



Purpose»Driven

A report on the Global Contribution of Motor Sport to Economy and Community Development



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MOTOR SPORT AT A GLANCE

€159.2B

TOTAL
GROSS OUTPUT

1.5M

TOTAL
PAID JOBS

2.7M

MOTOR SPORT
PARTICIPANTS*

€66.8B

TOTAL
VALUE ADD

302,000

FORMAL (UNPAID) OFFICIALS,
MARSHALS AND VOLUNTEERS

60,700

EVENTS

21,600

LOCAL MOTOR
SPORT CLUBS

146

NATIONAL MOTOR SPORT
FEDERATIONS**

7,200

FACILITIES, TRACKS,
AND VENUES

* Participants include (i) 'competitors', (ii) 'officials, marshals and volunteers', and (iii) 'non-competing club members'

**National Sporting Authority/ies, members of the FIA (known by the French acronym ASN/ACN)

EXECUTIVE SUMMARY : ABOUT THIS STUDY

This study highlights the importance of the global motor sport industry, by estimating the economic contribution, value add and employment of the industry of FIA's 145 member countries in 2019. It also estimates other key measures, such as the number of participants, clubs and venues. The study is the first of its kind globally.

Fédération Internationale de l'Automobile (FIA)

The Fédération Internationale de l'Automobile (FIA) is the governing body for world motor sport. FIA seeks to lead the future of exciting, safe, sustainable and inclusive global motor sport and ensure its continued relevance by delivering a range of strategic priorities and related commitments, including but not limited to: (i) fostering innovation, (ii) implementing fair regulation, and (iii) developing FIA members throughout the sporting pathway.

Motor Sport industry definition

The FIA defines motor sport as: 'any competition or related sport activity restricted to vehicles that (i) have at least four non-aligned wheels and (ii) are constantly and entirely controlled by a driver on board the vehicle'. Motor sport incorporates a range of disciplines, including:

- Circuit, including Single seater, Touring Car, Sports car, Drag racing and Drifting
- Autotest, including Motorkhana, Khanacross and Time Attack
- Hillclimb
- Historic (up to 1990 cars only)
- Karting, including Superkarts
- Off-road, including Rallycross, Autocross and Cross Car
- Rally, including World Rally, Regional Rallies, Cross Country Rallies.

The FIA defines motor sport as: 'any competition or related sport activity restricted to vehicles that (i) have at least four non-aligned wheels and (ii) are constantly and entirely controlled by a driver on board the vehicle'. Motor sport incorporates a range of disciplines.

The motor sport industry is made up of the following interrelated components (see Chapter 3 for details):

- Participants, including: Competitors, Officials, marshals and volunteers, and non-competing club members
- Governing bodies, including FIA and National Sporting Authorities (ASN)
- Local Motor Sport Clubs
- Facilities, tracks and circuits
- Events, including event organisers, teams (see below), event attendees
- Professional teams
- Auto-related industries, including car and component manufacturers.

This study

EY-Parthenon B.V. was engaged on the instructions of the FIA to estimate the economic contribution of the global motor sport industry in 2019 ("Study").

This Study highlights the importance of the global motor sport industry, by estimating the economic contribution, value add and employment of the industry of FIA's 145 member countries in 2019. It also estimates other key measures, such as the number of participants, clubs and venues. The Study is the first of its kind globally, providing the opportunity for all of FIA's 145 member countries to directly contribute country-level data to build the evidence base for the analysis.

The Study relies on extensive primary market research (e.g., over 20,000 surveys completed by participants, local clubs, venue operators, global commercial rights holders, national promoters and team managers), existing data sources (e.g., official FIA data, including official list of World & Regional Championships, International Series, FIA graded venues) and consultation with a wide variety of industry stakeholders (50+ stakeholders) across key elements of the industry.

The impact of the COVID-19 pandemic on the motor sport industry has not been quantified, as this study focusses on the 2019 calendar year.

MOTOR SPORT INDUSTRY PARTICIPANTS AND OTHER COMPONENTS

The economic contribution generated by motor sport is driven by 2.7 million participants who take part in over 60,000 events that utilise over 7,200 tracks, venues and facilities across the globe.



2.7 MILLION

PARTICIPANTS*



60,700

EVENTS



21,600

LOCAL MOTOR SPORT CLUBS



7,200

FACILITIES, TRACKS & VENUES



146

NATIONAL MOTOR SPORT FEDERATIONS**

* Participants include (i) 'competitors', (ii) 'officials, marshals and volunteers', and (iii) 'non-competing club members'

** National Sporting Authority/ies, members of the FIA (known by the French acronym ASN/ACN)

ECONOMIC CONTRIBUTION

Motor sport stimulates economic activity across a range of sectors, including advanced manufacturing & engineering, traditional manufacturing and the services sectors.

Direct contribution

The direct contribution of motor sport reflects the economic activity directly generated by all elements of the motor sport industry, including activity generated by motor sport participants, governing bodies, Local Motor Sport Clubs, facilities, tracks and circuits, events, (semi) professional teams and auto-related industries.

In 2019, the motor sport industry directly generated:

