td>CH</td>
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Legend:
- Country in lockdown
- Free movement of people
- Brick-and-mortar shops open
- Are they offering alternative options to deliver products to their consumers?
- Online shops active
- Are online shops required to have their employees working from home except when practically impossible?
- Do online shops experience problems in their supply chain?
- Did the government adopt measures to finance (partial) unemployment?
- What is the estimated impact of the Coronavirus on non-food online sales?
- Do online shops face pressure from trade unions to close or restrict their activities?
- Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?
- Is parcel delivery regarded by the government as an essential infrastructure at the moment?
- How does the situation affect parcel delivery?
- Are automated pick-up/drop-off points for parcels still allowed to operate?
- Did the government publish any guidelines on safe delivery of parcels to consumers?
- Did the government adopt measures to finance (partial) unemployment?
- Did the government adopt measures to finance (partial) unemployment?
- Is “cash on delivery” still allowed?

HR - Heavy restrictions
SR - Some restrictions
SEP - Yes, but only if they sell essential products (i.e. food, healthcare, etc.)
TBA - It is in the process of being approved
↑ - Increase in sales
↓ - Decrease in sales
X - Complete lack of sales
Yes - N - Yes, a normal level of pressure
Yes - S - Yes, a strong level of pressure
SNI - Strong negative impact
LNI - Little negative impact
NI - No impact
N/A - Information not available
N/A - Not applicable
Country Report

Austria

- Country in lockdown: Full
- Free movement of people: Yes, but with heavy restrictions
- Brick-and-mortar shops open: Yes, but only if they sell essential products (i.e. food, healthcare, etc.)
- Are online shops active: Yes
- Are online shops required to have their employees working from home except when practically impossible? Yes
- Do online shops experience problems in their supply chain? No but it is expected to happen soon
- What is the estimated impact of the Coronavirus on non-food online sales? Increase in sales
- Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down? Yes
- How does the situation affect parcel delivery? Little negative impact
- Did the government publish any guidelines on safe delivery of parcels to consumers? No
- Are they offering alternative options to deliver products to their consumers? Yes
- Did the government adopt measures to finance (partial) unemployment? Yes, 80-90% up to € 5,370
- Do online shops face pressure from trade unions to close or restrict their activities? No
- Is parcel delivery regarded by the government as an essential infrastructure at the moment? Yes
- Are automated pick-up/drop-off points for parcels still allowed to operate? Yes
- Are postal/parcel delivery operators restricting or being restricted to deliver abroad? No
- Is “cash on delivery” still allowed? Yes
Country in lockdown: Partial

Free movement of people: Yes, but with heavy restrictions

Brick-and-mortar shops open: Yes, but only if they sell essential products (i.e. food, healthcare, etc.)

Online shops active: Yes

Are online shops required to have their employees working from home except when practically impossible? Yes

Do online shops experience problems in their supply chain? No, but it is expected to happen soon

What is the estimated impact of the Coronavirus on non-food online sales? Increase in sales

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down? Yes - in terms of logistics

How does the situation affect parcel delivery? Little negative impact

Did the government publish any guidelines on safe delivery of parcels to consumers? Yes

Are they offering alternative options to deliver products to their consumers? Yes

Did the government adopt measures to finance (partial) unemployment? Yes, 70% - limited to €2,754.76

Do online shops face pressure from trade unions to close or restrict their activities? Strong level of pressure

Is parcel delivery regarded by the government as an essential infrastructure at the moment? Yes

Are automated pick-up/drop-off points for parcels still allowed to operate? Yes

Are postal/parcel delivery operators restricting or being restricted to deliver abroad? No

Is “cash on delivery” still allowed? No
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<td>Did the government adopt measures to finance (partial) unemployment?</td>
<td>Yes, 50% to 80% depending on the situation</td>
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Denmark

Country in lockdown
Partial

Free movement of people
Yes, but with some restrictions

Brick-and-mortar shops open
Yes

Online shops active
Yes

Are online shops required to have their employees working from home except when practically impossible?
No

Do online shops experience problems in their supply chain?
No

What is the estimated impact of the Coronavirus on non-food online sales?
Increase & decrease in sales

