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Ex post evaluation of Cohesion Policy programmes 2007-2013, financed by the ERDF and CF

Work Package 4: Support to large enterprises

First Interim Report

**PART B:
Taking stock of support and case study selection**

Version 3.0

Contract N° 2014CE16BAT033

25 February 2015

List of acronyms

Abbreviation	Long form
AT	Austria
CF	Cohesion Fund
CZ	Czech Republic
DE	Germany
ERDF	European Regional Development Fund
ES	Spain
ESF	European Social Fund
EU	European Union
HU	Hungary
IT	Italy
MA	Managing Authority
NACE	European Classification of Economic Activities
OP	Operational Programme
PL	Poland
PT	Portugal
R&D / R+D+I	Research & development; research & development & innovation
ROP	Regional Operational Programme

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1 Country fact sheets

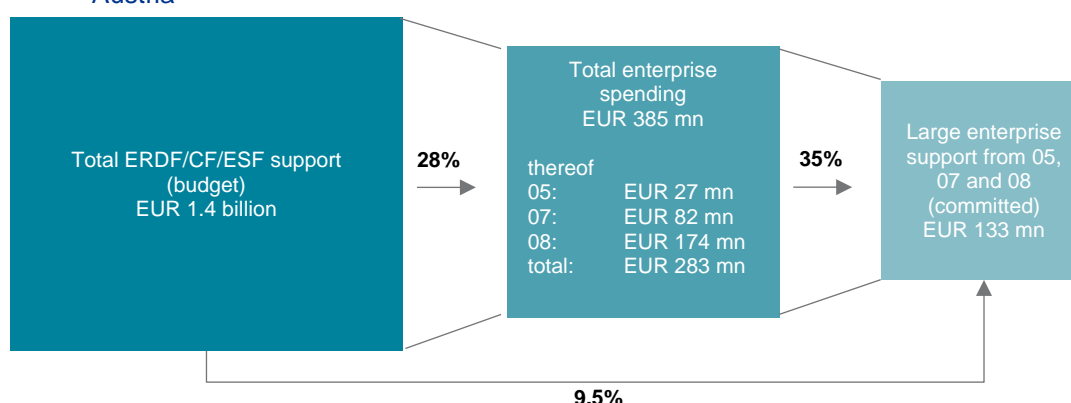
1.1 Austria

1.1.1 Share of large enterprise support

About EUR 1.4 billion of ERDF/CF/ESF funding has been budgeted for Austria in the 2007-2013 programming period. On average over all Austrian Operational Programmes almost 100% of ERDF funding has been committed and around 70% of committed ERDF support has already been paid. Due to a high degree of certainty in the implementation of ongoing projects complete absorption of ERDF funds is expected by the Managing Authorities for the time of programme closure.

28% of the available funds have been committed as enterprise spending, from which 35% has been awarded to large enterprise projects on the 05, 07 and 08 expenditures codes. This results in a 9.5% share of total large enterprise support within the total budget.

1. Figure: Committed support by relevant expenditure codes and large enterprise status in Austria



In Austria nine operational programmes were implemented from ERDF. The large enterprise support from the relevant expenditure codes has been distributed between the following Operational Programmes:

2. Figure: The list of relevant Operational Programmes which included direct enterprise support on 05, 07 and 08 expenditure codes for large enterprises in Austria

Type of Operational Programmes	Relevant Operational Programmes
Regional	<ul style="list-style-type: none"> ■ OP Burgenland 2007-2013: Convergence/Phasing Out ■ OP Carinthia 2007-2013: Regional Competitiveness and Employment ■ OP Lower Austria 2007-2013: Regional Competitiveness and Employment ■ OP Styria 2007-2013: Regional Competitiveness and Employment ■ OP Tyrol 2007-2013: Regional Competitiveness and

Type of Operational Programmes	Relevant Operational Programmes
	Employment <ul style="list-style-type: none"> ■ OP Upper Austria 2007-2013: Regional Competitiveness and Employment ■ OP Vorarlberg 2007-2013: Regional Competitiveness and Employment

The Operational Programmes of Salzburg and Vienna reportedly have not supported large enterprises under expenditure codes 05, 07 and 08.

The average committed large enterprise ERDF support amounts to EUR 16 per capita, EUR 433 per operating enterprise or EUR 121,000 per active large enterprise over the whole programming period.

The form of large enterprise support has been exclusively non-refundable.

Under the expenditure codes 05, 07 and 08, EUR 239 million support (ERDF and national public contribution) has been committed to large enterprises in the 2007-2013 programming period. The share of the national public contribution was 44%, while 56% of the support has been financed from EU funds.

3. Figure: Breakdown of committed large enterprise support into ERDF and national contribution in Austria

Committed support (EUR million)		
ERDF	National contribution	Total
133	106	239

The aid intensity for large enterprises in Austria is an average of 14%: the total investment could reach EUR 1.7 billion. The maximum allowed aid intensity for large enterprises and small and medium-sized enterprises varies depending on the economic strength of the region and enterprise size. In most competitiveness regions the maximum allowed aid intensity for large enterprises is 15% and for small and medium-sized enterprises it is 35%. For the convergence region Burgenland the maximum allowed aid intensity for large enterprises could reach 30%, while for small enterprises it could be 50%.

1.1.2 Key project level figures

The amount of ERDF funds committed for large enterprises (EUR 133 million) has been realized through 194 projects¹. The majority of large enterprise support (62%) in Austria has been committed

¹ In the data request process managing authorities in Austria have not been explicitly asked to include industrial parks, incubator houses, logistic centres and developers of large EU level research projects. Since data has to be provided by the managing authorities these project types could not be included at a later stage of analysis without restarting the data request process from scratch and breaking the scheduled timeline.

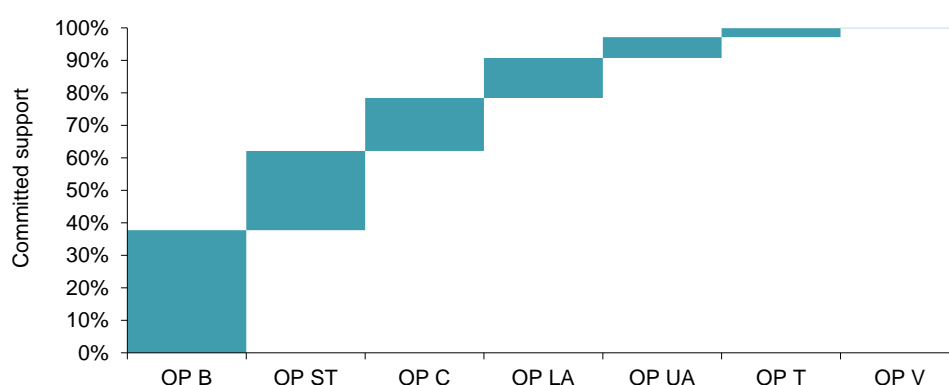
The evaluators believe however that the extent of projects that fall into the above mentioned categories would be very limited in Austria. Funded projects under these categories would most likely be excluded by the other exclusion criteria defined. Beneficiaries in these areas are usually operating on a non-profit basis and/or are owned by public entities. The fact that industrial parks, incubator houses, logistic centres and developers of large EU level research projects have not been explicitly included should therefore not significantly alter the results of the analysis.

by the operational programmes under the regional competitiveness and employment objective. The only Austrian programme under the convergence objective is the Operational Programme Burgenland.

4. Figure: Number of projects and value of committed support to large enterprises by operational programme in Austria

Operational Programme	Committed support	
	ERDF (EUR mn)	nr of projects
OP Burgenland 2007-2013: Convergence/Phasing Out	50	41
OP Carinthia 2007-2013: Regional Competitiveness and Employment	22	32
OP Lower Austria 2007-2013: Regional Competitiveness and Employment	16	27
OP Styria 2007-2013: Regional Competitiveness and Employment	32	72
OP Tyrol 2007-2013: Regional Competitiveness and Employment	4	7
OP Upper Austria 2007-2013: Regional Competitiveness and Employment	8	12
OP Vorarlberg 2007-2013: Regional Competitiveness and Employment	0.1	3
Total	133	194

5. Figure: Distribution of committed support to large enterprises by operational programme in Austria

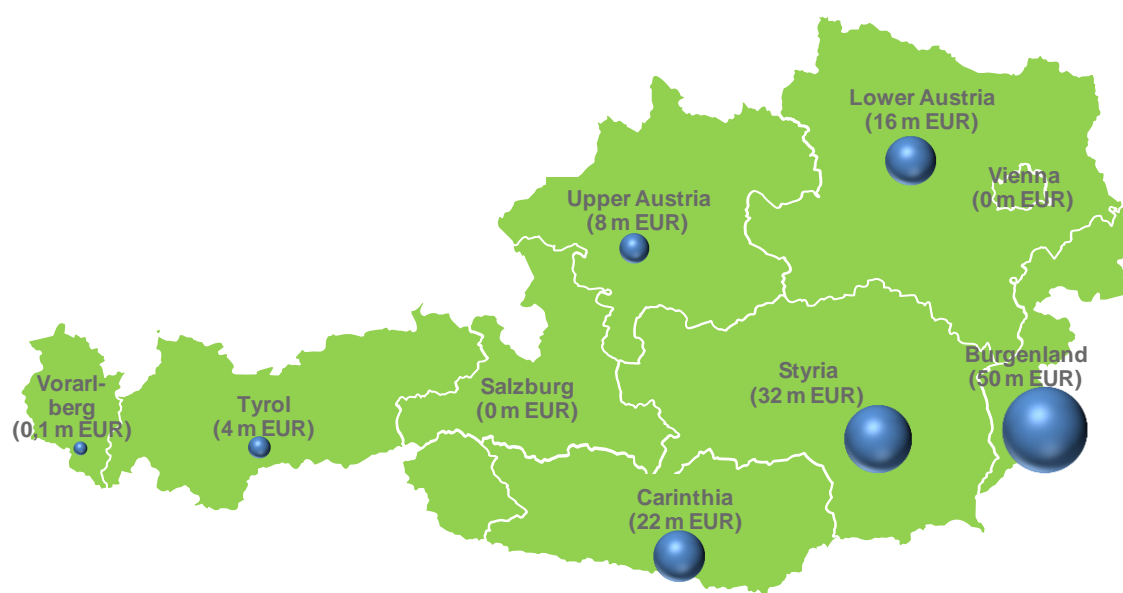


The Austrian support for large enterprises in the specified codes focuses on codes 08 and 07. About 63% of ERDF funds were committed under code 08 and 37% under code 07. All Austrian operational programmes supporting large enterprises provided funding for measures under both codes. Expenditure under code 05 is very limited in Austria: only 4 projects accounting for less than 1% of ERDF funding under the specified codes fall under code 05. Funding under code 05 is concentrated in the Operational Programmes Lower Austria and Styria.

