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Views on the Crisis Impact on the Tourism Sector in Egypt



Introduction

While the whole world shares the broad outlines of the economic and social repercussions of the Coronavirus (COVID-19), which are unprecedented in its recent history, the implications thereof for each country are linked to the nature of each country's economic system, its ability to withstand the entailed repercussions and the speed of its recovery.

In light of the need to study the sectoral implications of these repercussions in order to address the crisis properly, the Egyptian Center for Economic Studies (ECES), in its initiative, is

producing a set of daily reports entitled "Views on Crisis". The reports aim to analyze the implications of the coronavirus crisis for Egypt in relation to a number of vital production and service sectors and to key macroeconomic variables. This ECES initiative comes from the belief that the current critical conditions require directing state's efforts towards achieving two main goals: providing a decent life for Egyptians during the crisis and in the recovery phase, preserving the existing investments- especially domestic investments- and helping to overcome the crisis and prepare for a rapid launch with the gradual decline of the crisis and recovery of the global economy.

The methodology used in these reports is based on an analysis of the supply and demand shocks associated with the crisis cycle in its various stages. Given the lack of detailed data on the sectoral impact of the crisis, the sectoral analysis is based on logical assumptions related to the nature of each sector and the degree of sector vulnerability to previous severe crises that were certainly less severe than the current crisis and different in nature. However, it is a starting point for the urgently required scientific diligence at this stage.

The reports attempt to provide a detailed perception of the magnitude and direction of crisis impact on each sector at present and until the end of the crisis. They aim to propose quick solutions to reduce the adverse impacts of the crisis in a balanced and integrated means that complement the serious efforts made by the state in this regard, and to offer other longer-term solutions to the existing institutional flaws, clearly revealed by the crisis. It is high time that these flaws are radically removed, which will improve post-crisis development efforts.

“The pessimist sees difficulty in every opportunity. The optimist sees the opportunity in every difficulty”

Winston Churchill

* Reports will be issued in Arabic on a daily basis. An English translation of each report will be sent on the day following its issuance.

First: Brief description of the subject of the report

The tourism sector¹ is by its very nature a highly sensitive sector and is seriously affected by local and international events, especially negative ones. Therefore, tourism in Egypt is facing a major crisis due to the emergence and spread of the Corona virus globally. We start by presenting the most important features of the sector and then determine the likely negative repercussions of the crisis.

- European countries account for the largest share of tourists coming to Egypt, with an average share exceeding 50 percent, led by Germany (13%), Russia (12%), the UK (7%), and Italy (3%), while the Middle East region occupies the second place with about 22%, followed by African countries (7%), and Asia- Pacific countries (6.6%).
- Tourism is a labor-intensive sector, with a labor population of about 1.8 million in 2014 (the latest available data), representing about 9.5 percent of total employment in all sectors (World Travel and Tourism Council).

¹ This report draws on the latest published data available from Egyptian sources (the monthly bulletins of the Central Bank of Egypt, the Central Agency for Public Mobilization and Statistics, and the Ministry of Tourism), global sources, as well as the Observatory of Competitiveness for the Tourism Sector and the Road Map for the Tourism Sector in Egypt published by the Egyptian Center for Economic Studies, in addition to consulting with many experts in the sector.

- Tourism contributes, on average, about 12% of GDP² (direct and indirect contribution).
- Tourism revenue reached \$12.6 billion in 2018/2019 as the highest tourism revenue in Egypt's history.
- The number of tourists coming to Egypt reached 9.8 million in 2017/2018, compared to 6.6 million tourists in the previous year, a growth rate of 49%.
- The number of tourist nights registered 102.6 million nights in 2017/2018, a significant increase from the previous year (102%).
- Hotel occupancy rates decreased during the period 2012-2016, although the general average in 2017 increased to 34% compared to the previous year (30%).
- Distribution of inbound tourism to Egypt is unbalanced in favor of "tourism and entertainment," as well as in terms of access routes where air transport accounts for a huge share.
- Beach tourism, entertainment and cultural tourism account for a share of more than 95%, with a huge differential from the rest of tourism types in Egypt.
- The level of spending³ by tourists in Egypt ranges from \$25 to \$250 or more.

² The World Travel & Tourism Council (WTTC).

³ Spending was estimated according to an approximate average level of spending per night.