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?
No

How does the situation affect parcel delivery?
Little negative impact

Did the government publish any guidelines on safe delivery of parcels to consumers?
No

Are they offering alternative options to deliver products to their consumers?
Yes

Did the government adopt measures to finance (partial) unemployment?
Yes, 75% and up to € 3,000

Do online shops face pressure from trade unions to close or restrict their activities?
No

Is parcel delivery regarded by the government as an essential infrastructure at the moment?
No

Are automated pick-up/drop-off points for parcels still allowed to operate?
Yes

Are postal/parcel delivery operators restricting or being restricted to deliver abroad?
No

Is “cash on delivery” still allowed?
No
Country in lockdown
Full

Free movement of people
Yes, but with heavy restrictions

Brick-and-mortar shops open
Yes, but only if they sell essential products (i.e. food, healthcare, etc.)

Online shops active
Yes

Are online shops required to have their employees working from home except when practically impossible?
Yes

Do online shops experience problems in their supply chain?
Yes

What is the estimated impact of the Coronavirus on non-food online sales?
Decrease in sales

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?
No

How does the situation affect parcel delivery?
Strong negative impact

Did the government publish any guidelines on safe delivery of parcels to consumers?
Yes

Did the government adopt measures to finance (partial) unemployment?
Yes, 84% of net salary up to € 5,300

Are they offering alternative options to deliver products to their consumers?
Yes

Did the government adopt measures to finance (partial) unemployment?
Yes, 84% of net salary up to € 5,300

Are online shops face pressure from trade unions to close or restrict their activities?
Normal level of pressure

Do online shops face pressure from trade unions to close or restrict their activities?
Normal level of pressure

Is parcel delivery regarded by the government as an essential infrastructure at the moment?
Yes

Are automated pick-up/drop-off points for parcels still allowed to operate?
Yes

Are postal/parcel delivery operators restricting or being restricted to deliver abroad?
No

Is “cash on delivery” still allowed?
No
Country Report

Germany

Country in lockdown
Partial

Free movement of people
Yes, but with some restrictions

Brick-and-mortar shops open
Yes, but only if they sell essential products (i.e. food, healthcare, etc.)

Online shops active
Yes

Are online shops required to have their employees working from home except when practically impossible?
No

Do online shops experience problems in their supply chain?
Yes

What is the estimated impact of the Coronavirus on non-food online sales?
Increase, decrease & complete lack of sales

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?
No

How does the situation affect parcel delivery?
Strong negative impact

Did the government publish any guidelines on safe delivery of parcels to consumers?
No

Are they offering alternative options to deliver products to their consumers?
Yes

Did the government adopt measures to finance (partial) unemployment?
Yes, 50% - 65% depending on the situation

Do online shops face pressure from trade unions to close or restrict their activities?
Yes, a normal level of pressure

Is parcel delivery regarded by the government as an essential infrastructure at the moment?
Yes

Are automated pick-up/drop-off points for parcels still allowed to operate?
Yes

Are postal/parcel delivery operators restricting or being restricted to deliver abroad?
No

Is “cash on delivery” still allowed?
Yes
Country Report

Greece

- Country in lockdown: Full
- Free movement of people: Yes, but with heavy restrictions
- Brick-and-mortar shops open: Yes, but only if they sell essential products (i.e. food, healthcare, etc.)
- Online shops active: Yes
- Are online shops required to have their employees working from home except when practically impossible?: No
- Are online shops experiencing problems in their supply chain?: Yes
- What is the estimated impact of the Coronavirus on non-food online sales?: Decrease in sales
- Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?: Yes
- How does the situation affect parcel delivery?: Little negative impact
- Did the government publish any guidelines on safe delivery of parcels to consumers?: No
- Are they offering alternative options to deliver products to their consumers?: No
- Did the government adopt measures to finance (partial) unemployment?: Yes, up to €800 per employee
- Do online shops face pressure from trade unions to close or restrict their activities?: No
- Is parcel delivery regarded by the government as an essential infrastructure at the moment?: Yes
- Are automated pick-up/drop-off points for parcels still allowed to operate?: Yes
- Are postal/parcel delivery operators restricting or being restricted to deliver abroad?: No
- Is “cash on delivery” still allowed?: Yes
Country in lockdown: Full

Free movement of people: Yes, but with heavy restrictions

Brick-and-mortar shops open: Yes, but only if they sell essential products (i.e. food, healthcare, etc.)

