The consequences of the Covid-19 pandemic on the music sector
France, Germany, the Netherlands, Finland, Spain, Italy, United Kingdom,
United States, Canada, Costa Rica, Argentina, Brazil, Japan, Indonesia, Kenya, Zimbabwe

1. Assessment of government restrictions imposed on the music sector

The first sector to have suffered from government restrictions, the performing arts will also be the last to resume normal activity. In most countries, all music sectors are affected (production, concerts, performances, distribution, exploitation, audiovisual, broadcasting). Only streaming can maintain a certain level of activity.

In France, after rough handling due to the “yoyo” effect of the health protocol (half-capacity seating, earlier times due to the curfew), show venues finally had to close on 30 October last. The only things to be maintained are recordings, rehearsals and streaming sessions live in the studios and auditoriums, but concerts with audiences are proscribed.

In Germany, all shows were stopped last April. Concerning opera houses and major theatres depending on cities or Länder, there was a slight resumption in September and October (with a maximum of 37 musicians on stage and an audience quota which was limited to 500 people in auditoriums offering up to 1,500 seats).

In the end, it was decided to close all performance venues in November. Radio orchestras continue to operate normally for studio recordings, with a reduced number of musicians. However, the situation remains disparate in the country due to the autonomy of the Länder; for example, in the region of Frankfurt, neither rehearsals nor shows are authorised until Easter.

The Netherlands is currently in semi-lockdown with a curfew from 9 pm to 4.30 am, extended until 2 March. Concert venues have been closed since 4 November, and only recordings for broadcasting concerts in streaming, without audiences, are authorised.

From September to 4 November, orchestras operated with a limited number of musicians (30) and maximum audiences of 30 in the auditorium. The model consisted of two 1-hour concerts, performed one after the other in the same evening. Musicians were, of course, delighted to be able to play but reported that these concerts were often much longer than scheduled. For freelance workers, the question arose about whether they were to be paid for one or two concerts. Many musicians indicated the existence of additional stress linked to this doubling of concerts.

While in Finland, the health crisis was to begin with well-controlled (society with more or less normal activity, concerts authorised with reduced capacity), all cultural establishments, performance venues and theatres were finally forced to close as from December 2020.

Spain is the country where restrictions imposed on the cultural sector are currently the lightest. They do, however, differ from one Autonomous Community to another (17 CCAAs). Generally speaking, there is a curfew from midnight to 6 am, but times and the level of restrictions vary. For example, bars, restaurants, concert halls and theatres are open in Madrid, while in Barcelona and most CCAAs, cultural establishments are closed and being outside is only allowed for 2 hours in the morning and 2 hours in the afternoon, which is incompatible with performances at the end of the day.

In Madrid (the Spanish National Orchestra), a formula consisting of two concerts lasting 1¼ hours without an interval per evening has been implemented, making it possible to maintain artistic activity. The number of musicians on stage and the size of audiences are reduced by 25%.

In Italy, all cultural institutions, theatres and opera houses are closed, and no artistic activity (recordings, broadcasting) takes place inside premises.

In the United Kingdom, after a tenuous re-opening of cultural venues for the summer season (physical distancing, 30% of usual ticket revenues), today, a mechanism similar to that of the French version seems to be taking shape
with professional recordings, rehearsals and broadcasting being allowed in studios, cinemas, concert halls and outside. Bars, pubs and restaurants are only open for takeaway, and live music is not permitted.

The **United States** is undergoing restrictions that vary from State to State. Generally speaking, as it is not possible to programme concerts hosting members of the public, only recordings and streaming sessions are authorised. In some States, performances with a capacity of 100 people (in venues with a 1,000-seating capacity) were able to take place a few months ago, before the number of Covid-19 cases became too high. On stage, the number of musicians allowed was between 30 and 40, but bringing together musicians to rehearse or record is becoming increasingly complicated, if not impossible.

In **Canada**, the health crisis has worsened, particularly in the provinces of British Columbia, Ontario, Alberta and Quebec. The country is experiencing a devastating situation where the music sector is concerned: all cultural venues are closed, and professional recordings are generally in the form of home studio streaming, except for some provinces where artists can play on stage with a maximum limit of 10.