Regional distribution

The regional distribution of large enterprise support in Austria shows that the regions bordering the newer Eastern European Member States directed a higher amount of ERDF funds towards large enterprises than the regions in Western Austria. The Operational Programme Burgenland, the only Austrian programme under the convergence objective, leads expenditure on large enterprises with EUR 50 million dedicated to large enterprises, followed by Styria with EUR 32 million.

6. Figure: Committed support to large enterprises by region in Austria



Convergence regions

21% of the large enterprise projects in Austria have been implemented in the convergence objective region Burgenland. The average financial project volume was more than twice as high in this region and projects showed higher ERDF support rates.

7. Figure: Committed support to large enterprises by regional policy objective in Austria

Committed support		
Regional policy objectives	Number of projects	Average support (EUR mn)
Convergence region	41	1.2
Outside of convergence region	153	0.5

1.1.3 Characteristics of supported large enterprises

Size of supported large enterprises

148 large enterprises have been supported, which equals 7.2% of all large enterprises² in Austria. One firm had 1.3 projects on average, which reveals that occasionally a firm was supported multiple times during the programming period. The average amount of ERDF support per supported large enterprise was EUR 0.9 million. In a few cases several projects for enterprises belonging to the same enterprise group were supported. Clustering according to enterprise groups produces a number of 140 entities.

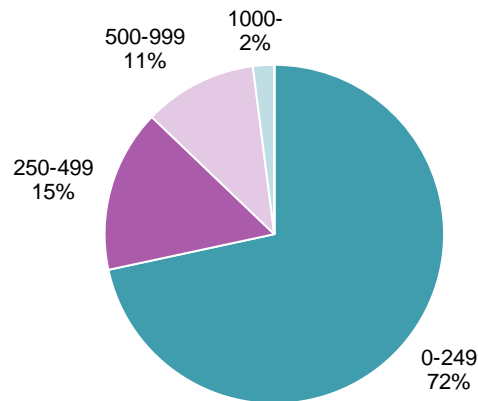
² Based on the number of active large enterprises that fulfill the employee and turnover criteria.

8. Figure: Number of supported large enterprises, average amount of support and number of projects in Austria

Number of supported large enterprises	Average amount of support per firm (EUR mn)	Average number of supported projects per firm
148	0.9	1.3

More than two thirds (72%) of the supported Austrian large enterprises employ less than 250 people at the supported project site. Only 3 of the supported enterprises employ more than 1000 people, with the biggest company employing around 1700 employees at the supported project site.

9. Figure: Distribution of supported large enterprises by employment category in Austria



Sector of supported large enterprises

The following figure shows the breakdown of the committed ERDF support according to NACE sections. Manufacturing is by far the prevailing area of support across all operational programmes with 166 supported projects and 79% of ERDF funds allocated to large enterprises operating in this industry. The second ranking NACE section is 'Accommodation and food service activities' accounting for 12% of ERDF support provided to 16 projects. Support in this area is concentrated however in only three Austrian regions with 14 supported projects in the convergence region Burgenland and one project each in Carinthia and in Upper Austria.

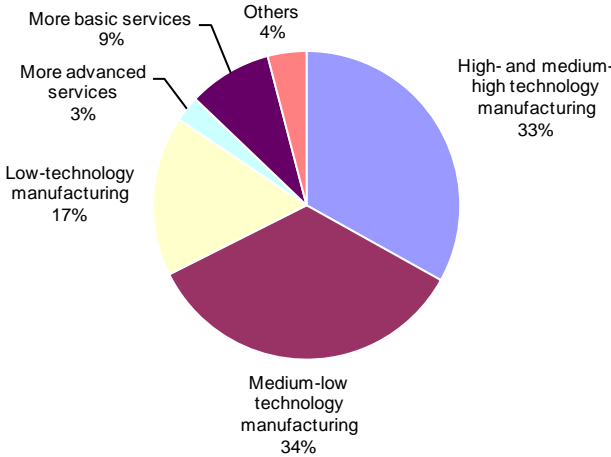
10. Figure: Distribution of total committed support to large enterprises by primary NACE code in Austria (in thousands)



Electricity, gas, steam and air conditioning supply (billy company and a member firm affiliated national), a Swiss entity.

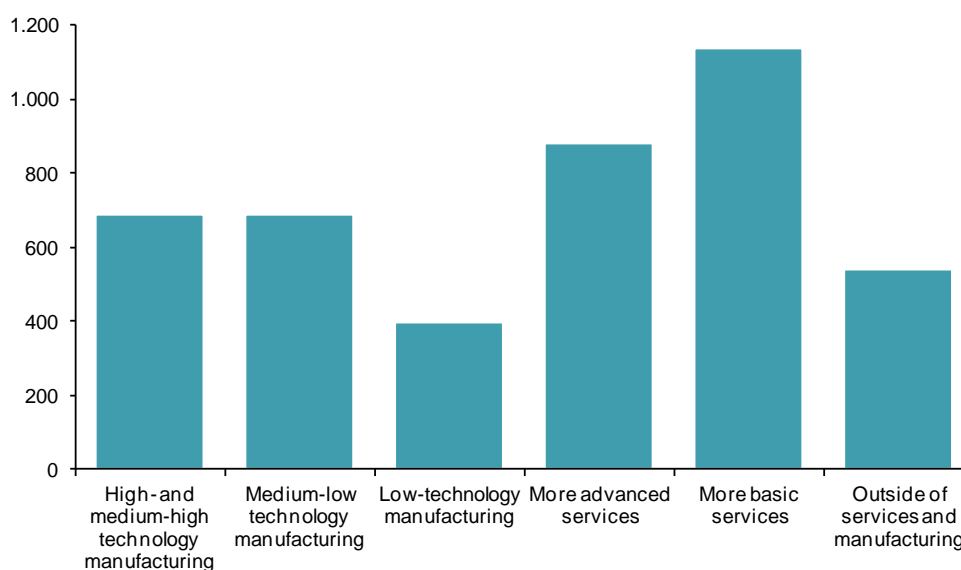
Sectoral categorisation of the large enterprises receiving support from ERDF shows that the enterprises are distributed mainly among high- and medium-high technology manufacturing (33%) and medium-low technology manufacturing (34%). In comparison, the share of low-technology manufacturing enterprises (17%) as well as that of enterprises from the service sectors (12%) among the supported enterprises is relatively low.

11. Figure: Distribution of supported large enterprises by sectoral categorisation in Austria



The average committed support by sector shows that high- and medium-high-technology manufacturers and medium-low technology manufacturers received more support for their projects than low technology manufacturers. In the services sector however the more basic services show higher support volumes than the more advanced services. Part of this finding is explained by the statistical effect of one exceptionally big project in the more basic services sector. Excluding this outlier from the scope of the analysis would bring down the average support per project to about EUR 920,000, which is only slightly higher than corresponding figure measured in the more advanced services sector. Projects in the more basic services sector are almost exclusively associated with tourism and recreational activities and often include substantial construction costs.

12. Figure: Average committed support by sectoral categorisation in Austria (in thousands)



Categorisation based on leadership and geographical coverage

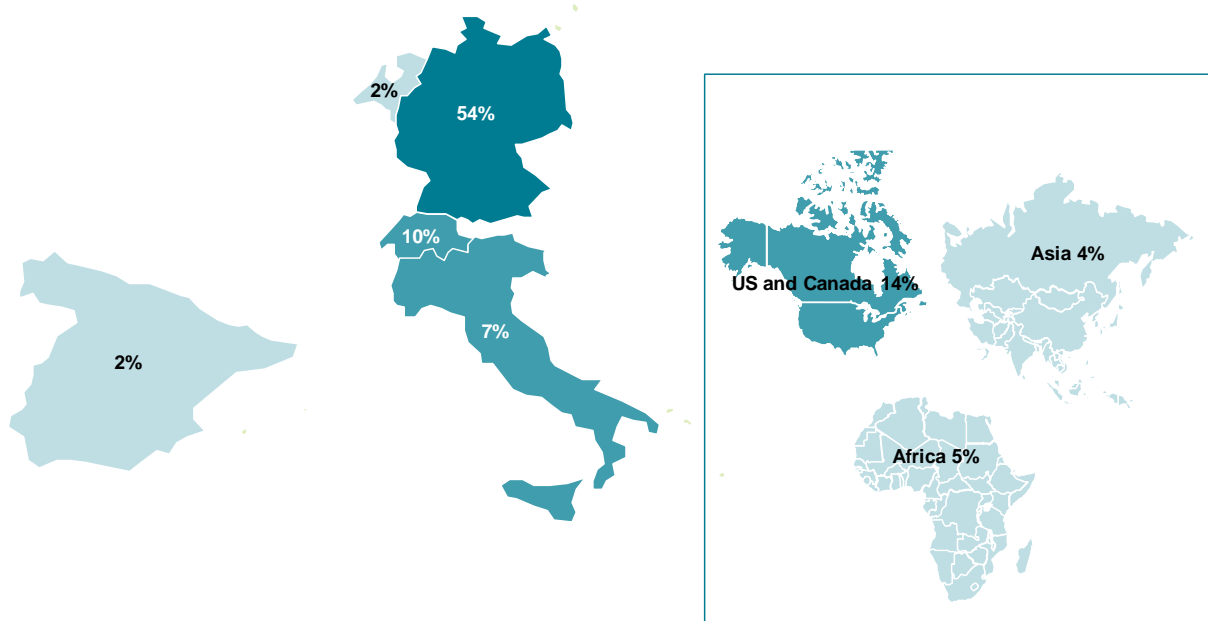
The vast majority (73%) of supported enterprises in Austria operate internationally. Only 40 enterprises were identified as national companies operating only in Austria. Among the 108 enterprises operating internationally 67 (45%) are headquartered in Austria and are therefore considered domestic multinational companies. 41 enterprises (28%) are headquartered or belong to enterprise groups headquartered in a foreign country. Supported multinational companies are usually involved in operations in a large number of countries.