Online shops active: Yes

Are online shops required to have their employees working from home except when practically impossible? Yes

Do online shops experience problems in their supply chain? No but it is expected to happen soon

What is the estimated impact of the Coronavirus on non-food online sales? Decrease in sales

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down? No

How does the situation affect parcel delivery? Strong negative impact

Did the government publish any guidelines on safe delivery of parcels to consumers? Yes

Did they offer alternative options to deliver products to their consumers? Yes

Did the government adopt measures to finance (partial) unemployment? Yes

Do online shops face pressure from trade unions to close or restrict their activities? No

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down? No

Is parcel delivery regarded by the government as an essential infrastructure at the moment? Yes

Are automated pick-up/drop-off points for parcels still allowed to operate? No

Are postal/parcel delivery operators restricting or being restricted to deliver abroad? No

Is “cash on delivery” still allowed? No
**Country in lockdown**
Partial

**Free movement of people**
Yes, but with some restrictions

**Brick-and-mortar shops open**
Yes

**Online shops active**
Yes

**Are online shops required to have their employees working from home except when practically impossible?**
Yes

**Do online shops experience problems in their supply chain?**
Yes

**What is the estimated impact of the Coronavirus on non-food online sales?**
Increase, decrease & complete lack of sales

**Did the government adopt measures to finance (partial) unemployment?**
Yes, up to 90% for company workers
Up to €1,000/month for indep. workers

**Do online shops face pressure from trade unions to close or restrict their activities?**
No

**Is parcel delivery regarded by the government as an essential infrastructure at the moment?**
Yes

**Are automated pick-up/drop-off points for parcels still allowed to operate?**
Yes

**Are postal/parcel delivery operators restricting or being restricted to deliver abroad?**
No

**Did the government publish any guidelines on safe delivery of parcels to consumers?**
No

**Are they offering alternative options to deliver products to their consumers?**
N/A

**Is “cash on delivery” still allowed?**
No
Country Report

### Norway

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<td>Yes, the government covers costs of lay-offs to both employers and employees</td>
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Spain

Country in lockdown: Partial

Free movement of people: Yes, but with heavy restrictions

Brick-and-mortar shops open: Yes, but only if they sell essential products (i.e. food, healthcare, etc.)

Online shops active: Yes

Are online shops required to have their employees working from home except when practically impossible? Yes

Do online shops experience problems in their supply chain? Yes

What is the estimated impact of the Coronavirus on non-food online sales? Increase in sales

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down? No

How does the situation affect parcel delivery? Little negative impact

Did the government publish any guidelines on safe delivery of parcels to consumers? Yes

Are they offering alternative options to deliver products to their consumers? Yes

Did the government adopt measures to finance (partial) unemployment? It is in the process of being approved

Do online shops face pressure from trade unions to close or restrict their activities? Normal level of pressure

Is parcel delivery regarded by the government as an essential infrastructure at the moment? Yes

Are automated pick-up/drop-off points for parcels still allowed to operate? Only for essential goods

Are postal/parcel delivery operators restricting or being restricted to deliver abroad? N/A

Is “cash on delivery” still allowed? Yes
Country Report

Sweden

Country in lockdown
Partial

Free movement of people
Yes, but with some restrictions

Brick-and-mortar shops open
Yes

Online shops active
Yes

Are online shops required to have their employees working from home except when practically impossible?
No

Do online shops experience problems in their supply chain?
Yes

What is the estimated impact of the Coronavirus on non-food online sales?
Increase, decrease & complete lack of sales

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?
Yes

How does the situation affect parcel delivery?
Strong negative impact

Are online shops required to have their employees working from home except when practically impossible?
No

Do online shops face pressure from trade unions to close or restrict their activities?
No