€59.8B

GROSS OUTPUT

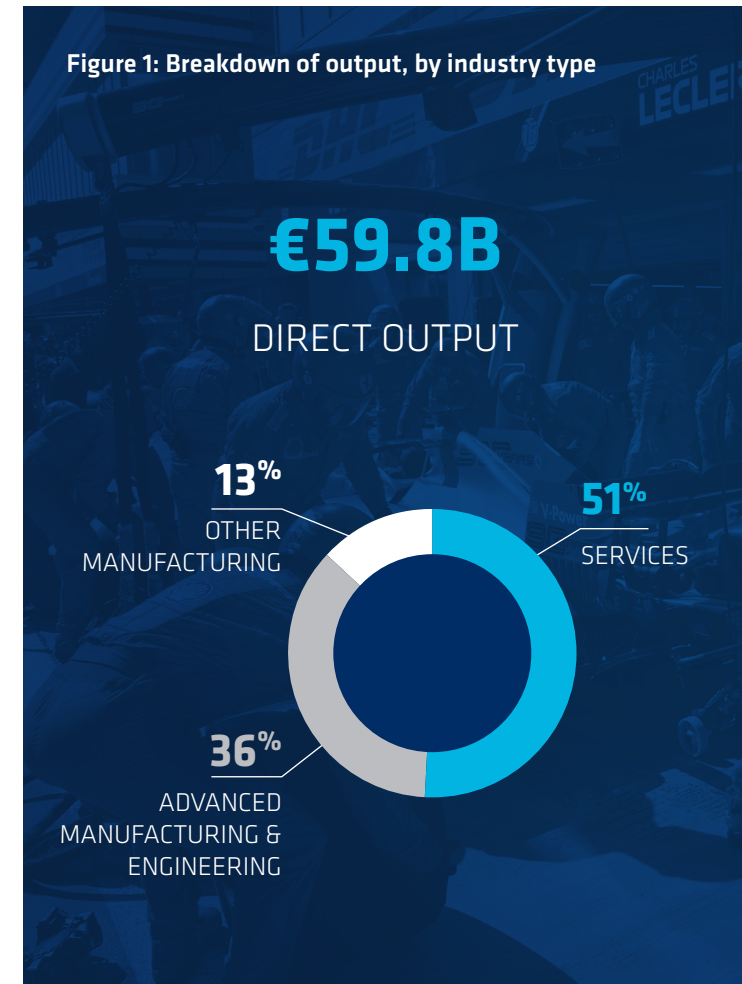
€25.0B

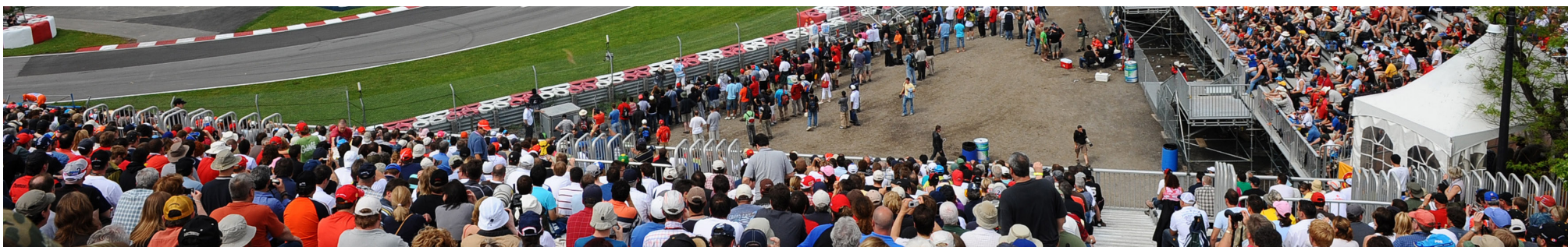
VALUE ADD

Gross Output represents the is the market value of goods and services (i.e., gross revenue) produced by each segment of the motor sport industry, after accounting for intra-industry sales (to avoid double counting).

Value Add is the market value of goods and services produced by the motor sport industry, after deducting the cost of goods and services used. That is, Value Add is a subset of Gross Output and represents the marginal/additional economic value generated by the motor sport industry. As such, direct value add is commonly put forward as the most appropriate measure of the relative contribution of an industry the economy.

Figure 1: Breakdown of output, by industry type





Total contribution

The direct economic contribution of the global motor sport industry also generates 'flow on' effects to other industries, including supplier demand for intermediate goods and services and additional consumption by people employed in the motor sport industry.

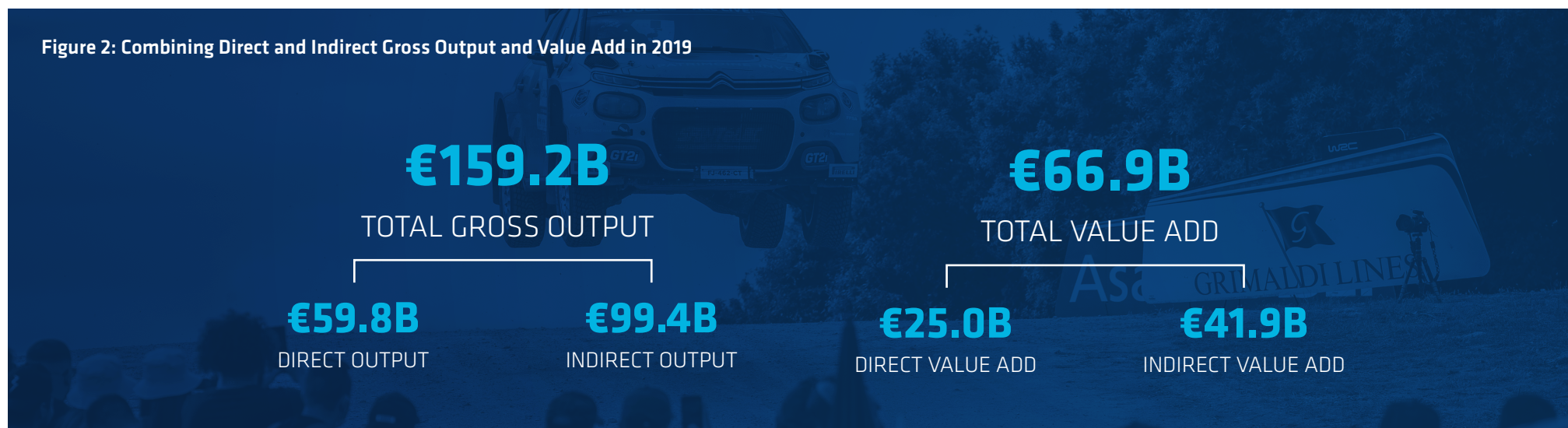
For example, additional money spent at restaurants by event attendees is allocated between the additional material inputs (such as food and drink), wages, and profits of the proprietor. Wages spent by the employees of the restaurant (for example, on household items) circulates the money throughout a broader section of the economy creating indirect benefits. This includes flow on expenditure on motor sport and non-motor sport related items.

€159.2B	€66.9B
TOTAL GROSS OUTPUT	TOTAL VALUE ADD

After combining the direct and indirect contribution, in 2019, the motor sport industry generated an economic contribution to the global economy of:

- €159.2b Gross Output, including €59.8b direct and €99.4b indirect output.
- €66.9b Value Add, including €25.0b direct and €41.9b indirect Value Add.