In **Costa Rica**, health restrictions have been introduced gradually, going from closure of cultural establishments to cancellation of all artistic events, then the imposition of a curfew across the country, with constraints slightly different depending on the township. Orchestra musicians are allowed to rehearse for online broadcasts, with the exception of wind instruments.

In **Argentina**, generally speaking, there is a curfew, but the activity level varies from one region to the next: some provinces are operating almost normally, while others are entirely shut down. Most musicians are not working at all or only on a part-time basis. In the Cordoba region, the authorized maximum size for audiences is around 50% of normal, but goes down to 30% in other provinces. Most cultural establishments are closed. Some remain partially open, with a capacity of 500 to 1,000 people.

In **Brazil**, theatres, bars and other show venues are closed. National and international artistic events are either postponed or cancelled, including the Rio Carnival, representing a significant economic loss for the country.

In **Japan**, the government declared a state of emergency on 8 January, following a significant increase in the number of people infected at the end of 2020. Going out of doors is now limited, and restaurants have to close at 8 pm, limiting the possibility of putting on concerts or performances for the public.

At the end of January, there are only 300 cases of Covid-19 per 100,000 inhabitants, but following the detection of 700 new cases in Tokyo, some concerts have had to be postponed or cancelled.

Concert halls and theatres are generally open, but certain establishments have been closed by local government decisions. Concert halls are subject to a capacity of less than 50% of seating capacity.

In **Indonesia**, the music sector has been in crisis since March 2020. All cultural establishments are closed, and only a few sound recordings are authorised with a maximum of 4 musicians. The government encourages collaboration between artists and artistic disciplines on digital platforms.

**Kenya** is currently in semi-lockdown with a curfew from 10 pm to 4 am. Clubs and cultural establishments are closed, and the rare performances only occur during the weekend, which drastically reduces job opportunities in the sector.

In **Zimbabwe**, the situation is more than catastrophic for the music sector: no activity that involves artists’ physical presence is allowed, and online activity is minimal since only a tiny number of musicians have access to streaming platforms.

**A digital turning-point that is scarcely viable over the long term**

In these countries, the pandemic has forced most musicians and music institutions to abandon events hosting the public in favour of streaming concerts on digital platforms. Recordings and broadcasting are gradually growing (Zoom, YouTube, Instagram live, etc.), particularly for the leading symphony orchestras that propose online ticket sales, but this is far from being the rule. Having recourse to digital platforms raises numerous concerns, including remuneration for musicians, inequalities between artists as a result of the digital divide, access costs to recording studios and the uncertain viability of the model, which has not proved to be of interest to the public, while requiring significant production means.
2. Government and union support measures accessible to musicians

"We constantly hear about professionals in the tourist trade, restaurants and airline companies. All these people have benefitted from support funds. Significant funds. And the music sector is being left to die..." Horace Trubridge, MU General Secretary (United Kingdom).

The music sector uses different forms of contracts, from salaried status to atypical forms of employment (self-employed musicians, freelancers...). Government aid set up during the health crisis is generally ill-adapted or even inaccessible to professionals who come under these precarious forms of employment. Moreover, most of this financial support is directly earmarked for institutions, not for the artists they employ and even less for musicians referred to as self-employed.

In France, on 29 October 2020, Minister of Culture Roselyne Bachelot said: "artistic creation can continue to live" by encouraging, for the music sector, work to continue for preparing shows and performances without any public. In reality, only public service institutions succeed, as best they can, to carry out this recommendation, leaving the whole part of the sector represented by self-employed musicians on the sidelines. For its part, SNAM-CGT is asking for a guarantee fund to be set up or a job support mechanism that will enable the resumption and financing of rehearsals, residencies and recordings, to make it possible for all artists to start work again, regardless of the form in which they operate.

Even if the compensation scheme for intermittence in the performing arts has, up to now, made it possible to limit the damage, the hundreds of millions of euros of the contingency, back-up or recovery plans implemented by the State (133 million euros), the National Music Centre (180 million euros) or certain territorial authorities have only been allocated to companies. SNAM-CGT is requesting additional aid to be deployed for performers.