- The level of spending varies according to the nationality of the tourist (with Arab countries spending the most), and the type of tourism (exhibition and conference tourism is the most profitable).
- Tourist spending (cultural tourism) is divided on average into: 40% accommodation, 35% transportation, 10% site visits, 12-15% personal expenses. As for beach tourism, about 97% of spending goes to hotels, including their services.
- Most establishments operating in the tourism sector receive their dues at the end of the month, as transactions are dealt with in terms of total operations during a certain period, often a month.
- The year 2009/2010 is the most popular in terms of incoming tourism and contribution to service exports, while 2015/2016 is the lowest during the period.
- 2019/2020 heralded more improvement compared to the previous year, as tourism revenues in the first quarter (July-September) amounted to \$4.2 billion compared to \$3.2 billion in the corresponding quarter of the previous year. Tourism revenues amounted to about \$2 billion for the months of December 2019 and January 2020, and \$2 billion for February of the same year in which a remarkable boom was observed and was expected to continue during the remainder of the fiscal year had it not been for the outbreak of the Corona crisis.

- The tourism sector is highly intertwined with other sectors (food, textiles and furnishings, handicrafts, etc.), and therefore any shocks incurred lead to both direct effects on the sector itself and indirect effects on other sectors.
- The tourism sector has been exposed to many crises during the current decade, incurring heavy losses since the start of the negative repercussions of the January 25th, 2011 Revolution up until 2016/2017, as shown in the table below:

Year	Crisis	Impact on incoming tourism	Impact on tourism revenue
2010/2011	The repercussions of the January 25th Revolution	-13.3%	-8.6%
2011/2012	The continuing repercussions of the January 25th Revolution	-8.2%	-11%
2013/2014	The repercussions	-34.8%	-48%

	of the June Revolution		
2015/2016	Some countries banned their citizens from traveling to Egypt	-32.6%	-48.9%

Source: Growth rates were calculated according to data from the Monthly Statistical Bulletins published by the Central Bank of Egypt.

These previous crises resulted in a decline in tourism movement as follows:

- The number of tourist arrivals decreased from 14 million in 2009/10 to 6.6 million in 2016/2017.
- Tourism revenues decreased by 78% in 2016 compared to 2010, according to data from the Ministry of Tourism.
- Some foreign countries banned their citizens from traveling to Egypt in the aftermath of the crash of the Russian plane over Sinai in 2015, and the ban lasted until 2017. These countries are Germany, Norway, Belgium, Finland, Sweden, Denmark, the UK (the ban was lifted in October 2019) and Russia, which are one of the highest sources of tourists to Egypt.
- Accordingly, owners of tourist establishments were unable to fulfill many of their financial obligations, about 90% of hotels defaulted and a large number of workers were laid off.

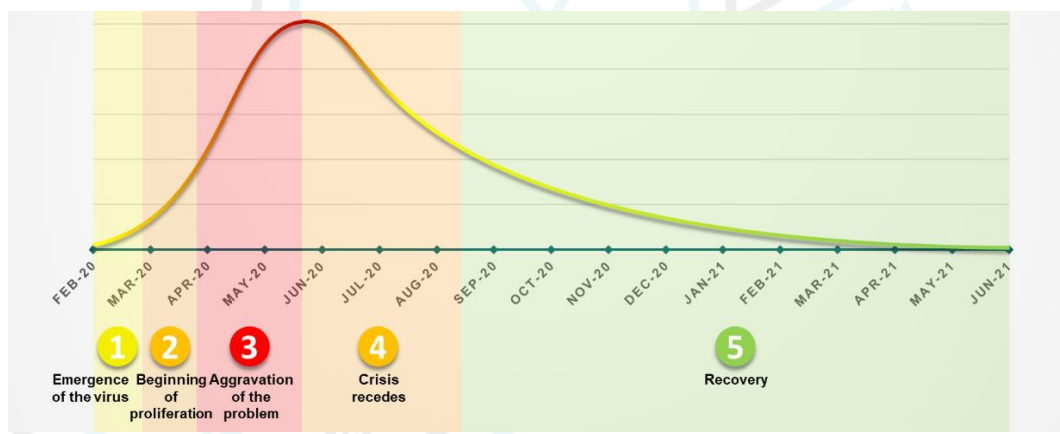
Second: Demand and supply shocks in the context of the crisis cycle

a) The state of tourism in the world

- Supply and demand shocks to the tourism sector in Egypt cannot be studied in isolation from what is happening in the world. So, it is necessary to follow up on what is happening to the sector globally. Total losses of the tourism sector globally since the virus outbreak stand at around \$12 billion, in addition to the losses of the aviation sector, which were estimated at about €5 billion (\$5.5 billion).
- The World Tourism Organization estimated that the number of tourists globally may decrease in 2020 by 1% to 3%, instead of growth between 3% and 4%, as was expected for 2020 at the beginning of January this year. This is tentatively expected to result in losses in global tourism revenue between \$30 and \$50 billion. The most affected tourist destinations are the Asia-Pacific region, whose losses are estimated at about \$7 billion according to recent data issued by the Organization.