Figure 2: Combining Direct and Indirect Gross Output and Value Add in 2019

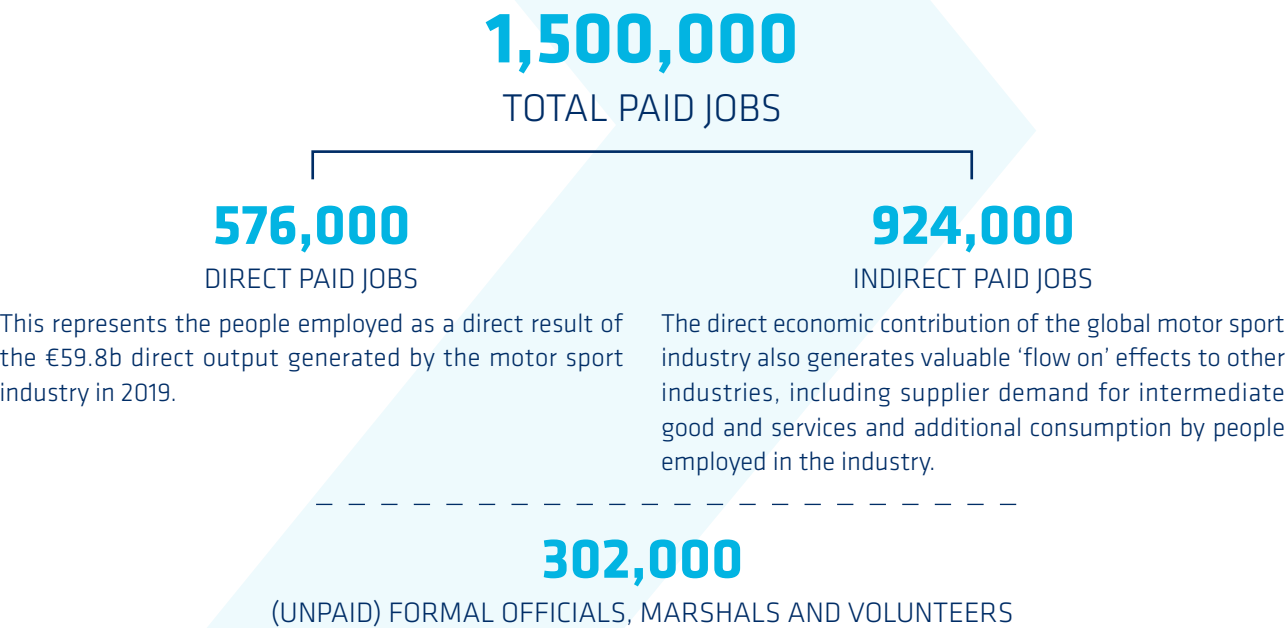


EMPLOYMENT

The motor sport industry supports a broad range of employment and volunteering opportunities across the economy, including advanced manufacturing & engineering.

Employment + formal (unpaid) officials, marshals and volunteers

In 2019, the motor sport industry generated over 1.8 million (paid) jobs and (unpaid) formal officials, marshals and volunteers. This includes flow on expenditure on motor sport and non-motor sport related items.

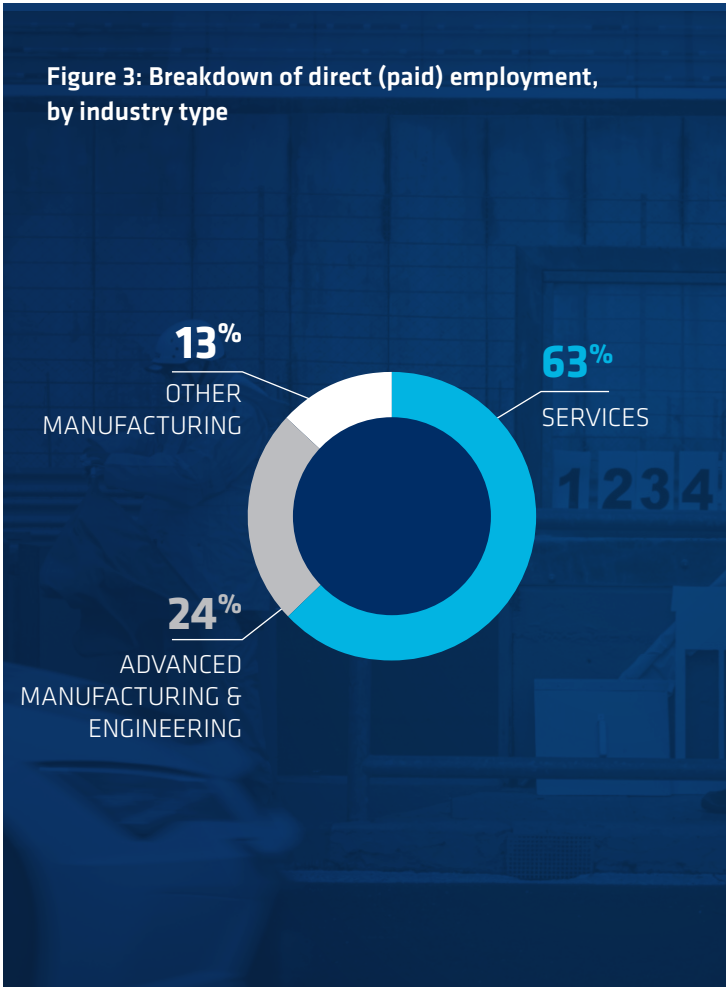


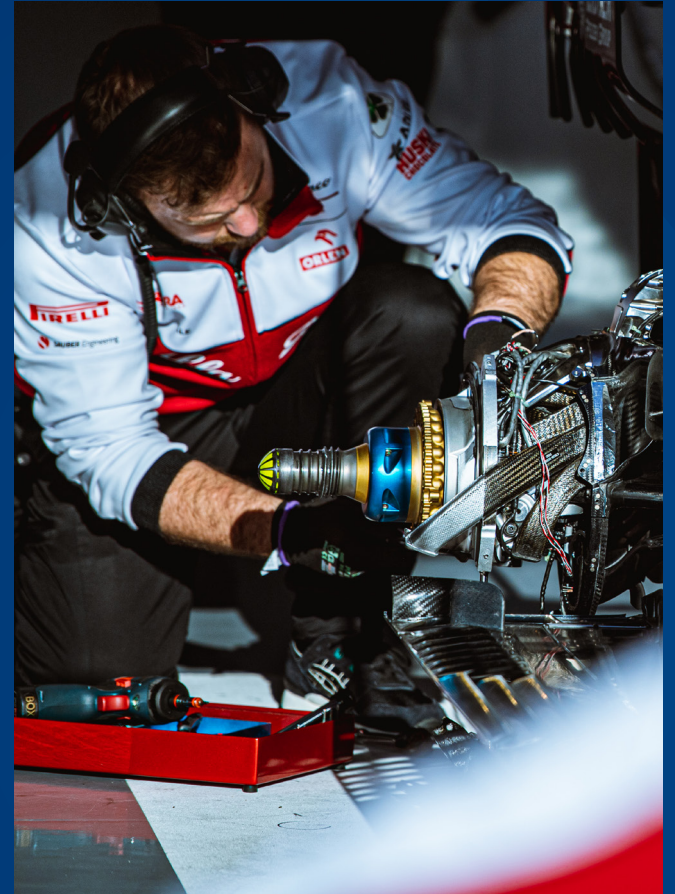
This represents the people employed as a direct result of the €59.8b direct output generated by the motor sport industry in 2019.