Did the government adopt measures to finance (partial) unemployment?
It is in the process of being approved

Do online shops experience problems in their supply chain?
Yes

Are they offering alternative options to deliver products to their consumers?
Yes

Did the government publish any guidelines on safe delivery of parcels to consumers?
No

What is the estimated impact of the Coronavirus on non-food online sales?
Increase, decrease & complete lack of sales

Is parcel delivery regarded by the government as an essential infrastructure at the moment?
Yes

Are automated pick-up/drop-off points for parcels still allowed to operate?
Yes

Are postal/parcel delivery operators restricting or being restricted to deliver abroad?
No

Is "cash on delivery" still allowed?
N/A
Country in lockdown: Partial

Free movement of people: Yes, but with some restrictions

Brick-and-mortar shops open: Yes, but only if they sell essential products (i.e. food, healthcare, etc.)

Online shops active: Yes

Are online shops required to have their employees working from home except when practically impossible? No

Do online shops experience problems in their supply chain? Yes

What is the estimated impact of the Coronavirus on non-food online sales? Increase & decrease in sales

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down? No

How does the situation affect parcel delivery? No to little negative impact

Did the government publish any guidelines on safe delivery of parcels to consumers? No

Are online shops required to have their employees working from home except when practically impossible? No

Are online shops experience problems in their supply chain? Yes

Did the government adopt measures to finance (partial) unemployment? Yes, up to 80%

Do online shops face pressure from trade unions to close or restrict their activities? No

Is parcel delivery regarded by the government as an essential infrastructure at the moment? Yes

Are automated pick-up/drop-off points for parcels still allowed to operate? Yes

Are postal/parcel delivery operators restricting or being restricted to deliver abroad? No

Is “cash on delivery” still allowed? Yes
Overview of survey results
Survey results

Is your country in lockdown?
Number of responses: 15

- Yes, partial lockdown: 9 (60%)
- Yes, full lockdown: 5 (33.33%)
- No: 1 (6.67%)
Are people in your country allowed to go out?
Number of responses: 15

- Yes: 1 (6.67%)
- Yes, but with some restrictions: 7 (46.67%)
- Yes, but with heavy restrictions (i.e. stay close to their home, for limited time, only to buy food, medicines, go to work): 7 (46.67%)
- No: 0 (0%)

Are brick-and-mortar shops still allowed to be open?
Number of responses: 15

- Yes: 4 (26.67%)
- Yes, but only if they sell essential products (i.e. food, healthcare, etc.): 11 (73.33%)
- No: 0 (0%)
Are online shops still allowed to maintain their activity?
Number of responses: 15

Yes: 15x chosen (100%)

Are online shops required to have their employees working from home except when practically impossible?
Number of responses: 15

Yes: 7 (46.67%)
No: 8 (53.33%)
Do online shops in your country experience problems in their supply chain:

Number of responses: 15

- Yes: 9 (60%)
- No: 1 (6.67%)
- No but it is expected to happen soon: 5 (33.33%)

Did your government adopt measures to finance (partial) unemployment?

Number of responses: 15

- Yes: 13 (86.67%)
- It is in the process of being approved: 2 (13.33%)
- No: 0 (0%)

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Text answers:

In the past few weeks we have had no evidence that the supply chain has been fully operational. However, it is necessary to consider that the health emergency is emerging now in the other European and non-EU countries, it is necessary to verify the impacts of the restrictions in those countries. Supply chains are slower in general due to restrictions all along the chain of value, so there is some sort of shortage (depending on the product). Also, when it comes to couriers, security distance may not be guaranteed when two people need to share a vehicle. The delivery itself is safe when the product is left on the floor and security distance can be guaranteed. If it's a bigger product that needs two people or assembling, inside homes where space may not be as wide, there might be some problems.

Logistical problems, where parcel deliveries work at max capacity.

It is not permitted to travel from and to the Czech Republic now. The expectations are quite hard in business and social life to. The borders can be closed from six months to one or more years. The online shops are still working without any limits (only the health requests are higher), however about 40% of shops' turnovers are decreased in important amounts now.

out of stock problems: high traffic in logistics handling.