b) The tourism situation in Egypt

- In general, there are no accurate figures announced yet about the extent of impact on the tourism sector in Egypt. A decrease of 70-80% in new bookings of Egyptian destinations was announced during the second week of March, compared to the corresponding period last year.⁴
- The expected impact on the demand and supply sides depends on the relevant stage in the crisis cycle. We can trace five stages of the crisis cycle, as shown in the figure below:



Below is a brief description of each stage:

The first stage: Emergence of the virus

The crisis began and aggravated in China only. The rest of the world, including Arab and European countries, were not yet affected by the crisis.

The second stage: Beginning of proliferation

⁴ According to a statement by the president of the Chamber of Travel and Tourism Companies on the Al-Mal newspaper website.

The spread of the virus globally. Arab countries began to be affected at the end of February and hence initiated precautionary measures to prevent the spread of the virus. European countries are greatly affected.

The third stage: Aggravation of the problem

The situation in the world has worsened, tougher measures in the Arab countries, especially in Saudi Arabia and the European countries, a major worsening of the crisis in Italy, beginning of the virus's receding in China, and the beginning of its spread in the US.

Fourth stage: Crisis recedes

The beginning of recovery from the virus globally, starting from China, which is expected to be followed by European countries, and finally, the Arab countries and the US.

Fifth stage: Recovery

Gradual recovery for all countries, including Arab countries, although the latter's recovery is expected to be delayed due to being strongly impacted by the global economy and its weak impact on it.

The table below presents possible scenarios⁵ for tourism movement and tourism revenue according to the crisis cycle and in the context of different possibilities of supply and demand shocks under the following assumptions and concepts:

⁵ These estimates should be read with caution, as expectations may require further revision due to the evolving nature of the virus outbreak day by day, and its duration and scope are still unknown.

1. Tourist demand shock: decrease in the number of tourists who travel or wish to travel to Egypt.
2. Tourism supply shock: low ability of the tourism sector in Egypt to provide activities, events, services, and tourism products to make the travel experience successful for tourists (accommodation, entertainment, air and road transport and employment services).
3. The analysis focuses on foreign tourism only, as it has the largest share (90%) compared to domestic tourism (10%).
4. Hajj and Umrah tourism was excluded, as the analysis is concerned with the movement of incoming tourism to Egypt.
5. Based on data for the first quarter, direct tourism revenue for 2019/2020 was estimated at \$4.2 billion according to the most recent Monthly Statistical Bulletin of the Central Bank of Egypt, and according to monthly average revenue for the year 2018/2019 (\$1 billion), in addition to the boom during February and the expected continuation of this monthly average of \$2 billion (in the absence of the virus), with the exception of the period June to mid-July (outside the tourist peak period), which usually garner about \$700 to 800 million.

6. It is clear from the crises that the demand shock has a much greater impact than the supply shock as a result of some countries banning their citizens from traveling to Egypt.

The following table presents possible scenarios for the tourism activity and revenue in the Egyptian case, according to the above-mentioned crisis cycle and in the context of the above-mentioned assumptions:

Stage	Demand and/or Supply Shock	Analysis	Impact on Tourism Revenue
Emergence of the virus (December 2019 to January 2020)	There is no shock on the demand and supply sides	<ul style="list-style-type: none"> - The crisis is confined to China only. - The virus has not yet spread to European and Arab markets, being key sources of tourists to Egypt. - As for China, it is not one of the big markets for Egypt, though 	<ul style="list-style-type: none"> - There is no negative impact on the tourism activity in Egypt during this period. - The sector posted revenues estimated at about \$2 billion, as the sector achieved an average of \$1 billion in monthly revenue for the

Stage	Demand and/or Supply Shock	Analysis	Impact on Tourism Revenue
		targeted. Therefore, it did not affect tourism during this period.	previous fiscal year and continued at the same rate of growth during December and January.
Beginning of proliferation (February through mid-March 2020)	A slight shock on the demand and supply sides, started only as of the second week of March	<ul style="list-style-type: none"> - The crisis has reached European and Arab countries. - But Egypt was not affected by the crisis, and tourism activity continued normally. - February achieved the highest tourist return compared to previous years (\$2 billion). - The first week of March posted revenue that is half a 	There were no losses in the sector, as tourism revenue was achieved for the period by about \$2.5 billion, although tourism revenue in March decreased by 75% compared to the expected figure.