The direct economic contribution of the global motor sport industry also generates valuable ‘flow on’ effects to other industries, including supplier demand for intermediate good and services and additional consumption by people employed in the industry.

Formal officials, marshals and volunteers are individuals who formally assist with the organisation and/or adjudicating of motor sport competitions (as advised by ASNs via their responses to the ASN Survey). In 2019, c.302,000 (11% of all motor sport participants) were formally recognised officials, marshals and volunteers. Most of these formal

officials, marshals and volunteers will not be captured in the (paid) jobs estimate outlined above because, apart from a selection of professional events, most of these cohort will likely be unpaid. In addition to directly benefiting motor sport, volunteerism has been shown to deliver broader benefits to the volunteers themselves and the broader community.







1 >> INTRODUCTION

MOTOR SPORT INDUSTRY ECONOMIC STUDY OVERVIEW

Motor sport incorporates any competition or related sport activity restricted to vehicles that (i) have at least four non-aligned wheels and (ii) are constantly and entirely controlled by a driver on board the vehicle.

Fédération Internationale de l'Automobile (FIA)

The Fédération Internationale de l'Automobile (FIA) is the governing body for world motor sport. FIA seeks to lead the future of exciting, safe, sustainable and inclusive global motor sport and ensure its continued relevance by delivering a range of strategic priorities and related commitments, including but not limited to: (i) fostering innovation, (ii) implementing fair regulation, and (iii) developing FIA members throughout the sporting pathway.

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This Study highlights the importance of the global motor sport industry, by estimating the economic contribution, value add and employment of the industry of FIA's 145 member countries in 2019. It also estimates other key measures, such as the number of participants, clubs and venues. The Study is the first of its kind globally, providing the opportunity for all of FIA's 145 member countries to directly contribute country-level data to build the evidence base for the analysis.

The Study relies on extensive primary market research (e.g., over 20,000 surveys completed by participants, local clubs, venue operators, global commercial rights holders, national promoters and team managers), existing data sources (e.g., official FIA data, including official list of World & Regional Championships, International Series, FIA graded venues) and consultation with a wide variety of industry stakeholders (50+ stakeholders) across key elements of the industry.

The impact of the COVID-19 pandemic on the motor sport industry has not been quantified, as this study focusses on the 2019 calendar year.

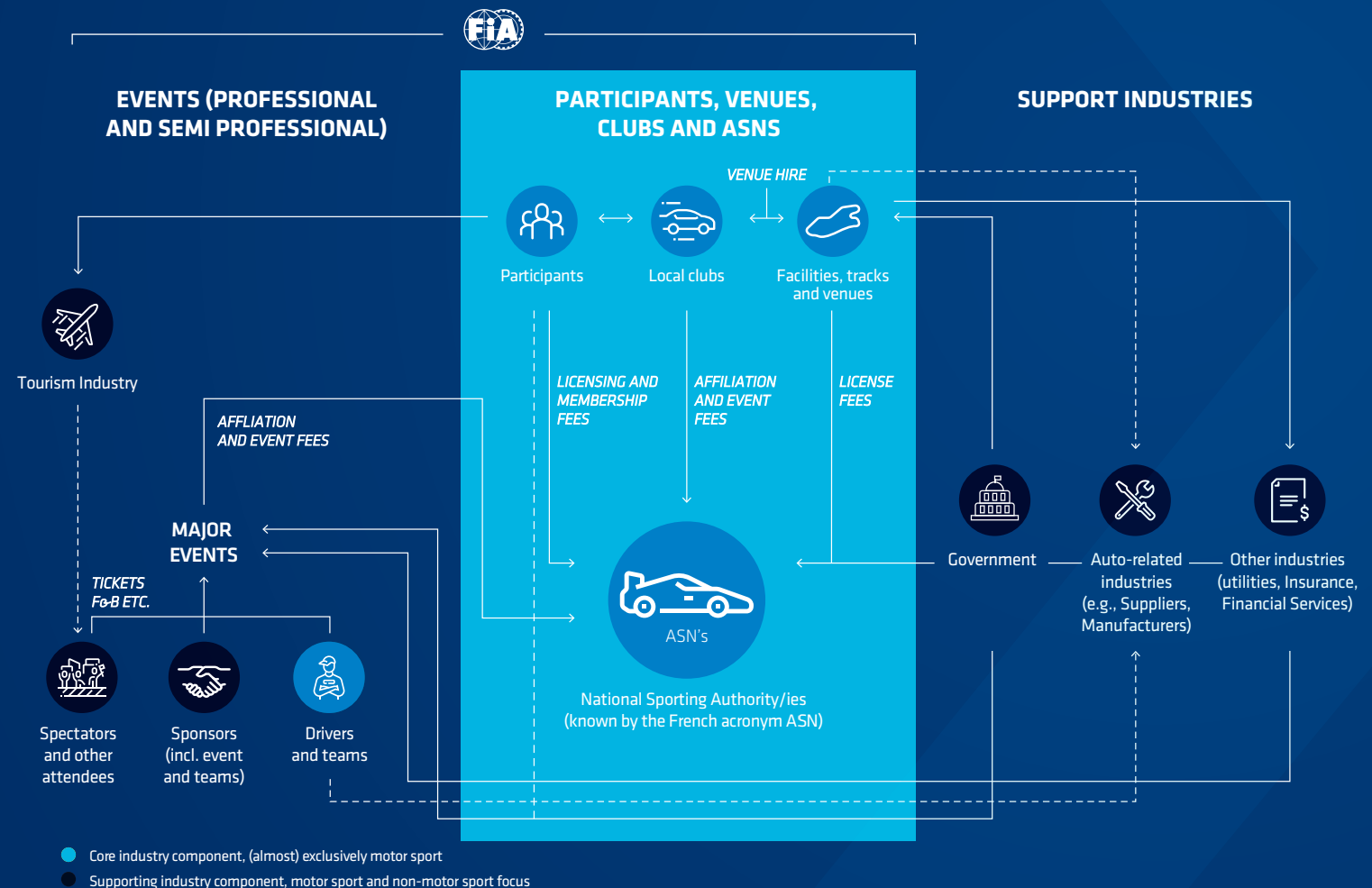


MOTOR SPORT INDUSTRY MAP

The global motor sport industry includes and supports: participants; events; facilities, tracks and venues; governing bodies; manufacturers and suppliers.