13. Figure: Distribution of supported large enterprises by geographical coverage in Austria

Distribution of large enterprises based on the geographical coverage		
Geographical Coverage	Operation in a large number of countries	Operation in a small number of countries
Foreign multinational companies	34	7
Domestic multinational companies	43	24
National companies	40	
Total	148	

The most common country of origin of foreign multinational companies in Austria is Germany. A few enterprises (some of which belong to the same enterprise group) are headquartered in Switzerland, the United States, Canada and South Africa. Single cases were also found for companies with headquarters in the Netherlands, Spain, Japan and Singapore.

14. Figure: Distribution of supported large enterprises by country of origin in Austria



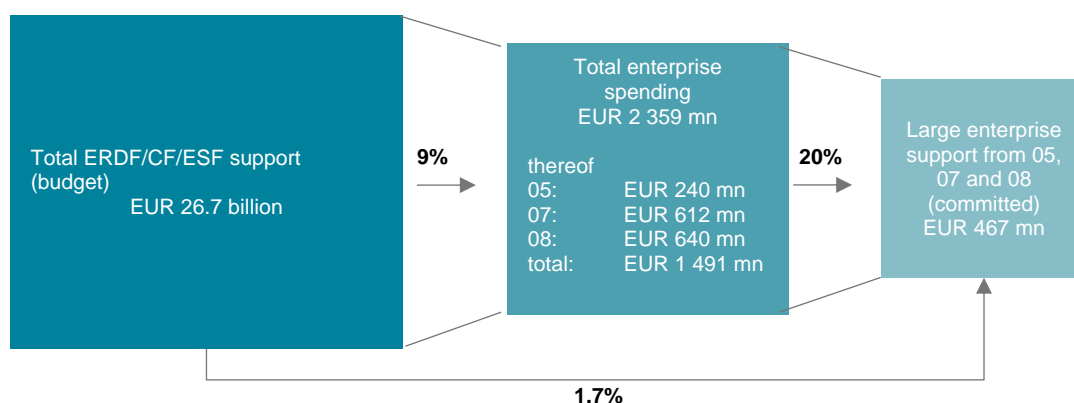
1.2 Czech Republic

1.2.1 Share of large enterprise support

More than EUR 26.7 billion of ERDF/CF/ESF funding has been budgeted for the Czech Republic in the 2007-2013 programming period. The total committed amount at the end of 2013 was EUR 24.4 billion.

1.7% of the budget has been accounted on the relevant expenditure codes to large enterprises in the Czech Republic.

15. Figure: Committed support by relevant expenditure codes and large enterprise status in the Czech Republic³



In the Czech Republic seventeen operational programmes have been implemented. The large enterprise support from the relevant expenditure codes has been supported only by the Operational Programme Enterprise and Innovation.

16. Figure: The list of relevant Operational Programmes which included direct enterprise support on 05, 07 and 08 expenditure codes for large enterprises in the Czech Republic

Type of Operational Programmes	Relevant Operational Programmes
Sectoral	<ul style="list-style-type: none"> Operational Programme Enterprise and Innovation

The average committed large enterprise support amounts to EUR 44.5 per capita, EUR 416 per operating enterprise in the whole programming period.

Refundable support targeted small and medium enterprises, therefore the form of large enterprise support was exclusively non-refundable.

EUR 467 million support has been committed to large enterprises in the 2007-2013 programming period from ERDF funds. The share of national contribution is 15% for all Czech operational programmes, which means that 85% of support has been financed from EU funds.

³ Source: Annual Implementation Report raw database

17. Figure: Breakdown of committed large enterprise support into ERDF and national contribution in the Czech Republic

Committed support (EUR mn)		
ERDF	National contribution	Total
467	82	549

The aid intensity for large enterprises in the Czech Republic is maximum 40%⁴; the total investment could reach EUR 1.4 billion. The maximum aid intensity for large enterprises could reach 40%, while that for small and medium-sized enterprises could be 60%.

1.2.2 Key project level figures

The amount of ERDF funds committed for large enterprises (EUR 467 million) has been realized through 520 projects. 50% of the committed support has already been paid. The following figure presents data regarding the **Operational Programme Enterprise and Innovation**, the only one in the Czech Republic, in which large enterprises have been supported from ERDF 05, 07 and 08 expenditure codes.

18. Figure: Number of projects and value of requested, committed, contracted and paid support to large enterprises by operational programme in the Czech Republic

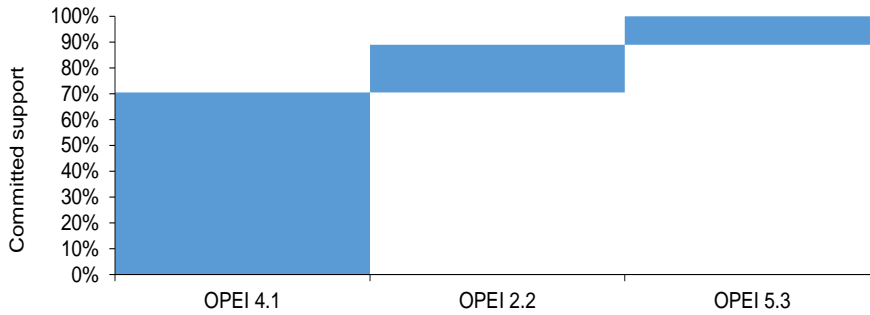
Operational Programme	Requested support		Committed support ⁵		Paid support	
	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects
OP Enterprise and Innovation	525	588	467	520	232	330

Three measures in the Operational Programme Enterprise and Innovation supported large enterprises. 70% of the funds have been awarded from the 4.1 measure. This primary measure involves several areas of support. This includes software development centres, shared services centres with a strong international focus, as well as repair centres of high-tech products and technologies.

⁴ The 40% is the maximum share of support, thus the total investment is the maximum estimation.

⁵ Based on the terminology of the Czech Managing Authorities, the amount covered by decision or grant agreement. Committed and contracted amounts cannot be distinguished.

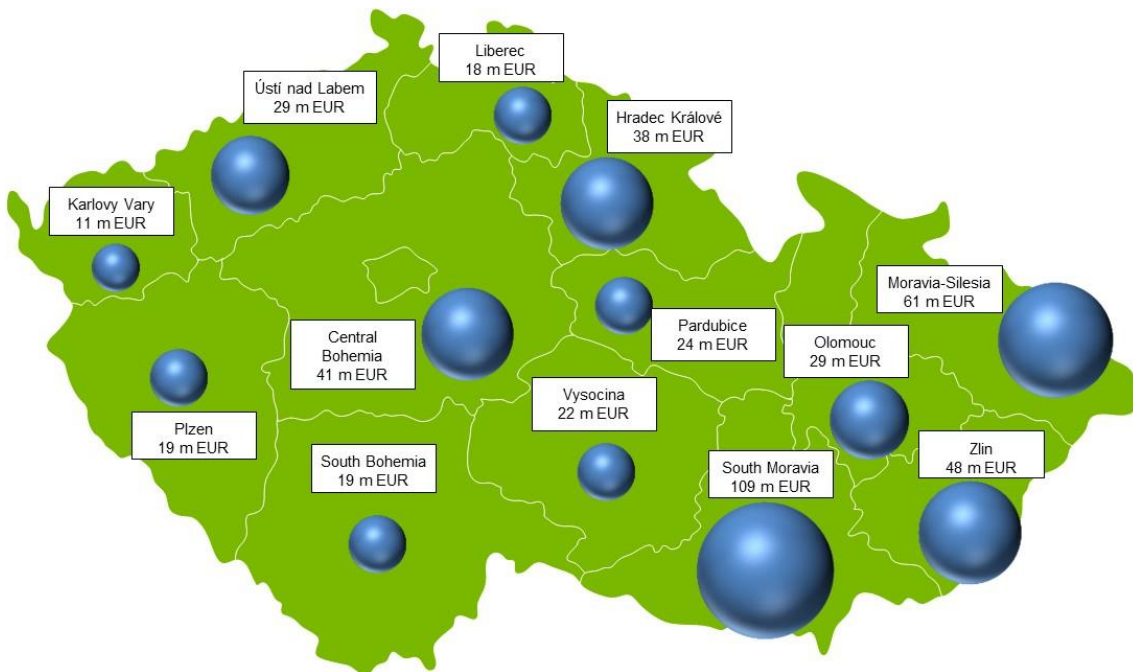
19. Figure: Distribution of committed support to large enterprises by measure in the Czech Republic



Regional distribution

Four regions emerge in terms of committed large enterprise support, while two of the southern regions are falling behind. It should be noted that the most developed Prague region is not represented as the funds of the Operational Programme Enterprise and Innovation have not been available for the applicants located in this region.