Stage	Demand and/or Supply Shock	Analysis	Impact on Tourism Revenue
		<p>billion dollars less than expected, albeit close to the corresponding monthly revenue in the previous year.</p> <ul style="list-style-type: none"> - Beginning with the second week of March, panic rose, and tourism activity in Egypt began to decline. - 70-80% of future reservations were canceled and many tourist villages closed due to lack of occupancy. - Tourist companies have not 	

Stage	Demand and/or Supply Shock	Analysis	Impact on Tourism Revenue
		<p>obtained their dues from abroad, and consequently delayed payment to hotels.</p>	
<p>The two stages of: Aggravation of the problem, and crisis receding: Mid- March- August 2020</p>	<ul style="list-style-type: none"> - Violent demand and supply shocks to the point of paralysis. 	<ul style="list-style-type: none"> - Panic rises worldwide and the disease spreads in countries that are key sources of tourists to Egypt (especially Italy, Spain and Germany). - Spain canceled 40% of its reservations to Egypt in March. - Suspension of flights to and from Egypt and in many countries of the world, including 	<ul style="list-style-type: none"> - A significant negative impact is expected with an estimated loss of \$6 billion (as an actual revenue of about \$10.7 billion was already achieved during the first three quarters (July 2019 - March 2020)), and then the tourist movement will come to a complete stop, compared to the estimated revenue of about \$16.7 billion

Stage	Demand and/or Supply Shock	Analysis	Impact on Tourism Revenue
		European and Arab countries. - Absence of any new tourist reservations. - Announcing the curfew in Egypt and in many other countries.	which was expected in the fiscal year 2019/2020. - This means a loss of 35% of the tourism revenue that was expected to be posted in 2019/2020.
Recovery (As of September 2020)	- Tourism paralysis continues both globally and in Egypt until at least June 2021. ⁶	- Recovery from the virus will be mainly accompanied by recovery of the production sectors (industry, agriculture, ...) mainly, not the tourism sector, because it is an entertainment activity, and	- The negative impact on the tourism sector continues. - Tourism revenue is zero. - The loss in tourism revenue is estimated at \$18.4 billion (the same revenue that was expected for

⁶ In its report issued on March 17, 2020, the World Economic Forum expects the global tourism sector to recover and return to normal 10 months after controlling the spread of the virus.

Stage	Demand and/or Supply Shock	Analysis	Impact on Tourism Revenue
		priority will be to other activities. - Aviation will return via business and cargo flights, not tourism.	fiscal year 2020/2021). ⁷

Source: Prepared by the Egyptian Center for Economic Studies.

Surely, any decrease in tourism revenue means a decline in one of the most important sources of foreign exchange, and a deficit in the balance of payments and foreign exchange reserves, assuming that the rest of the monetary resources have not changed and this is an unrealistic assumption. Therefore, the effect is expected to be more violent in the context of interlinkages among the sectors and the expected negative effects on other foreign exchange sources. The size of the deficit in the balance of payments and in the reserves will also be greater. This means that the State should direct its efforts to promoting exports and investments in general.

⁷ The expected loss/revenue for the year 20/21 was calculated on the assumption of an average annual growth rate of 10% similar to the usual (outside crisis years).

Third: Interventions required to mitigate the effects of the crisis

Immediate measures must be put in place to help the tourism sector overcome the spread of this pandemic so that the sector can recover quickly, and prevent this temporary crisis from causing serious problems that may last for years such as the bankruptcy and layoffs of many workers in the sector. The most important proposed measures are as follows:

- Alleviating the burden on affected people by extending the deadlines for the payment of corporate taxes, real estate taxes and other taxes; and extending the maturities of loans and rescheduling them without interest, provided that these facilities extend for a period of at least a year after the return of tourism activity to normal.
- Availing financing incentives to rehabilitate tourist facilities:
 - Activating the Emergency Aid Fund to infuse the sector with liquidity to meet the necessary expenses of salaries, rents and utilities, provided that they are repaid interest-free one year from the return of tourism activity.
 - Activating the tourism investment fund in partnership between the Ministry of Tourism and the private sector "Papyrus"