The motor sport industry is made up of the following interrelated components (see Chapter 3 for details):

- Participants, including: Competitors, Officials, marshals and volunteers, and non-competing club members **2.7 million**
- Governing bodies, including FIA and National Sporting Authorities (ASN) **146**
- Local Motor Sport Clubs **21,600**
- Facilities, tracks and circuits **7,200**
- Events, including event organisers, teams (see below), event attendees
- Professional teams
- Auto-related industries, including car and component manufacturers.







2 » ECONOMIC CONTRIBUTION

MOTOR SPORT INDUSTRY OUTPUT & VALUE ADD

The global motor sport industry directly contributed €59.8b industry output, including €25b value added, in 2019.

Direct contribution

In 2019, the motor sport industry directly generated:

- **€59.8b Direct Gross Output**

Gross Output represents the market value of goods and services (i.e., gross revenue) produced by each segment of the motor sport industry, after accounting for intra-industry sales (to avoid double counting).

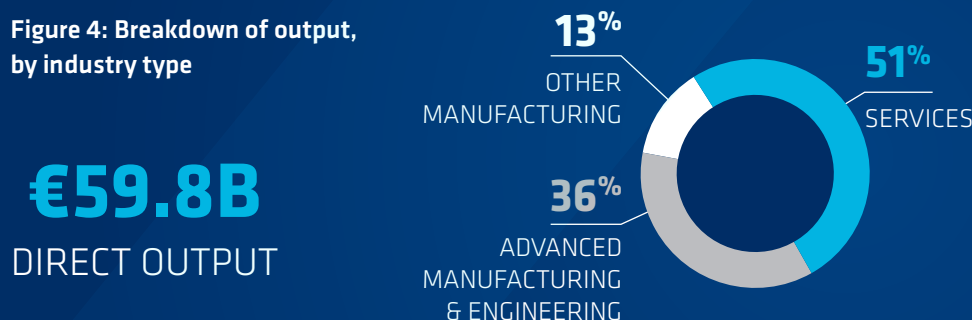
- **€25.0b Direct Value Add**

Value Add is the market value of goods and services produced by the motor sport industry, after deducting the cost of goods and services used. That is, Value Add is a subset of Gross Output and represents the marginal/additional economic value generated by the motor sport industry. As such, direct value add is commonly put forward as the most appropriate measure of the relative contribution of an industry to the economy.

This direct contribution reflects the economic activity directly generated by all elements of the motor sport industry (See Chapter 1).

Of the €59.8b direct output generated by the motor sport industry, €21.9b (36%) involves advanced manufacturing & engineering, which generates 140,000 Advanced Manufacturing jobs.

Figure 4: Breakdown of output, by industry type



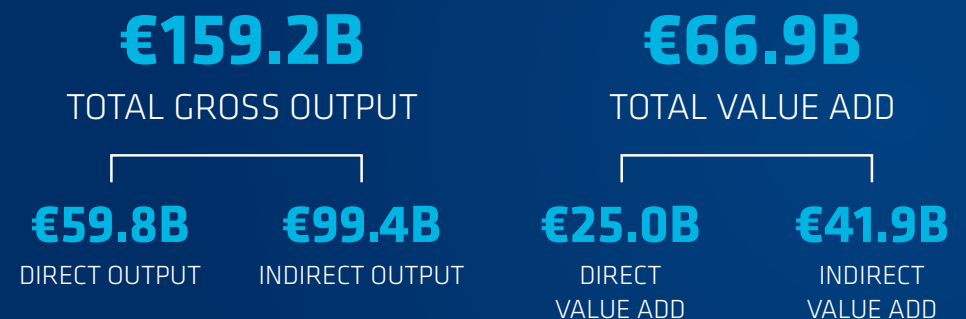
Total contribution

The direct economic contribution of the global motor sport industry also generates 'flow on' effects to other industries, including supplier demand for intermediate goods and services and additional consumption by people employed in the motor sport industry. For example, additional money spent at restaurants by event attendees is allocated between the additional material inputs (such as food and drink), wages, and profits of the proprietor. Wages spent by the employees of the restaurant (for example, on household items) circulates the money throughout a broader section of the economy creating indirect benefits. This includes flow on expenditure on motor sport and non-motor sport related items.

After combining the direct and indirect contribution, in 2019, the motor sport industry generated an economic contribution to the global economy of (see Figure 5):

- €159.2b Gross Output
- €66.9b Value Add

Figure 5: Direct, Indirect and Total Industry Output & Value Add (€b)



MOTOR SPORT INDUSTRY EMPLOYMENT

The motor sport industry supports a broad range of employment and volunteering opportunities across the economy, including advanced manufacturing.

Employment (paid employment, Direct and Indirect)

In 2019, the motor sport industry generated paid 1.5 million jobs (full time, part time and casual), including (see Figure 6):

- **576,000 direct jobs**

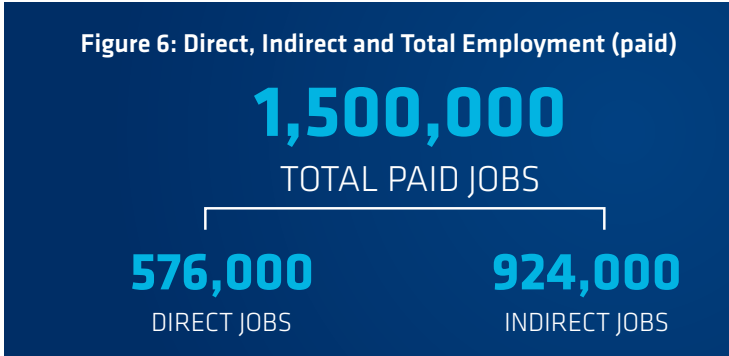
This represents the people employed as a direct result of the €59.8b direct output generated by the motor sport industry in 2019 (refer to Chapter 2.3 from breakdown, including Advanced Manufacturing).

- **924,000 indirect jobs**

The direct economic contribution of the global motor sport industry also generates valuable ‘flow on’ effects to other industries, including supplier demand for intermediate good and services and additional consumption by people employed in the industry.

This direct contribution reflects the economic activity directly generated by all elements of the motor sport industry, including activity generated by motor sport participants, governing bodies, Local Motor Sport Clubs, facilities, tracks and circuits, events, (semi) professional teams and auto-related industries.