Also, the question of the eligibility of casual musicians to partial unemployment schemes is left in the air: to date, the State has not taken any measure to enable employers whose shows have been cancelled to pay partial activity compensations to the artists and technicians concerned, even though this benefit has been opened to more than 8 million employees in France.

In Germany, a platform of donations has been set up by the DOV union. Some €4M of donations have thus been collected and distributed to self-employed musicians, whether or not they are union members.

Government aid likely to benefit freelancers is not efficient (unlike in France, there is no dedicated unemployment insurance scheme for this category of workers), but the government has promised to set up a financial support system based on tax returns for the previous year.

In the Netherlands, government aid exists for the culture sector but is exclusively earmarked for institutions, not for musicians, and even less for freelancers. A temporary transitional scheme has been set up for self-employed workers affected by Covid-19: TOZO (approximately 1,000 euros per month per person). Eligibility criteria for this stimulus fund take into account, however, the income of the spouse or partner of the worker in question. Besides, it does not specifically target the culture sector but is intended for all self-employed workers. Since many musicians are not registered with the Chamber of Commerce as self-employed workers, approximately 33% of them do not have access to this temporary form of assistance.

In Finland, the Ministry of Culture has allocated 70 million euros to back up the cultural sector. Many members of the Finnish Musicians' Union (SML) have benefited from this fund and other forms of help from foundations in the music and culture sectors.

The union has received a 72,000 euros grant for a study project associating sector employers on the various ways of re-adjusting live performance formats (in reaction to the pandemic and to take into account the environmental challenge) but also to evaluate the viability of the online format for the music sector.

All Finnish labour has access to unemployment benefits of up to 750 euros a month or 60% of previous income (provided the person belongs to an unemployment fund). However, more than half of self-employed musicians have not benefitted from this (about 1,500 freelancers out of 2,500 who are SML members).

SML has allocated two series of financial help programmes to performers via the union's mobile application. In June, 500,000 euros were distributed, and, in October-November, an additional 200,000 euros set aside for members were distributed. These awards were from 1,000 or 500 euros each, in addition to the possible basic income (rare). Subsidies from Gramex Finland financed this support.
In **Spain**, from March 2020, municipalities have done away with their subsidies to culture and redirected them to social and health services. The 140 billion euros of public funds, including 72,700 million of direct aid received from the European Union have, since September, made it possible for a certain number of concerts to resume in municipal venues for self-employed musicians.

On 5 May 2020, a draft bill for government aid for all self-employed workers was adopted, but only musicians under contract and who did not receive unemployment benefit were eligible.

In **Italy**, a compensation of 600 euros per musician was allocated from March 2020 (**Decreto Cura Italia**), accessible to all workers registered with the **Pension Fund for workers in the entertainment sector**, who were not pension-holders (conditions: payment of at least 30 days of contributions in 2019, with an income ceiling of 50,000 euros). The compensation was paid by INPS, on request, within the total limit of 48.6 million euros. These compensations were then raised to 1,000 euros (**Decreto Rilancio** in May and **Decreto Ristori** in October). Still, many musicians were unable to benefit from it since they could not justify having any contract.

A contingency fund of 20 million euros was set up under the **Cura Italia decree** (**Fondo emergenze spettacolo, cinema e audiovisivo**) to support actors, singers, dancers, musicians, backing singers and circus artists registered under the **Pension Fund for workers in the entertainment sector** and having contracts with cultural and artistic institutions (financial help for the period from 23 February 2020 to 31 December 2020).

The **Cassa integrazione guadagni** (a social buffer) is accessible to all Italian workers across all sectors who are temporarily unable to work. This compensation covers all workers able to justify a minimum of 90 days of work, is applicable for a maximum period of 9 weeks and is equal to 80% of undrawn salary.

Several requests submitted to the government are currently under discussion, particularly the change of criterion for allocating aid, which would no longer be exclusively based on the number of days of contributions, but on mixed criteria that would also take into account the musician's income.