- Commercial mall owners to exempt tenants listed in the commercial register, including restaurants and cafes, from the monthly rent for a period of 6 months
- The Social Security Authority to exempt tourism establishments from paying social insurance, both employer and employee shares, in Form 2 for a period of 6 months.
- Exempting tourist establishments from paying electricity, water and natural gas bills.
- Sterilization of all tourist establishments with emphasis on the application of health and hygiene standards (already announced), along with implementing a mechanism for continuous follow-up and inspection in all tourist establishments. Civil society organizations can participate so that Egypt becomes a "Hygiene Clean Destination."
- Conducting intensive training courses for workers in the sector to ensure their skills are maintained and prevent them from leaving the tourism sector to other sectors.
- Continued promotion of Egypt as an international tourist destination, especially the Grand Museum, which is scheduled to open before the end of this year.

Within the framework of efforts of the Egyptian government to reduce the negative effects of the Corona virus on the Egyptian economy, the Government has taken a number of appropriate decisions and measures,⁸ which are in the interest of the tourism sector in Egypt and could provide it with the needed support. However, details and mechanisms of application are still unclear, which causes concern among the tourist community about the future of the sector.

Fourth: Institutional weaknesses revealed by the crisis⁹

The crisis revealed institutional imbalances in the tourism sector in Egypt, as shown in the following table, which proposes a number of measures to remedy these imbalances:

Weakness	Proposed Measure
Overlapping mandates between setting policies, implementing them, and monitoring the performance of the sector	Undertaking institutional development that achieves a clear separation between the three tasks, to ensure the relevance and quality of decisions and actions taken.
Multiple supervisory authorities for tourist facilities (about 32) and poor coordination between them.	Identify one entity for oversight that communicates and coordinates with other entities.

⁸ See the end of this report for a list of these measures.

⁹ This report addresses the most important proposed measures to restructure the sector. There is a more comprehensive discussion of these and other measures in the report prepared by the Egyptian Center for Economic Studies in 2018 “Proposed Roadmap for the Development of Tourism in Egypt”. The report can be found at the following link http://www.eces.org.eg/cms/NewsUploads/Pdf/2018_12_15-12_43_91c2e8573.pdf

Weakness	Proposed Measure
Lack of clarity of vision of the crisis management committee	Clarify the terms of reference and mechanisms of the crisis management committee between the Federation of Chambers of Tourism and the ministries of tourism, aviation, airports and other relevant authorities to avoid conflicting decisions and ensure their implementation.
The absence of a sustainable sectoral strategy that does not change with the change of leaders in the Ministry of Tourism, provided it is formulated in cooperation with sector experts.	An agreement has already been announced by the Federation of Tourism Chambers to prepare a long-term strategy for the development of the tourism sector, though the institutional mechanisms must be announced to ensure implementation and sustainability of this strategy.
Lack of an accurate system for monitoring the performance of the declared strategies and issued decisions.	Follow up on sector performance through the Parliament's Tourism and Culture Committees, civil society and the private sector, to ensure: <ul style="list-style-type: none"> - Achieving the quantitative, qualitative and safety objectives of the policies and measures taken by the State - Applying the decisions correctly, as there are many decisions that are intrinsically sound but face difficulties on the ground.
The lack of a sector-specific database.	Ensure the availability of updated data for the sector as a whole and its sub-sectors, provided that they are available in a transparent and regular manner to

Weakness	Proposed Measure
	the tourism business community to contribute to building the technical capabilities of the sector.
Weak level of many Egyptian hotels, especially four- and three- star hotels.	Rehabilitation of hotels in accordance with “New Norms N.N” to keep pace with international standards in competition, so that rating criteria include fixed components of the hotel along with a number of variable criteria such as the method of service provided and environmental and health standards.