Did your government adopt measures to finance (partial) unemployment?

- Yes: It is in the process of being approved
- No: 

What is the percentage of income paid by the government and up to which amount?

- 75% - up to 3,000 euro
- 70% - limited to 2,754.76 EUR
- Up to 90% of income for those who work for companies asking for help
- Up to a max 1000 euro's per month for independent workers
- The government covers costs of layoffs to both employers and employees
- We have short-time work with 60% of income from the last 12 month (average)

Employee in a quarantine = 60% of the salary covered by the government completely.

Employee of an closed company due to an ordered closure or restriction of operation as a result of government-ordered crisis measures will = 100% of the salary. The government will pay 80% of their wage costs to employers.

Employee who has been prevented from working due to restrictions on the availability of inputs necessary for the company's activity will receive 80% of the salary and the state will pay 50% of the salary paid to employers.
What is the estimated impact of the Coronavirus on non-food online sales in your country (more answers possible)?

Number of responses: 15

- Decrease in sales: 11 (73.33%)
- Complete lack of sales: 3 (20%)
- Prohibition of sale of non-essential products: 0 (0%)
- Increase in sales: 10 (66.67%)

Do online shops suffer from the pressure of brick-and-mortar shops that were required to shut down?

Number of responses: 15

- Yes: 4 (26.67%)
- No: 11 (73.33%)
- Not applicable to my country: 0 (0%)
Logistic pressure. Most online shops, except for travel & leisure, increase in online sales. That does not compensate the closing of the brick-and-mortar shop. But fulfillment and handling are under pressure.

Not really, as most shops who close do this voluntarily.

a lot of brick-and-mortar-stores open their own online shops and sell their products online.

There was a marketplace launched for small BnM shops that have no online shop:

https://gemeinsam-einsam.ch/

Not so far. Also because shops are using online

Is parcel delivery regarded by the government as an essential infrastructure in your country at the moment?

Number of responses: 15

Yes

13 (86.67%)

No

2 (13.33%)

How does the situation affect parcel delivery?

Number of responses: 15

There is no impact

1 (6.67%)

There is little negative impact

9 (60%)

There is a strong negative impact

5 (33.33%)

There is a very strong negative impact

0 (0%)

Please elaborate:

Number of responses: 11

Text answers:

Delivery of parcels and logistics services, in general, are strongly impacted. On the one hand there has been a strong increase in demand (more than double in a few weeks) and on the other hand companies are working in less than optimal conditions, companies are committed to guaranteeing the protection of workers.

For the Postal Service, there has been a lockdown, and they are now limited to universal postal services. Private couriers are deciding individually to stay open or not. Delivery is allowed by the Decree of the lockdown, but it's not regarded as an essential service, although it is regarded as instrumental to other essentials (such as food delivery).

Big pressure, delay using delivery (social distance) - signage of package by postman - slower delivery times.

Delays in delivery can run up to 3-5 days depending on sector.

the parcel delivery is very asked and are working overload because the customers are selling online. Many truck drivers from abroad are cancelled, so there are not enough employees. the border controls burden the employees and lead to longer delivery times.
If brick-and-mortar shops are not allowed to open in your country, are they offering alternative options to deliver products to their consumers?

Number of responses: 14

Yes: 9 (64.29%)
No: 5 (35.71%)

Please select:

Number of responses: 9

- Crowd delivery (people offering to collect and deliver products for instance to elderly who cannot go out): 5 (55.56%)
- Start selling via online platforms: 7 (77.78%)
- Other: 2 (22.22%)
Are postal/parcel delivery operators restricting or being restricted to deliver from your country to abroad?

Number of responses: 14

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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<td>2</td>
<td>12</td>
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(2 (14.29%), 12 (85.71%))

Please elaborate:

Number of responses: 3

Text answers:

- We have no evidence of this issues
- Some parcel points have been shut down but not all as half of pick up points are still open.
- Restrictions for deliveries abroad are mainly due to the lack of flight connections. This is especially the case for parcels sent with national postal services.
- There was no guideline to stop those deliveries.