20. Figure: Committed support to large enterprises by region in the Czech Republic



1.2.3 Characteristics of supported large enterprises

Size of supported large enterprises in the Czech Republic

339 large enterprises have been supported, which corresponds to 22% of the active large enterprises in the Czech Republic. One firm had 1.5 projects on average, which reveals that occasionally a firm applied multiple times during the programming period. The average amount of ERDF support has been nearly EUR 1.4 million per supported large enterprise.

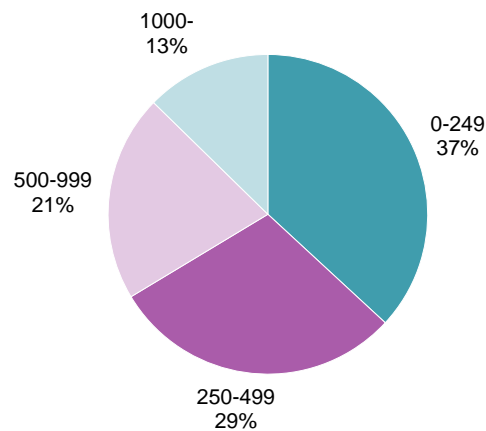
21. Figure: Number of supported large enterprises, average amount of support and number of

Number of supported large enterprises	Average amount of support per firm (EUR mn)	Average number of supported projects per firm
339	1.4	1.5

projects in the Czech Republic

37% of the supported large enterprises employ less than 250 people (but still considered as large enterprises based on self-declaration). Only 13% of the supported enterprises employ more than 1000 people.

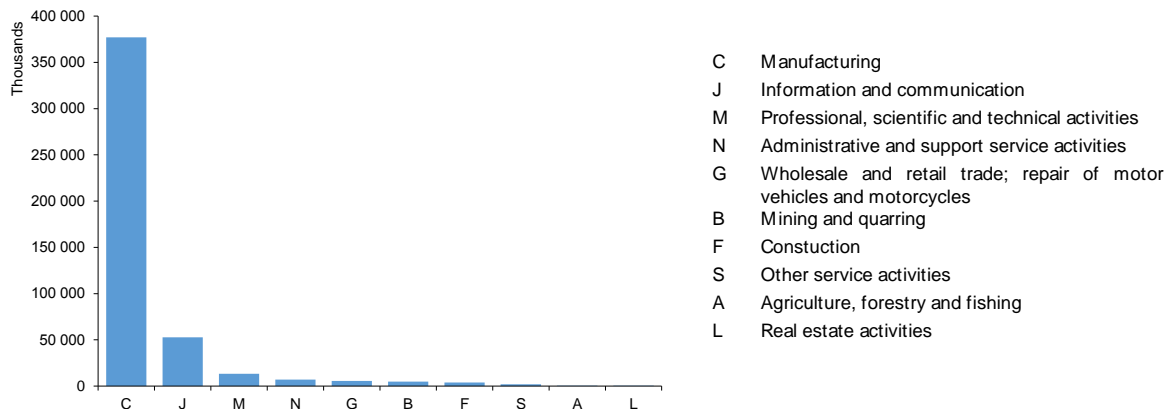
22. Figure: Distribution of supported large enterprises by employment category in the Czech Republic



The following figure shows the industrial breakdown of the committed support. The manufacturing industry is the most relevant destination of the support, receiving nearly 80% of the overall funding. This amount is significantly higher than those gained by the second and third largest recipient industries, namely the information and communication and the professional, scientific and technical activities.

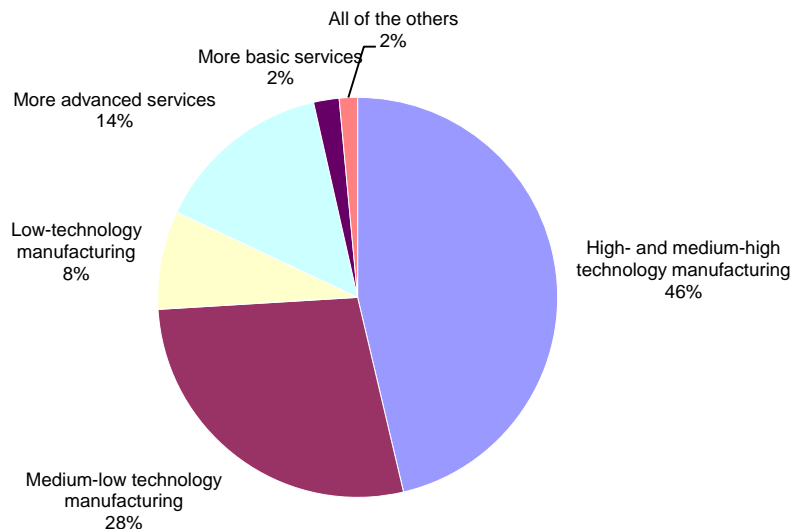
Sector of supported large enterprises

23. Figure: Distribution of total committed support to large enterprises by primary NACE code in the Czech Republic



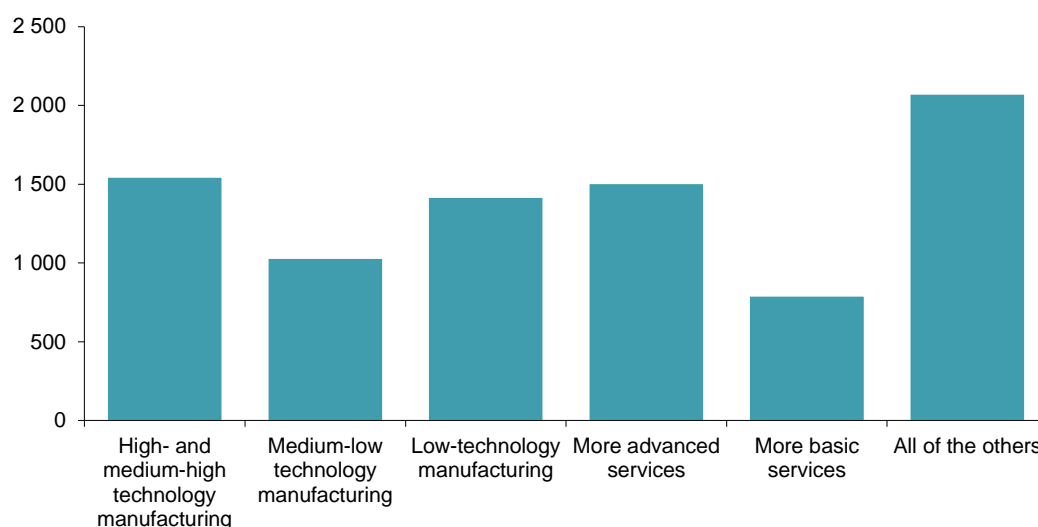
The next pie chart shows the sectoral categorisation of the large enterprises receiving support from ERDF. 46% of the supported large enterprises are high- and medium-high technology firms. In comparison, the share of service provider enterprises is relatively low: only 16%. Just 2% of the supported large enterprises' primary economic activity falls outside of services and manufacturing.

24. Figure: Distribution of supported large enterprises by sectoral categorisation in the Czech Republic



The average committed support by sector confirms the intuition that more advanced service providers invest in larger projects than more basic service providers. In the case of manufacturing, however, the average support has been nearly the same for high- and medium-high technology and for low-technology manufacturing enterprises.

25. Figure: Average committed support by sectoral categorisation in the Czech Republic (in thousands)



Categorisation based on leadership and geographical coverage

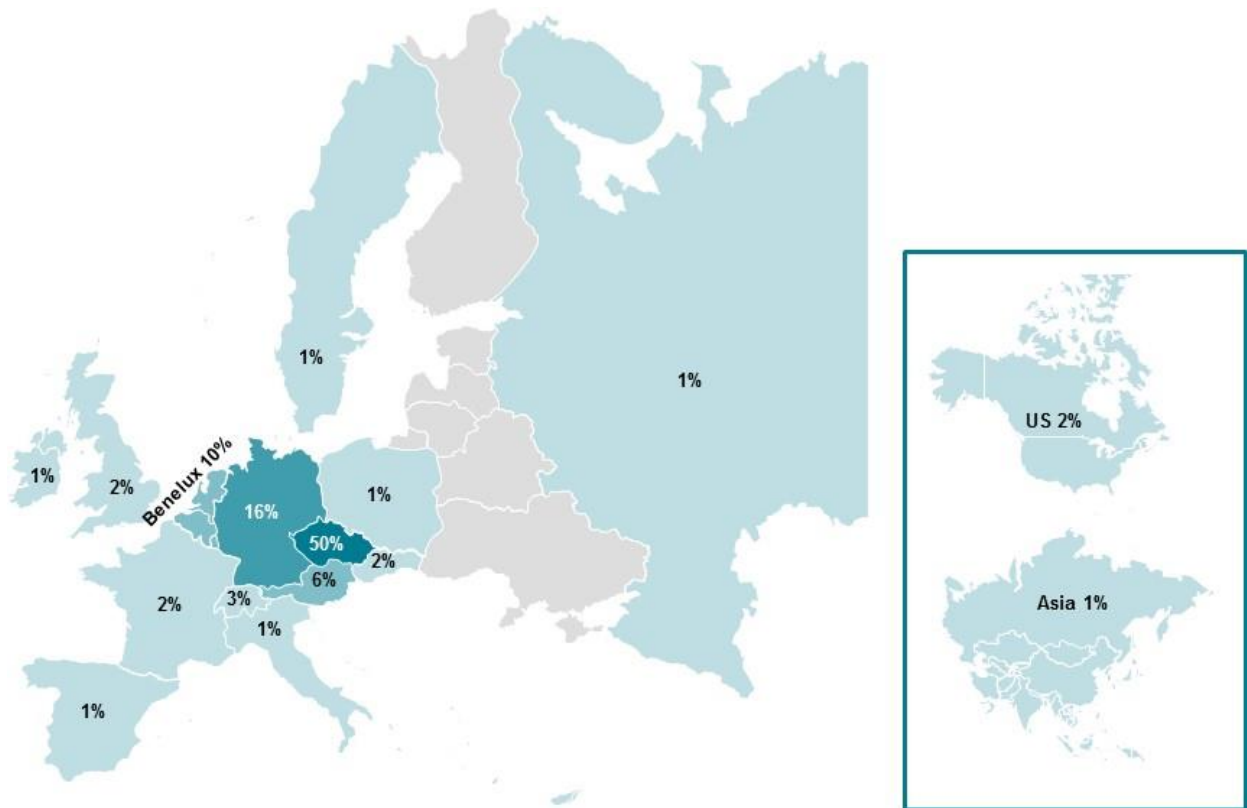
There are no classic domestic multinational companies among the supported large enterprises. This does not necessarily mean that ERDF support is less popular among them, but rather that their overall number in the Czech Republic is very low. The slight majority of supported large enterprises are multinational companies with a primary residence outside of the country.