Figure 6: Direct, Indirect and Total Employment (paid)

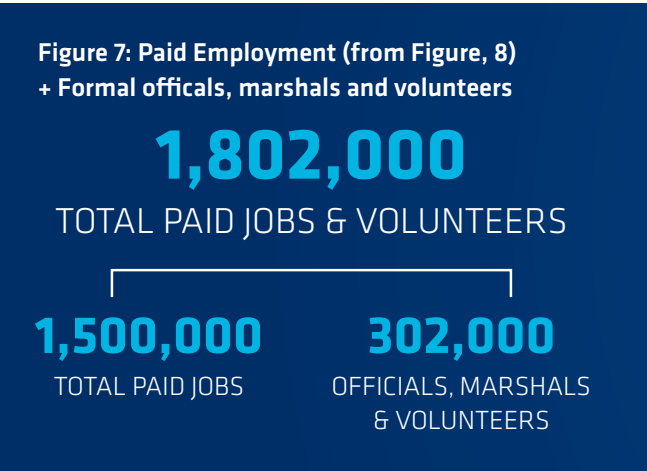


Officials, marshals and volunteers

Of the 2.7 million people who participated in motor sport in 2019 (see Chapter 3.2 for breakdown), many were officials, marshals and volunteers who are not directly captured in the (paid) employment estimates above. This includes:

Formal participants: Formal officials, marshals and volunteers are individuals who formally assist with the organisation and/or adjudicating of motor sport competitions (as advised by ASNs via their responses to the ASN Survey). In 2019, c.302,000 (11% of all motor sport participants) were formally recognised officials, marshals and volunteers. Most of these formal officials, marshals and volunteers will not be captured in the (paid) jobs estimate outlined above because, apart from a selection of professional events, most of these cohort will likely be unpaid. (see Figure 7.

Figure 7: Paid Employment (from Figure, 8) + Formal officials, marshals and volunteers

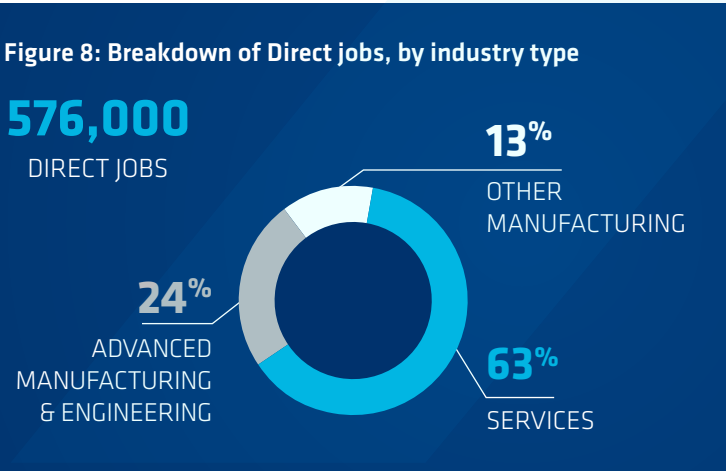


We note that there may be some double counting, given some officials and/or marshals are in paid roles)

Informal participants: Informal volunteers are individuals that are members of a local club but do not compete or formally officiate in events. These informal participants include additional local/unofficial volunteers

These formal and informal officials, marshals and volunteers are responsible for facilitating the majority of the 60,000+ motor sport events staged each year. In addition to directly benefiting motor sport, volunteerism has been shown to deliver broader benefits to the volunteers themselves and the broader community.

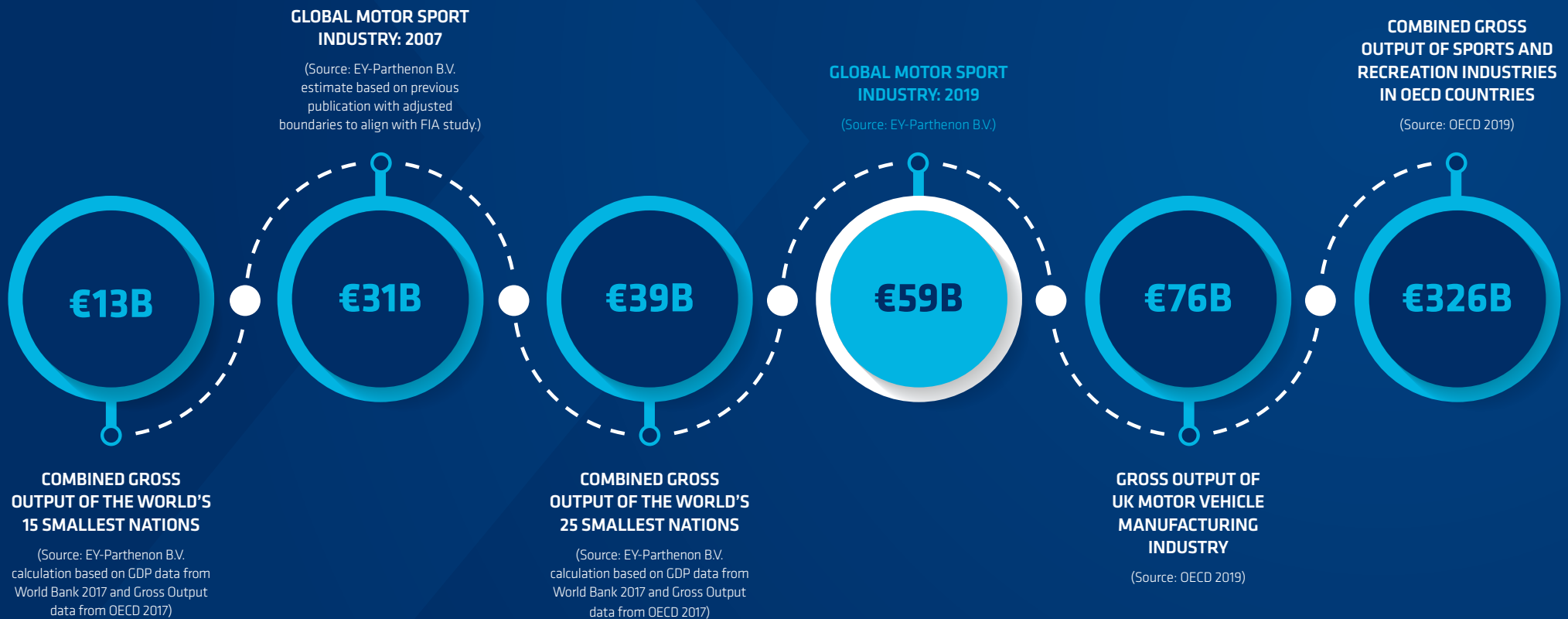
Figure 8: Breakdown of Direct jobs, by industry type