In the **United Kingdom**, 1.57 billion pounds have been mobilised by the government to support artistic industries. On 5 July 2020, the **Cultural Recovery Fund** (£500M) was announced. It is intended for institutions and organisations dedicated to the arts, culture and heritage (with a bracket from £500,000 to £3M per organisation), but no financial aid is directly accessible to performers in England, unlike in Scotland, Wales and Northern Ireland.

The SEISS mechanism (**Self-Employed Income Support Scheme**) has been set up. Help covers 80% of the average income for self-employed workers during the past three years. This help is subject to specific allocation criteria, of which the obligation to produce an income tax return statement for 2018-2019, which consequently only takes into account declared work, including for street musicians (**busking**). A financing project accessible to artists (on registration) has been drawn up by the **Arts Council England**, but very few musicians have benefited from it, as demand outstrips supply. The musicians’ union (**MU Coronavirus Hardship Fund**) has created a contingency fund, offering £200 per musician and six months free union membership.

Other subsidies or material support for musicians have also been forthcoming via **Help Musicians UK**, the **Royal Society of Musicians or British Assistance for Performing Arts Medicine** (**BAPAM**), in limited proportions.

In the **United States**, the use of digital media is governed by the **Integrated Media Agreement** (**IMA**) for all symphony orchestras. As early as March 2020, the symphonic branch of AFM (**Symphonic Services Division** or **SSD**) negotiated an amendment to the IMA with the **Employers Electronic Media Association** (**EMA**) for the agreement to be extended to streaming and for musicians to be able to continue to receive their usual wage when they accept live broadcast of recordings or archives. This agreement guarantees 30 days of musicians’ salaries when a recording is placed online on a digital platform.

Another amendment was made to IMA at the initiative of AFM, to encourage orchestras to maintain musicians’ wages during the health crisis: the more orchestras pay their salaries, the more free streaming time they receive each month (4 wage scales: 75 to 100%, 60 to 75%, 30 to 60% and 15 to 30%). As a result of this scheme, most leading symphony orchestras have continued to pay their musicians at least 60% of their wages.

Payment of unemployment benefits across all sectors comes under the authority of each State. The benefit was 600 USD per week up to the end of 2020. Then it went down to 300 USD per week. However, the benefit of this help is limited to a total of 26 weeks and requires that the person justify a certain number of hours of work under contract. In light of these constraints, many musicians have been unable to benefit from this support.
No specific aid has been set up for artists. AFM has created a solidarity fund for freelance musicians but has only been able to offer modest amounts.

In Canada, the union has played a critical role. It enabled the music sector to receive aid from the outset of the pandemic.

The field of the Music Performance Trust Fund has been extended to streaming. Initially designed to offer compensation to musicians whose contracts were cancelled, this fund now covers communication to the public of free concerts and shows. It meets 30% to 50% of musicians’ fees, subject to respecting minimum standards. However, few musicians have been able to access this remuneration: difficulties in having access to recording studios, suitable digital equipment, streaming platforms…

The Canadian Emergency Relief Benefit (CERB) provides financial support of 2,000 CAD for four weeks to employees and self-employed workers affected by Covid-19. Initially, this help was incompatible with receiving any other income, but following the lobbying of Canadian unions, it is now possible to benefit from it provided the total of the replacement income is not more than 2,000 CAD per month.

Administered by the Canada Revenue Agency up to June 2020, the Canadian Recovery Benefit (CRB) makes it possible to obtain 897 CAD every two weeks. Re-registration is mandatory every fortnight for a total of 13 eligible periods, i.e. 26 weeks between 27 September 2020 and 25 September 2021. Many musicians have been unable to benefit from this additional aid because of the atypical form of their employment.

The period of union affiliation has, moreover, been extended without penalties for all members.

In Costa Rica, the Programa Proteger provides temporary financial support to workers affected by Covid-19, across all sectors for three months. The amount of help is €84.88 per month for those working part-time at 50% or less. Those who have been dismissed or whose contract has been suspended, self-employed workers affected, and people whose activity has been reduced by 50% or more are entitled to €169.76 a month. There is no dedicated help for musicians.

In Argentina, significant State support was allocated
- to self-employed workers up to December 2020: monthly help of approximately 50% of the basic minimum wage thus benefits 12 million workers;
- to employers: assistance covers 50% of each employee’s wages, creating an incentive to honour contracts.