26. Figure: Distribution of supported large enterprises by geographical coverage in the Czech Republic

Distribution of large enterprises based on the geographical coverage		
Geographical Coverage	Operation in a large number of countries	Operation in a small number of countries
Foreign multinational companies	20	160
Domestic multinational companies	0	0
National companies	159	
Total	339	

The following map shows the percentage of supported large enterprises according to their ownership in different countries. The map depicts data of 321 large enterprises. For 18 enterprises the information about the ownership was not accessible. 50% of supported large enterprises can be categorised as domestically owned, while 16% of them are headquartered in Germany, Czech Republic's primary trade and business partner.

27. Figure: Distribution of supported large enterprises by country of origin in the Czech Republic



Foreign direct investment support to large enterprises

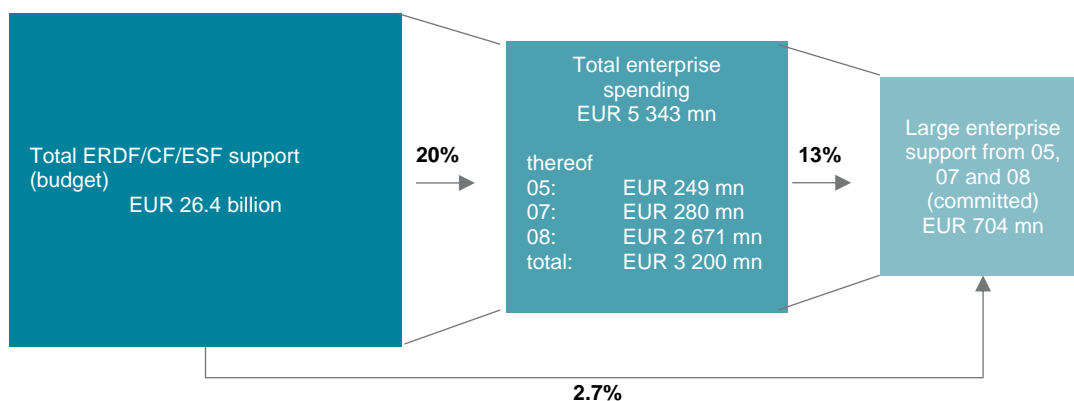
In the Czech Republic foreign direct investment support to large enterprises is provided mainly from the national Investment Incentives Scheme. For companies/investment projects that for any reason do not fulfil the criteria for the national Investment Incentives Scheme, other forms of support are available from the Operational Programme Enterprise and Innovation. None of the schemes are directly focused on foreign direct investment support, nevertheless, 55 potential foreign direct investment projects could be identified based on project titles.

1.3 Germany

1.3.1 Share of large enterprise support

About EUR 26.4 billion of ERDF/CF/ESF funding has been budgeted for Germany in the 2007-2013 programming period. 20% of the available funds have been committed as enterprise spending, from which 13% has been awarded to large enterprises on the relevant expenditure codes. This results in a 2.7% share of total large enterprise support within the total budget. On average, over all German operational programmes around 75% of committed ERDF support for large enterprises has already been paid out.

28. Figure: Committed support by relevant expenditure codes and large enterprise status in Germany



In Germany eighteen operational programmes were implemented from ERDF. The large enterprise support from the relevant expenditure codes has been distributed between the following operational programmes:

29. Figure: The list of relevant Operational Programmes which included direct enterprise support on 05, 07 and 08 expenditure codes for large enterprises in Germany

Type of Operational Programmes	Relevant Operational Programmes
Regional	<ul style="list-style-type: none"> ■ OP Berlin 2007-2013: Regional Competitiveness and Employment ■ OP Brandenburg 2007-2013: Convergence ■ OP Bremen 2007-2013: Regional Competitiveness and Employment ■ OP Hesse 2007-2013: Regional Competitiveness and Employment ■ OP Lower Saxony 2007-2013: Regional Competitiveness and Employment ■ OP Mecklenburg-West Pomerania 2007-2013: Convergence ■ OP North Rhine-Westphalia 2007-2013: Regional Competitiveness and Employment ■ OP Saxony 2007-2013: Convergence ■ OP Saxony-Anhalt 2007-2013: Convergence ■ OP Schleswig-Holstein 2007-2013: Regional Competitiveness

Type of Operational Programmes	Relevant Operational Programmes
	and Employment ■ OP Thuringia 2007-2013: Convergence

The Operational Programmes of Baden-Württemberg, Bavaria, Hamburg, Saarland and Lower Saxony (Luneburg/Convergence objective) reported not having supported large enterprises under expenditure codes 05, 07 and 08. Rhineland-Palatinate did not provide the requested data. The national operational programme on transport infrastructure was not directed towards direct enterprise support.

The average committed large enterprise ERDF support amounts to EUR 9 per capita, EUR 194 per operating enterprise and EUR 58,000 per large enterprise over the whole programming period.

The form of large enterprise support has been non-refundable.

Under the expenditure codes 05, 07 and 08 EUR 1.103 million support (ERDF and national public contribution) has been committed to large enterprises in the 2007-2013 programming period. The share of the national public contribution is 36% with 64% of support financed from EU funds.

30. Figure: Breakdown of committed large enterprise support into ERDF and national contribution in Germany

Committed support (EUR mn)		
ERDF	National contribution	Total
704	399	1.103

Taking into account the private contribution of the enterprises, the aid intensity for large enterprises in Germany is an average of 28%, while the total investment could reach EUR 3.9 billion. The maximum allowed aid intensity varies depending on the economic strength of the region and the size of the enterprise. It can vary between 15% for large enterprises and 35% for small enterprises in competitiveness regions and 30% for large enterprises and up to 50% for small enterprises in the most disadvantaged convergence regions.

1.3.2 Key project level figures

The amount of ERDF funds committed for large enterprises (EUR 704 million) has been realized through 763 projects.⁶ The vast majority of large enterprise support (93%) in Germany has been committed by the operational programmes in the new Länder under the convergence objective. The

⁶ In the data request process managing authorities in Germany have not been explicitly asked to include industrial parks, incubator houses, logistic centres and developers of large EU level research projects. Since data has to be provided by the managing authorities, these project types could not be included at a later stage of analysis without restarting the data request process from scratch and breaking the scheduled timeline.

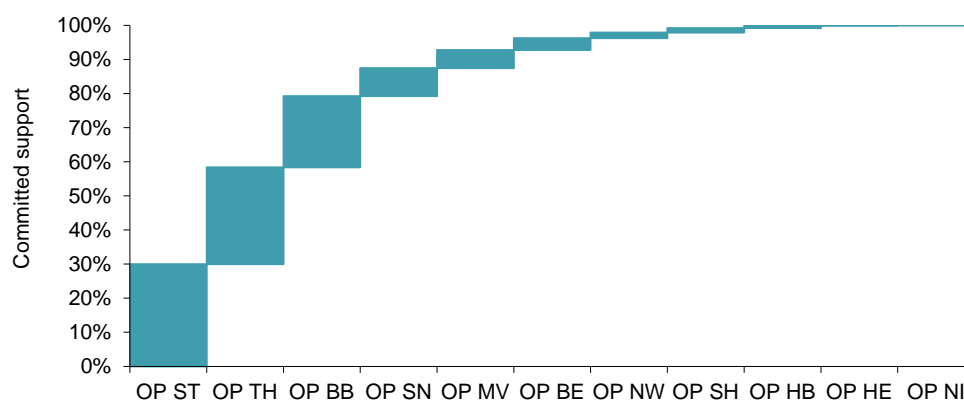
The evaluators believe however that the extent of projects that fall into the above mentioned categories would be very limited in Germany. Funded projects under these categories would most likely be excluded by the other exclusion criteria defined. Beneficiaries in these areas are usually operating on a non-profit basis and/or are owned by public entities. The fact that industrial parks, incubator houses, logistic centres and developers of large EU level research projects have not been explicitly included should therefore not significantly alter the results of the analysis.

Operational Programmes Saxony-Anhalt and Thuringia accounted (with about 30% each) for the highest shares of ERDF support to large enterprises under the specified codes.

31. Figure: Number of projects and value of committed support to large enterprises by operational programme in Germany

Operational Programme	Committed support	
	ERDF (EUR mn)	nr of projects
OP Berlin 2007-2013: Regional Competitiveness and Employment	25	46
OP Brandenburg 2007-2013: Convergence	147	95
OP Bremen 2007-2013: Regional Competitiveness and Employment	5	3
OP Hesse 2007-2013: Regional Competitiveness and Employment	0.3	1
OP Lower Saxony 2007-2013: Regional Competitiveness and Employment	0.1	2
OP Mecklenburg-West Pomerania 2007-2013: Convergence	38	81
OP North Rhine-Westphalia 2007-2013: Regional Competitiveness and Employment	11	36
OP Saxony 2007-2013: Convergence	58	52
OP Saxony-Anhalt 2007-2013: Convergence	211	187
OP Schleswig-Holstein 2007-2013: Regional Competitiveness and Employment	9	8
OP Thuringia 2007-2013: Convergence	200	252
Total	704	763

32. Figure: Distribution of committed support to large enterprises by operational programme in Germany



The German support for large enterprises in the specified codes focuses largely on code 08. About 94% of ERDF funds were committed under code 08, only 6% under code 07 and less than one percent under code 05. All operational programmes supporting large enterprises include a common type of intervention, supporting productive investment (Einzelbetriebliche Investitionsförderung). This intervention is often combined with national funding under the Joint Agreement for the Improvement of Regional Economic Structures (Gemeinschaftsaufgabe zur Verbesserung der regionalen Wirtschaftsstruktur). The only region using calls for project selection is North Rhine-Westphalia. The calls address cluster themes, such as e.g. “automotive + production” or “micro and nano technologies + materials”.