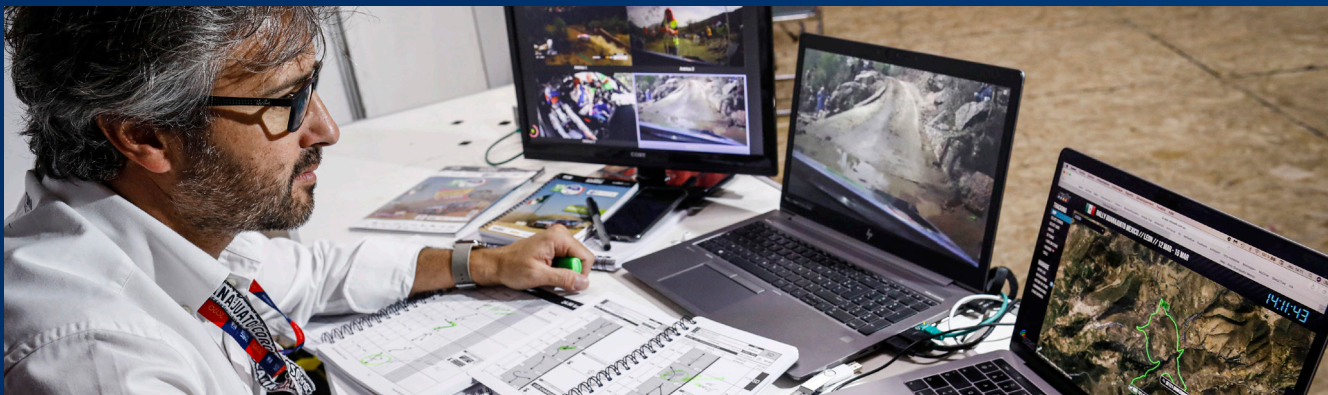


MOTOR SPORT INDUSTRY SIZE COMPARISON

The economic contribution of the motor sport industry continues to grow and is now larger than the combined Gross Output of the world's 25 smallest nations (all values converted to 2019 EUR to allow for meaningful comparison).

The global motor sport industry grew by 90% between 2007 and 2019.









3 >> INDUSTRY BREAKDOWN

INDUSTRY BREAKDOWN

The economic contribution generated by motor sport is driven by 2.7 million participants who take part in over 60,000 events that utilise over 7,200 tracks, venues and facilities across the globe.



2.7 MILLION

PARTICIPANTS*



OFFICIATE (MARSHAL AND/OR VOLUNTEER) ONLY:

231,000

(9% OF ALL PARTICIPANTS)



COMPETE ONLY:

917,000

(34% OF ALL PARTICIPANTS)



COMPETE AND OFFICIATE:

72,000

(3% OF ALL PARTICIPANTS)



NON-COMPETING CLUB MEMBERS:

1.5 MILLION

(55% OF ALL PARTICIPANTS)

* Participants include (i) 'competitors', (ii) 'officials, marshals and volunteers', and (iii) 'non-competing club members'

National Sporting Authority/ies (known by the French acronym ASN)



Events

The global motor sport industry includes and supports 60,700 events, including:

- 324 FIA World & Regional Championships events/rounds (see Figure 12)
- 556 FIA International Series events/rounds (see Figure 9)
- 59,820 Other events (e.g., National & Local Championships and Series, other events)

Facilities, tracks and venues

The global motor sport industry includes and supports 7,200 motor sport facilities, tracks and venues, including:

- 229 unique FIA Graded circuits (see Figure 10)
- 59 FIA Graded karting tracks (see Figure 10)
- 6,912 other motor sport facilities, tracks and venues

Other components of the motor sport industry

The global motor sport industry includes and supports:

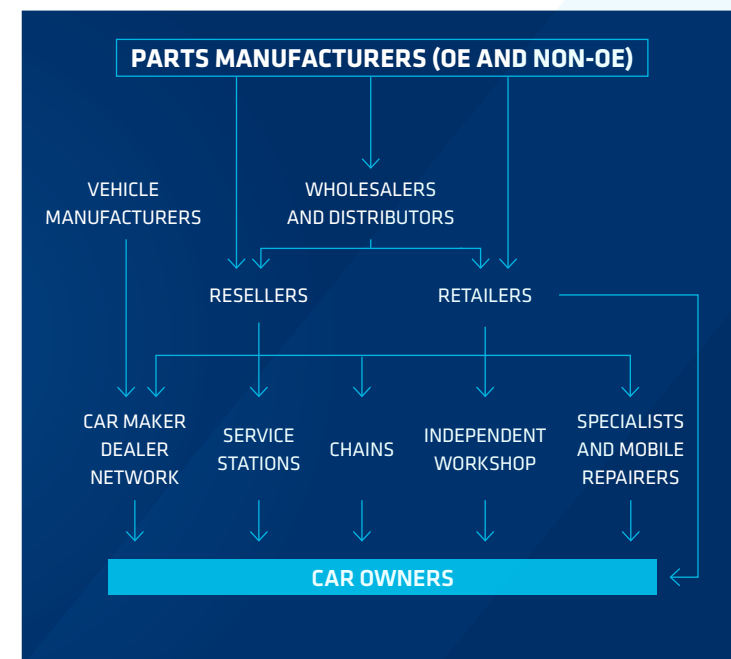
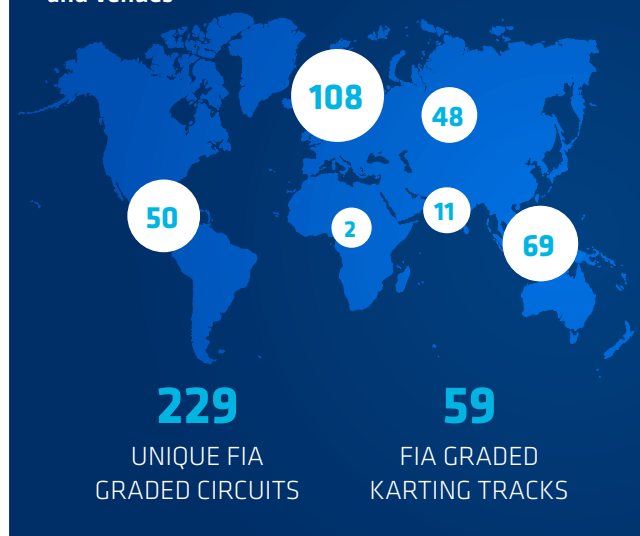
- 21,600 Local Motor Sport Clubs (excluding non-motor sport clubs)
- FIA and FIA's 145 member ASNs
- An international network of car manufactures, component manufactures and other supply/support industries

See the aftermarket distribution network

Figure 9: Major professional FIA events



Figure 10: FIA/CIK graded facilities, tracks and venues





4 >> THE NATIONAL MOTOR SPORT FEDERATIONS

THE NATIONAL MOTOR SPORT FEDERATIONS (ASNS) AROUND THE WORLD

Preamble

Motor sport is a wide-ranging sport, welcoming people from all backgrounds and catering for all shapes and sizes, notwithstanding the fact that it is one of the very few sporting activities that allow male and female participants to compete alongside each other in the same competition on equal terms. There can be little doubt that motor sport occupies a position of significant importance on the international sporting landscape.