From March to May 2020, musicians under contract were able to continue receiving their full salary.

Government measures targeting culture have been implemented since November 2020: a guarantee of minimum and average wages for those working in the cultural sector (approximately 35,000 workers, from technicians to actors, across the whole country).

Compensations are paid by provincial administrations: subsidies equal to the minimum wage for 1,000 musicians.

Government-funded food aid is distributed in some provinces following a union initiative (for example, in Buenos Aires, between 9,000 and 12,000 tonnes of food have been recovered and redistributed to musicians in need).

In Brazil, government aid is offered to workers affected by Covid-19 across all sectors, but amounts are very low. Financial support dedicated to the cultural sector has been set up (the Aldir Blanc Act). Certain public or private enterprises have offered financial help for online artistic projects.

In Japan, there are (very low) municipal subsidies for self-employed musicians broadcasting performances online.

In April 2020, the government gave help to the tune of one million yen (approximately 8,000 euros) to all workers who had lost more than 50% of their salaried income.

The Cultural Affairs Agency provides temporary help to professional artists and groups to enable them to continue their activities, subject to presenting elements that testify to their professional activity.

Social security benefits have been extended up to February 2021 for all self-employed workers.

Music companies employing musicians under employment contracts receive a government subsidy for adjustment to work up to March or April 2021.
In Indonesia, temporary government help is paid to workers who receive no salary, up to 25% of previous income. The FeSMI union receives a few private companies’ donations, which enables it to distribute 100 to 200 Indonesian dollars a month to each union member. Solidarity concerts are organised with the help of sponsors. Receipts are redistributed to musicians.

In Kenya, a symbolic fund of 100 million shillings (approximately 750,000 euros) has been allocated by the government to the Ministry of Culture to be divided between all cultural players (dancers, musicians, actors…). To benefit, artists must register and place a video or a recording online testifying their artistic activity. This one-off measure was taken approximately six months after the beginning of the pandemic and represented around 5,000 shillings per person (€50 to €100). Very few musicians have benefitted from this, particularly the discrepancy between the low amount offered and the paperwork necessary to be entitled.

In 2020, the union received food rations from companies. They were redistributed to all members, making it possible for some musicians to eat for at least one or two months. For the moment, this operation cannot be renewed on account of difficulties encountered by the food companies.

In Zimbabwe, a government fund Athletes and Arts Relief Fund (AARF) of 20 million Zimbabwean dollars (55,000 USD) has been released to help artists and athletes whose activities and incomes have been affected by the Covid-19 pandemic. The artists support fund is distributed via the National Arts Council of Zimbabwe (NACZ). To benefit from this, artists have to testify to activity that has been ongoing for the past two years. Help can be up to 5,000 Zimbabwean dollars (13.8 USD). Artists’ associations and social organisations registered with the National Arts Council or the Fine Arts’ Museum of Zimbabwe can obtain up to 7,500 Zimbabwean dollars (20.7 USD). Less than 100 musicians have had access to this additional help. The union denounces a lack of transparency on the part of the government.

The union has used all its resources to purchase first-aid packs and food to help those in the most precarious situations (some 300 musicians in all).

3. State of the sector in terms of employment and income and situation of musicians’ unions

Since March 2020, the music sector has been in a deplorable state, regardless of which countries: cancellation of contracts before being signed, total abandonment of newcomers and young artists, funding undermined making it impossible to carry out any artistic activity or practices, or correctly preparing for a return to a post-Covid world…

While musicians employed by the State or local authorities undergo practically no loss of salaries in countries like Germany, Canada, Costa Rica, Spain, France or the Netherlands, most freelance musicians find themselves without any jobs or concrete aid. They are often forced to seek a second job or accept retraining: warehouses, selling fruit and vegetables, car-washing, entrepreneurship… The summer of 2020 was particularly devastating: most self-employed musicians live for a large part of their income from summer activities. This year, all freelance musicians are thought to have earned in one month what they generally do in one week of work.

Contributions paid to musicians' unions are on the decline, which is considerably affecting their resources. Appeals for solidarity have been launched. More than ever, it is essential to pull together and have governments listen to artists' voice.