Within the specified codes only three operational programmes support large enterprises with additional measures not falling under code 08. The Operational Programmes Thuringia, Berlin and North Rhine-Westphalia support research and technology development and innovation projects (Einzelbetriebliche Technologieförderung) under code 07. Berlin and North Rhine-Westphalia also support very few projects under code 05. Talks with managing authorities revealed however that in some operational programmes similar measures were categorized under different expenditure codes. As a result, further projects supporting large enterprises can be found outside the specified codes, e.g. research and technology development and innovation projects under code 04 and 09, or energy efficiency projects under code 43.

Regional distribution

Regional distribution of large enterprise support in Germany is strongly conditioned by the higher availability of ERDF funds under the convergence objective operational programmes in the new Länder and the eligibility rules of the national productive investment support measure “Joint Agreement for the Improvement of Regional Economic Structures”. This measure is often used as part of the national counterpart to the ERDF funds and allows for higher support rates for large enterprises in economically disadvantaged regions. As a result, 93% of large enterprise support under the specified codes in Germany has been committed by the operational programmes in the new Länder, under the convergence objective.

33. Figure: Committed support to large enterprises by region in Germany



Convergence regions

87% of the large enterprise projects in Germany have been implemented in the convergence objective regions. The convergence objective regions are located in Eastern Germany (with the exception of the convergence region Luneburg in Lower Saxony and Berlin, which falls under the regional competitiveness and employment objective). The average financial project volume was almost twice as high in the convergence regions compared to that in the non-convergence regions. This is probably fostered by better funding conditions under the Joint Agreement for the Improvement of Regional Economic Structures.

34. Figure: Committed support to large enterprises by regional policy objective in Germany

Committed support		
Regional policy objectives	Number of projects	Average support (EUR mn)
Convergence region	667	1.0
Outside of convergence region	96	0.5

1.3.3 Characteristics of supported large enterprises

Size of supported large enterprises

632 large enterprises have been supported, which corresponds to 2.5%⁷ of all large enterprises in Germany. One firm had 1.2 projects on average, which reveals that occasionally a firm was supported multiple times during the programming period. The average amount of ERDF support per supported large enterprise was EUR 1.1 million. In a few cases several projects for enterprises belonging to the same enterprise group were supported. Clustering according to enterprise groups produces a number of 577 entities.

35. Figure: Number of supported large enterprises, average amount of support and number of projects in Germany

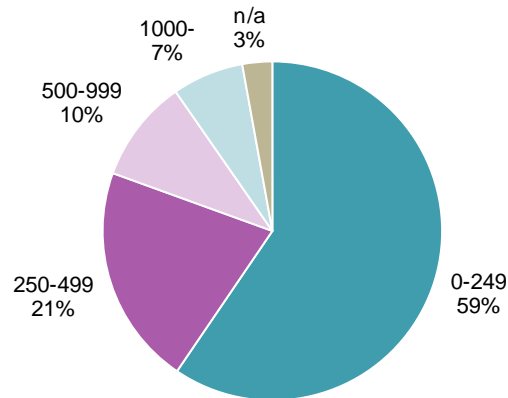
Number of supported large enterprises	Average amount of support per firm (EUR mn)	Average number of supported projects per firm
632	1.1	1.2

More than half (59%) of the supported German large enterprises employ less than 250 people at the supported project site.⁸

⁷ Based on the number of active large enterprises that fulfill the employee and turnover criteria.

⁸ Data on employees from the monitoring system of the managing authorities was only provided for about 25% of the projects. The data from managing authorities was complemented by data from research in company databases and by internet research to give an impression of approximate enterprise sizes. For enterprises with several locations data, in some cases, could not be attributed to the project site.

36. Figure: Distribution of supported large enterprises by employment category in Germany



The following figure shows the breakdown of the committed ERDF support according to NACE sections. Manufacturing is by far the prevailing area of support across all⁹ operational programmes with 610 supported projects and 81% of ERDF funds given to large enterprises operating in this industry. The second ranking NACE section is 'Transportation and storage', receiving 7% of ERDF support provided by 23 projects. The section 'Other service activities' accounted for 4% of ERDF funding, 'Administrative and support service activities' for 3% and 'Wholesale and retail trade; repair of motor vehicles and motorcycles' for 2%. All other sections accounted for less than one percent of ERDF funding.

Sector of supported large enterprises

37. Figure: Distribution of total committed support to large enterprises by primary NACE code in Germany (in thousands)

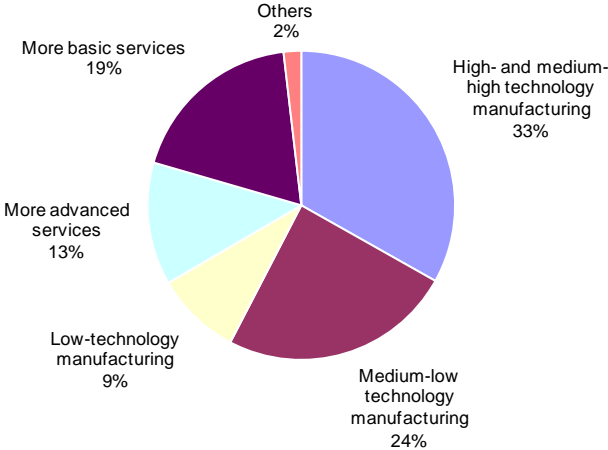


Sectoral categorisation of the large enterprises receiving support from ERDF shows that the enterprises are distributed mainly among high- and medium-high technology manufacturing (33%) and

⁹ Except the Operational Programme Lower Saxony that supported in total only two large enterprise projects falling in section G.

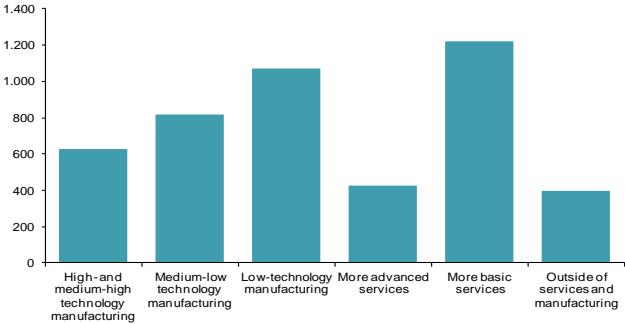
medium-low technology manufacturing (24%). In comparison, the share of low-technology manufacturing enterprises (9%) is relatively low. The services sectors account for about one third (32%) of classified supported enterprises.¹⁰

38. Figure: Distribution of supported large enterprises by sectoral categorisation in Germany



The average committed support by sector shows that the highest amount of support was given to more basic services projects. Low technology manufacturing and medium-low technology manufacturing projects also received higher support than the average support per project across all sectors.¹¹

39. Figure: Average committed support by sectoral categorisation in Germany (in thousands)



¹⁰ 198 manufacturing enterprises (31% of supported enterprises) could not be classified because information on NACE codes was not available with sufficient depth.

¹¹ 234 manufacturing projects (31% of supported projects comprising 41% of the ERDF funding) could not be classified because information on NACE codes was not available with sufficient depth.

Categorisation based on leadership and geographical coverage

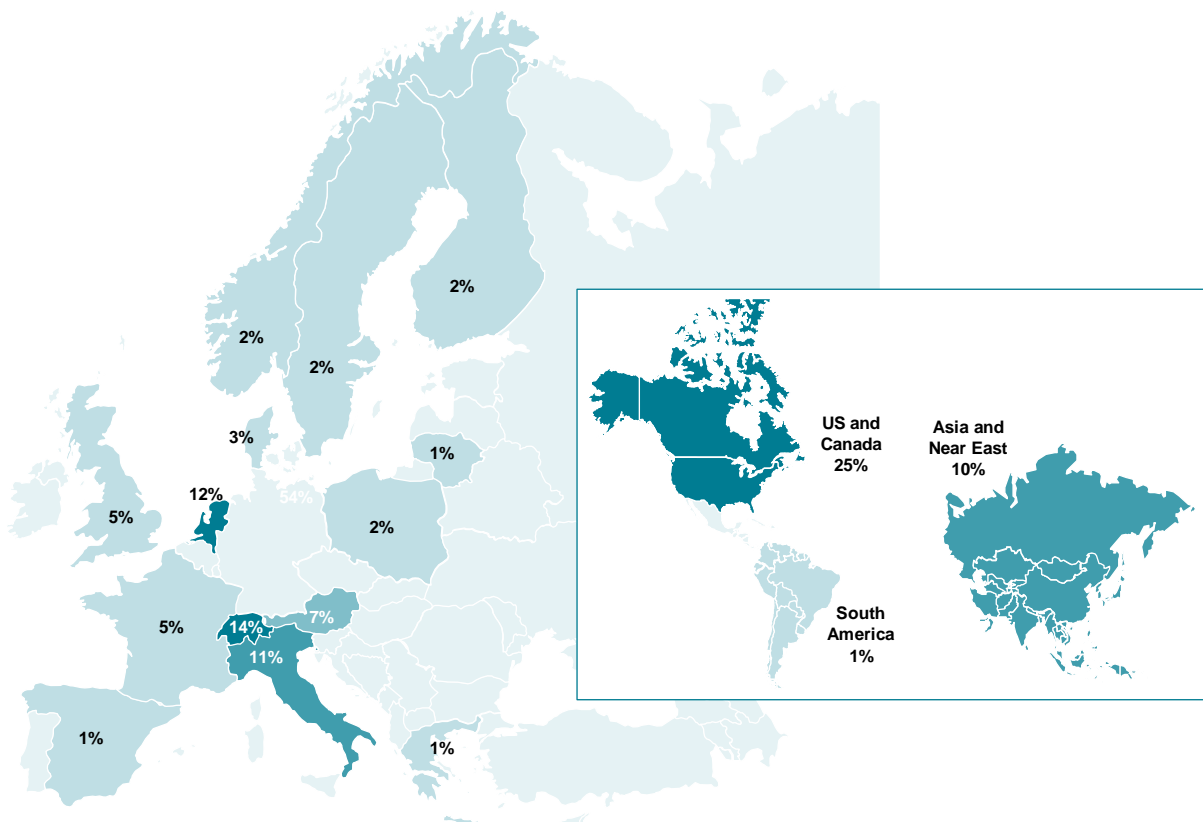
The vast majority (68%) of supported enterprises in Germany operate internationally. Only 200 enterprises were identified as national companies, having operations exclusively in Germany. Among the 432 enterprises operating internationally, 304 (48%) are headquartered in Germany or belong to enterprise groups headquartered in Germany and hence considered as domestic multinational companies. 128 enterprises (20%) are headquartered or belong to enterprise groups headquartered in a foreign country. Supported multinational companies are usually involved in operations in a large number of countries.