Annex

The most important official decisions taken to reduce the negative repercussions of the Coronavirus, directly and indirectly related to the tourism sector (chronologically from the most recent)

Date	Decision
March 22	The President’s decision to launch an initiative to replace and renew tourist hotels

	and tourism transportation fleets and to postpone company dues.
March 22	With regard to workers in hotel establishments, the Egyptian Federation of Tourist Chambers affirmed a commitment to continue to pay salaries to employees and provide them with accommodation, in addition to donating to purchase 160,000 units to conduct a rapid medical examination for workers in the tourism sector, and reduce the daily presence of workers in Cairo and Giza hotels by 50%.
March 22	With regard to procedures for sterilizing hotel and tourist establishments, the Ministries of Tourism and Antiquities have contracted with two international companies specialized in the field of health and safety with the purpose of passing through all hotel establishments nationwide, to ensure the application of correct sterilization steps in hotels and ensure their effectiveness, as well as to prepare procedures and checklists for sterilization operations in hotel facilities, and conduct simulation models to deal with the spread of infection in hotel establishments.
March 22	The Ministries of Tourism and Antiquities shall avail health awareness measures to the various workers in hotels, in order to ensure dissemination of this health information on a large scale to workers in tourism.
March 22	The Federation shall communicate with the International Expert House to agree on preparing a long-term strategy for the development of the tourism sector.

March 19	With reference to the initiatives launched by the Central Bank of Egypt in connection with financing the manufacturing private sector (on December 12, 2019), real estate financing for middle-income groups (on December 19, 2019), and supporting the replacement and renewal of hotels, floating hotels, and tourism transportation fleets (on January 8, 2020), it was decided to amend the interest rate for the above initiatives to become 8% (calculated on a decreasing basis) instead of 10%.
March 19	Prime Minister's decision to close restaurants, cafes, cafeterias, casinos, cabarets, nightclubs and commercial centers from 7 pm to 6 am until March 31. The decision does not apply to bakeries, grocery stores, pharmacies and supermarkets, whether in or outside the commercial centers.
March 19	Stop domestic tourism for 14 days in four governorates to prevent the spread of Coronavirus.
March 18	Close all land ports in South Sinai to face Coronavirus.
March 18	Preventing the departure of any of the crews working in the tourist establishments in three governorates, namely: Luxor, Aswan and South Sinai.
March 18	Full stamp duty exemption for spot operations to stimulate daily transaction volumes.
March 18	Reducing all expenses of the stock exchange, Misr for Central Clearing,

	Financial Supervisory Authority, and the Investor Protection” Fund.
March 18	Reducing subscription to the Investor Protection Fund for securities trading operations on the Egyptian Stock Exchange by 50%.
March 17	Extending the period of submission of financial statements for companies whose securities are listed on the stock exchange and companies subject to supervision of the Authority for the financial period ending on December 31, 2019 to April 30, 2020 and the period ending March 31, 2020 to June 15, 2020.
March 17	Suspending shows held in cinemas and theaters.
March 17	Postponing the payment of real estate tax due on factories and tourist establishments for a period of 3 months, and allowing the payment of the real estate tax due on factories and tourist facilities in installments for previous periods, through monthly installments for a period of 6 months.
March 17	Lifting administrative seizure on all taxpayers who have a payable tax against payment of 10% of the tax due and re-settling the files of these taxpayers through dispute settlement committees.
March 16	The Central Bank launches a new initiative for individual clients in default: According to this initiative, all accumulated interest is waived and all lawsuits filed between the bank and client with the courts are relinquished immediately after agreeing on payment terms, in addition to lifting the ban on them and the release of guarantees

	and mortgages for these debts when the customer pays 50% of the net debt balance during the period up to March 31, 2021. In addition, clients who made payments before September 30, 2019 shall benefit from the same terms of the initiative in the framework of the initiatives launched by the Central Bank recently in connection with legal persons in default.
March 16	The Central Bank's decision to postpone the payment of all liabilities and loan installments, even personal ones, for a period of 6 months.
March 16	The suspension of air traffic in all Egyptian airports from 19 to 31 March.
March 16	The meeting of the Ministers of Tourism and Antiquities and the Minister of Civil Aviation and affirming that the Egyptian airspace will not be closed during the period of suspension and that Egyptian airports will continue to receive charter and regular flights (without passengers) in order to allow tourist delegations present in Egypt to complete their tourism programs and return to their countries on their scheduled travel dates, without bringing in any new delegations during the flight suspension period.
March 16	The Central Bank's decision to reduce its policy rate by 300 basis points, so that the overnight deposit and lending rate and the rate of the main operation will be 9.25%, 10.25%, and 9.75%, respectively, and the discount rate will be 9.75%.

March 16

The Prime Minister issues guidance to sterilize all hotels and tourist facilities during the period of suspension of tourist trips.

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