France

A survey carried out at the beginning of October by SNAM (900 replies) paints a catastrophic picture:
- One musician in two had less than 14 fees paid or scheduled between March 2020 and February 2021 (as against 53 normally);
- 91% of contracts cancelled have received no compensation at all;
- 56% of musicians doubt that it will be possible to extend their entitlement to unemployment benefits beyond August 2021. 26% think that it will be impossible;
- Between March 2020 and February 2021, the number of fees paid or scheduled dropped by 68% in comparison to the previous year;
– 41% of musicians who do not have ancillary activity no longer fulfil the conditions for opening rights for sick or maternity leave. This figure would be 54.5% if they carried out a contract in November since this would offset the reference period.

Finland

The global employment level is estimated to be 20% of the 2019 level. The losses undergone by self-employed musicians are approximately 80 million euros for 2020. A few orchestras have temporarily suspended employment contracts, but losses for musicians from these orchestras have been relatively low.

The United Kingdom

– 38% of musicians have not been able to benefit from government support or have only benefitted partially.
– 47% of musicians have been forced to look for work outside the music sector.
– 70% are unable to carry out more than one-quarter of their usual work.
– 36% of musicians currently have no professional activity.
– 87% of musicians earned less than £20,000 in 2020, well below the average income of £29,600 in the United Kingdom.
– The collective sector loss is over 20 million pounds.

The United States

Some orchestras no longer have any activity and are not paying their musicians at all or very little: e.g., the Nashville Orchestra musicians only receive 300 USD per week.

50% of self-employed musicians receive no salary.

Some orchestras have dismissed all their musicians.

Canada

Cultural institutions and leading orchestras face a deficit of 25% due to the absence of ticket sales. A survey carried out in November 2020 by AFM shows that in Montreal, 20% of union members thought of leaving the music industry for occupational retraining.

Costa Rica

The 2021 budget of the Ministry of Culture has been reduced by approximately €2M, which considerably affects the possibilities for relaunching the economy and weakens the whole chain of creation in the music and cinema sectors.

On 25 June 2020, the Estrategia Nacional Costa Rica Creativa y Cultural 2020-2030 was launched to identify, by "sectoral tables", the needs and solutions to relaunch each sector in the short and medium terms. The UTM union is taking part in the sectoral table on music.

Artists’ committees have been set up to present proposals to the government, but it is not foreseen that there will be any significant evolution and legislative reforms are very slow.

Argentina

Attempts to dissolve the orchestras of José C. Paz and the Pilar symphony orchestra were thwarted due to public mobilisation and union pressure.

The resources of SADEM have fallen by 50% in comparison to 2019, but government aid has enabled the union to survive.

SADEM plays an essential role in discussing protocols at the national level for online music performances, safeguarding cultural establishments, controlling restrictions and contracts, supporting workers, and combatting social isolation.
Brazil
A great many music schools and instrument stores have closed definitively.
Online music lessons have developed, and self-employed musicians with Internet access have proposed online performances.
The Brazilian State has shown negligence in the management of the pandemic and its consequences, in particular in the cultural sector

Indonesia
Online production is encouraged, but it is difficult for artists without a broad audience. The digital divide is evident in the outskirts of large cities.
Policies aimed at regulating art and creative activities on digital platforms are currently under discussion with the government.

Kenya
85% of musicians are without employment and have no income. Very few musicians propose their performances online as a result of the high cost of recording studios.

Zimbabwe
The cost of having access to recording studios is 2,000 Zimbabwean dollars, which considerably limits the possibility of using them.
Digital platforms carry out a rigorous selection. Only well-known artists can produce online, and, as a consequence, artistic diversity is almost non-existent.
No member of the ZIMU union is in a position to pay their fees.
A recent polemic: a police leader is said to have prohibited online concert productions since when musicians are increasingly reticent about sharing their performances on digital platforms for fear of reprisals.

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<th>Country</th>
<th>Government support for independent workers</th>
<th>Support fund for the cultural sector</th>
<th>Eligibility to support based on previous contracts</th>
<th>Trade union provides direct support</th>
<th>Venues allowed to host performances w/ audiences</th>
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