40. Figure: Distribution of supported large enterprises by geographical coverage in Germany

Distribution of large enterprises based on the geographical coverage		
Geographical Coverage	Operation in a large number of countries	Operation in a small number of countries
Foreign multinational companies	105	23
Domestic multinational companies	224	80
National companies	200	
Total	632	

The most common country of origin of supported foreign multinational companies in Germany is the United States (22%), followed by Switzerland (14%). Italy (9%), the Netherlands (8%) and Austria (7%) are also among the more common individual countries of origin of supported foreign multinational companies.

41. Figure: Distribution of supported large enterprises by country of origin in Germany





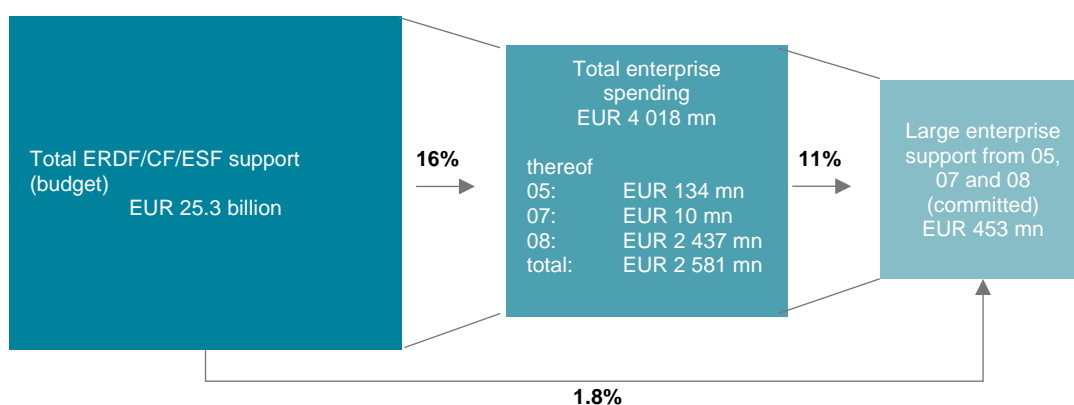
1.4 Hungary

1.4.1 Share of large enterprise support

More than EUR 25 billion of ERDF/CF/ESF funding has been budgeted for Hungary in the 2007-2013 programming period. The total committed amount at the end of 2013 was EUR 27 billion (with a slight over commitment).

16% of the budget has been accounted as enterprise spending, from which 11% has been awarded to large enterprises resulting in a 1.8% share of total large enterprise support from the whole budget in Hungary.

42. Figure: Committed support by relevant expenditure codes and large enterprise status in Hungary



In Hungary fifteen operational programmes were implemented. The large enterprise support from the relevant expenditure codes has been distributed among the following operational programmes:

43. Figure: The list of relevant Operational Programmes which included direct enterprise support on 05, 07 and 08 expenditure codes for large enterprises in Hungary

Type of Operational Programmes	Relevant Operational Programmes
Sectoral	<ul style="list-style-type: none"> ■ Economic Development (EDOP)
Regional	<ul style="list-style-type: none"> ■ Central Hungary (CHOP) ■ South Great Plain (SGPOP) ■ South Transdanubia (STOP) ■ North Great Plain (NGPOP) ■ North Hungary (NHOP) ■ Central Transdanubia (CTOP) ■ West Transdanubia (WTOP)

The average committed large enterprise support amounts to EUR 45 per capita, EUR 662 per operating enterprise in the whole programming period.

Refundable support has been targeted to small and medium enterprises, therefore the form of large enterprise support has been exclusively non-refundable.

EUR 533 million support has been committed to large enterprises in the 2007-2013 programming period. The share of national contribution is 15% for all Hungarian operational programmes, which means that 85% of support is financed from EU funds.

44. Figure: Breakdown of committed large enterprise support into ERDF and national contribution in Hungary

Committed support (EUR mn)		
ERDF	National contribution	Total
453	80	533

The aid intensity for large enterprises in Hungary is an average of 25%: the total investment was EUR 2.1 billion. Regarding the difference between the aid intensity for large enterprises and small and medium-sized enterprises, the maximum aid intensity for large enterprises could reach 50%, while in case of small and medium-sized enterprises 70%. Two significant non-financial packages of support have been provided for large enterprises: fast track administration and VIP client management.

1.4.2 Key project level figures

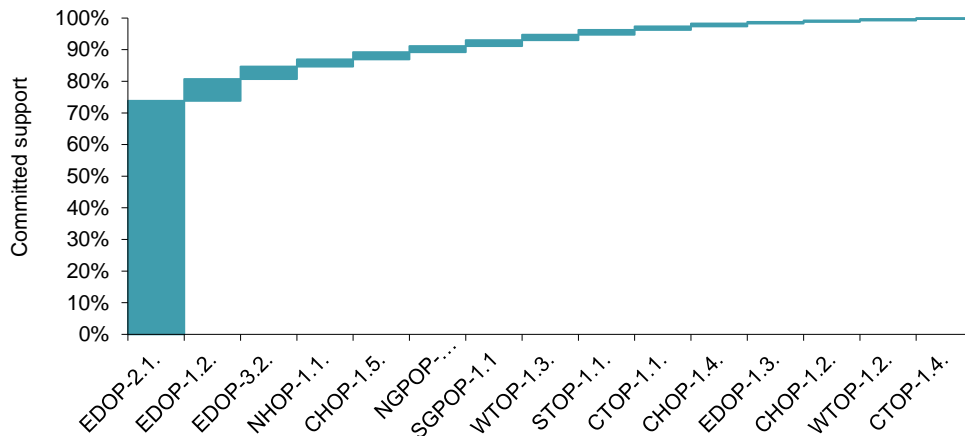
The amount of ERDF funds committed to large enterprises (EUR 453 million) has been realised through 409 projects. All the projects that requested support has been committed; however, a minimal share of the projects has not been contracted yet. 51% of the support has already been paid. The large majority of large enterprise support has been covered from the Economic Development Operational Programme. The Economic Development Operational Programme clearly peaks out from the relevant operational programmes both in terms of amount and number of projects.

45. Figure: Number of projects and value of requested, committed, contracted and paid support to large enterprises by operational programme in Hungary

Operational Programme	Requested support		Committed support		Contracted support		Paid support	
	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects
South Great Plain	9.2	8	8.4	8	8.4	8	8.1	7
South Transdanubia	7.2	8	7	8	7	8	5.6	8
North Great Plain	8.8	10	8.7	10	8.7	10	7	10
North Hungary	10.6	8	10.4	8	10.4	8	8.3	6
Economic Development	390	338	386	338	370	331	174	230
Central Transdanubia	6.6	7	6.4	7	6.3	7	5.4	7
Central Hungary	16.9	18	16.7	18	16.6	18	12.8	16
West Transdanubia	10.4	12	9.8	12	9.8	12	8.3	12
Total	459	409	453	409	437	402	230	296

Fifteen measures among the eight operational programmes supported large enterprises. 85% of the funds have been awarded from the 2.1. measure of the Economic Development Operational Programme, which is twenty-three times more than the amount of committed support for the second measure in the list. The 2.1. measure of the Economic Development Operational Programme as the primary measure for technological modernisation of enterprises involves several areas of support, including complex enterprise development, complex technology development, and complex technology development partly in the most economically disadvantaged areas.