Furthermore, at national level, children are welcomed from the age of 12 in some disciplines (much earlier in Karting), creating a strong learning platform for skills that will serve young people well in later life - discipline, responsibility, risk management and teamwork, not to mention essential engineering skills.

Motor sport contributes significantly to a nation's community spirit by fostering a sense of social cohesion, a sense of identity, a feeling of belonging and a spirit of equality, and promotes the viability of volunteerism and increased participation as its cornerstone. It is worthy of government support.

National Motor Sport Federations (ASNs)

The FIA consists of its members, national mobility and motor sport federations from all over the world which have joined together to better carry on their activities and to defend their common cause, motor cars and their use.

The ASNs are responsible national authorities to regulate motor sport in their respective countries. An ASN role is to promote and achieve safety, fairness, and social responsibility in the conduct of the sport.

The ASNs are:

- responsible for the governance and administration of all recognised forms of motor sport in the country, regardless of level, by controlling the technical and sporting rules across the various disciplines;
- the only authority in the country permitted to issue motor sport licences for all levels of motor sport (excluding FIA Super Licences and FIA Officials' licences).

Its role is:

- to develop and maintain an environment that enables people to enjoy motor sport as a leisure and sporting activity;
- to promote and improve motor sport as a widely recognised, accepted and respected sport; and to uphold the values and spirit of competitive sport and fairness;
- to enjoy and participate in the adventure and challenge of cars being driven with speed, safety and skill;
- to ensure the professional and modern management of its business. It will create an environment in which people can contribute and expand their skills in and commitment to all aspects of the sport;
- to develop and maintain safety, technical, judicial, accreditation, training and compliance systems, and other intellectual property necessary for the effective management and development of the sport and for these systems and services to be provided to members, other customers and the community in order to achieve the ASN's goals;
- to establish and operate a judicial and disciplinary system for motor sport in the country;
- to promote programmes aimed at safety, training and education in motoring and motor sport;
- to ensure that all competitors, support staff and competitions under its jurisdiction adhere to the Anti-Doping Regulations of the ASN, and that all international level competitions conducted in its territory adhere to the FIA Anti-Doping Regulations appended to the Code.

ASNs around the world contributed valuable information about motor sport in their countries that helped in the creation of this report.



GLOSSARY

Direct Gross Output

The market value of goods and services produced by the motor sport industry

Direct Value Add

The market value of goods and services produced by the motor sport industry, after deducting the cost of goods and services used. That is, Direct Value Add is a subset of Direct Gross Output and represents the marginal/additional economic value generated by the motor sport industry (e.g. direct wages, taxes and profits generated by the motor sport industry)

Direct Paid Jobs

The number of paid jobs (full time, part time and casual) directly supported by the motor sport industry

Indirect Gross Output, Value Add and/or Jobs

The flow-on, or multiplier, effects of the direct expenditure throughout the economy. That is, economic activity directly generated by the motor sport industry produces subsequent rounds of spending and income generation. For example, money spent at restaurants by event attendees is allocated between the additional material inputs (e.g. food and drink), wages, and profits of the proprietor. Wages spent by the employees of the restaurant (e.g. on household items) circulates the money throughout a broader section of the economy creating indirect benefits. The multipliers used and therefore the size of the indirect contribution depends on the type of direct expenditure and the structural features of the economy.

Total Gross Output

Direct Gross Output + Indirect Gross Output

Total Value Add

Direct Value Add + Indirect Value Add

Total Paid Jobs

Direct Paid Jobs + Indirect Paid Jobs

Advanced Manufacturing & Engineering

For the purposes of this Study: (i) Advanced Manufacturing & Engineering seeks to capture manufacturing processes that take advantage of high-technology or knowledge-intensive inputs as an integral part of its manufacturing process, and (ii) the following motor sport-related industries (as defined by the Organisation for Economic Co-operation and Development (OECD)) are classified as 'Advanced Manufacturing & Engineering' due to their relatively high level of R&D intensity and use of highly-skilled workers (as a proxy measure for advanced manufacturing): motor vehicles, trailers and semi-trailers manufacturing; fabricated metal products, except machinery and equipment; computer, electronic and optical products; other manufacturing; repair and installation of machinery and equipment.

Services

For the purposes of this Study, the following motor sport-related industries (as defined by the OECD) are classified as 'services': sports activities and amusement and recreation activities; accommodation and food service activities; professional, scientific and technical activities; administrative and support service activities; transportation and storage; IT and other information services.

Other manufacturing

For the purposes of this Study, the following motor sport-related industries (as defined by the OECD) are classified as 'other manufacturing': construction; textiles, wearing apparel, leather and related products; rubber and plastics products, and other non-metallic mineral products; chemical, rubber, plastics, fuel products and other non-metallic mineral products.



DISCLAIMER

FIA motor sport global impact study

In accordance with the instructions provided by Federation Internationale de l'Automobile (FIA), EY Parthenon B.V. (EY Parthenon) have performed work as contractually agreed between FIA and EY Parthenon B.V. (EY Parthenon) in connection with assisting FIA in conducting the global motor sport impact study in 2019 (the "Services").

This document was prepared on the specific instructions by duly authorised persons within the FIA solely for the Services and should not be used or relied upon for any other purpose. This document and its contents may not be quoted, referred to or shown to any other parties without permission of FIA.

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Neither FIA nor EY Parthenon accept any claim or demand or any actions or proceedings that may be brought against FIA or EY Parthenon arising from or connected with the contents of this document or the provision of the document to the third parties. FIA and EY Parthenon are released and forever discharged from any such claims, demands, actions or proceedings.

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EY Parthenon do not imply and it should not be construed that they have verified any of the information provided, or that their enquiries could have identified any matter that a more extensive examination might disclose. The findings in this document are based, in part, on the assumptions stated and on information provided by FIA and other information sources used during the course of the engagement. The modelled outcomes are contingent on the collection of assumptions as agreed with FIA and no consideration of other market events, announcements or other changing circumstances are reflected in this document.

The analysis and this document do not constitute investment advice or a recommendation to anyone on a future course of action.

The analysis was completed on [23 April 2021]. Therefore, this document does not take account of events or circumstances arising after [23 April 2021]. Neither party has a responsibility to update the report for such events or circumstances



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