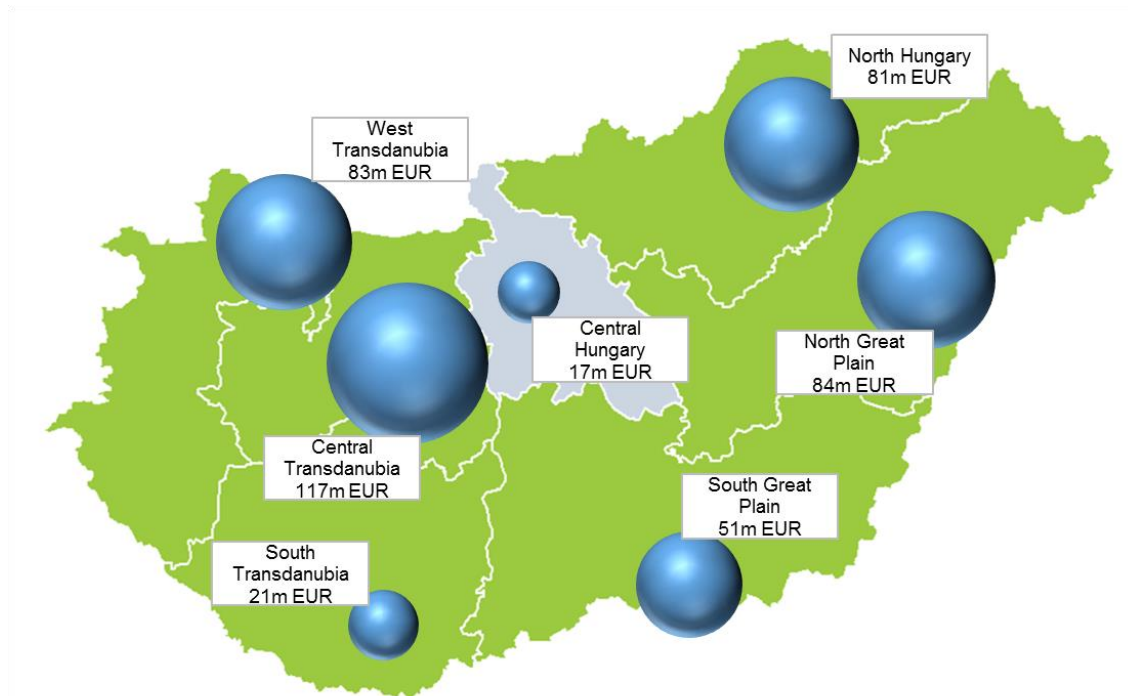
46. Figure: Distribution of committed support to large enterprises by measure in Hungary



Regional distribution

Four regions are leading in terms of committed large enterprise support, while the two southern regions (South Transdanubia and South Great Plain) are falling behind. In addition, the most developed Central Hungarian region is less represented as the funds of the Economic Development Operational Programme have not been available for the applicants located in this region.

47. Figure: Committed support to large enterprises by region in Hungary



Most economically disadvantaged regions

5% of the projects in which large enterprises have been beneficiaries, have been implemented in economically disadvantaged areas. The concerned regions are almost exclusively North Hungary and North Great Plain, where 15% of the projects are located in economically disadvantaged areas, compared to the overall 5%.

48. Figure: Committed support to large enterprises by economically disadvantaged status in Hungary

Committed support		
Economic status	Number of projects	Average support (EUR mn)
Economically disadvantaged	19	0.9
Not economically disadvantaged	390	1.1

1.4.3 Characteristics of supported large enterprises

Size of supported large enterprises

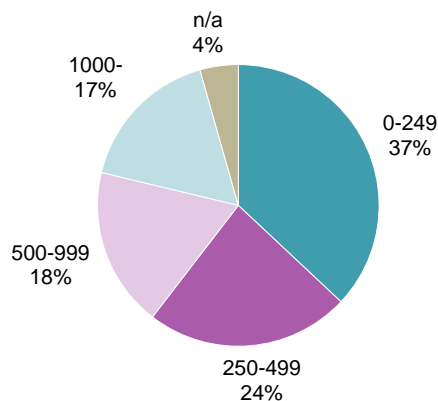
273 large enterprises have been supported, which corresponds to 31% of the number of active large enterprises in Hungary. One firm implemented 1.7 projects on average, which reveals that occasionally a firm applied multiple times during the period. The average amount of ERDF support has been nearly EUR 1.5 million per supported large enterprise.

49. Figure: Number of supported large enterprises, average amount of support and number of projects in Hungary

Number of supported large enterprises	Average amount of support per firm (EUR mn)	Average number of supported projects per firm
273	1.5	1.7

Nearly 40% of the supported Hungarian large enterprises employ less than 250 people (but still considered as large enterprise based on self-declaration). Only 46 of the supported enterprises employ more than 1000 people with the biggest employer leading with more than 3700 employees.

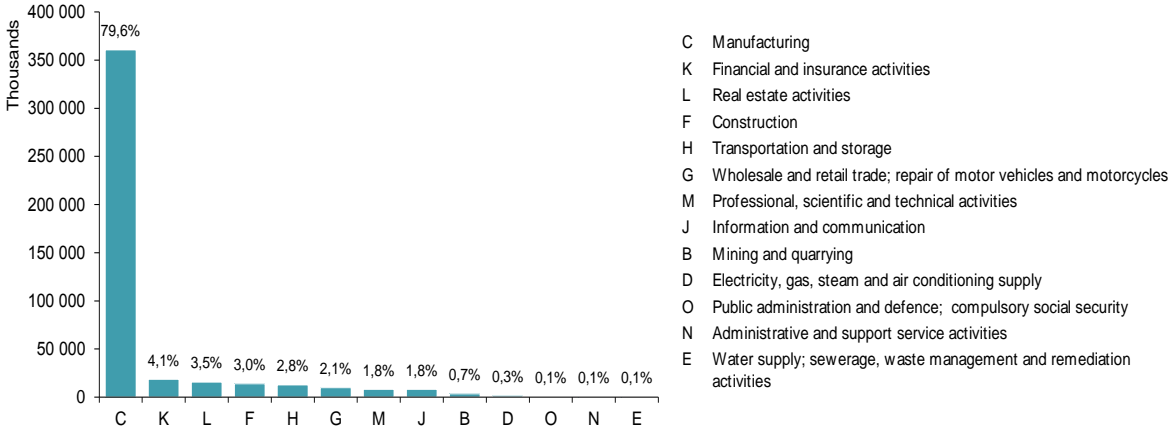
50. Figure: Distribution of supported large enterprises by employment category in Hungary



The following figure shows the industrial breakdown of the committed support. The manufacturing industry is the most relevant destination of the support, gaining nearly 80% of all funds. This amount is almost twelve times higher than that received by the second and third largest recipient industries combined, namely the financial and insurance activities and the real estate activities.

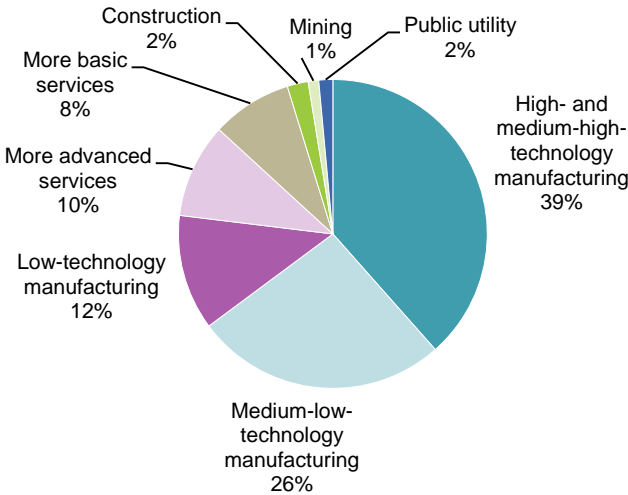
Sector of supported large enterprises

51. Figure: Distribution of total committed support to large enterprises by primary NACE code in Hungary



The next pie chart shows the sectoral categorisation of the large enterprises receiving support from ERDF. 38% of the supported Hungarian large enterprises are high- and medium-high technology firms. Compared to that the share of service provider enterprises is relatively low, only 18%. The primary economic activity of 5% of the supported large enterprises falls outside of services and manufacturing.

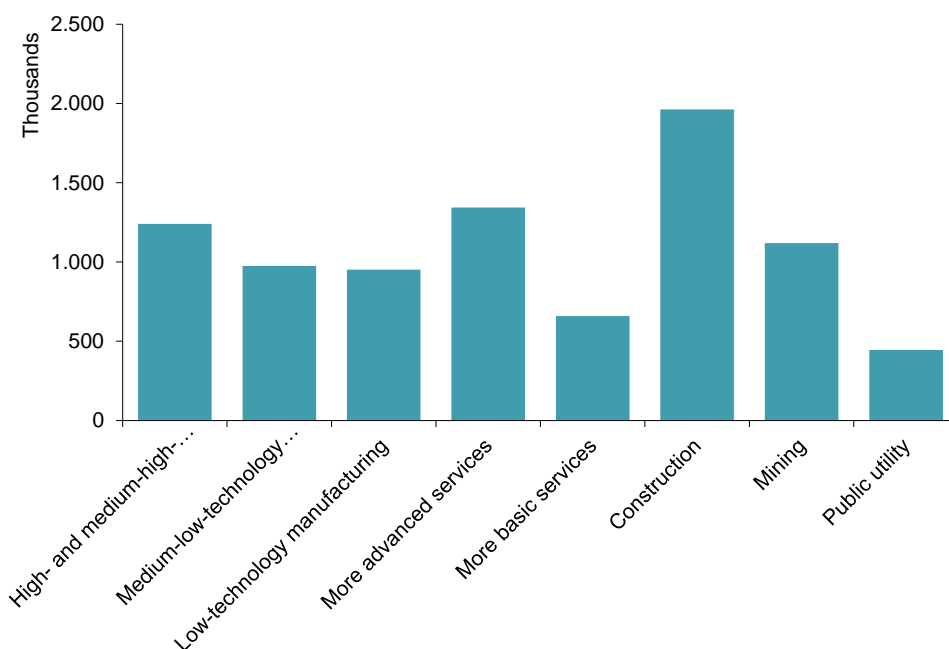
52. Figure: Distribution of supported large enterprises by sectoral categorisation in Hungary



The average committed support by sector confirms the intuition, that high- and medium-high-technology manufacturers and more advanced service providers invest in larger projects than their peers among less developed technology manufacturers and less advanced service providers. The highest average support has been committed to construction companies. The projects of the construction beneficiaries are mostly of a business environment development nature aiming to build an R&D&I centre or a business incubator. Mining and public utility enterprises make up a minor share

of supported enterprises, therefore the average committed support in these sectors cannot be compared to others.

53. Figure: Average committed support by sectoral categorisation in Hungary



Categorisation based on leadership and geographical coverage

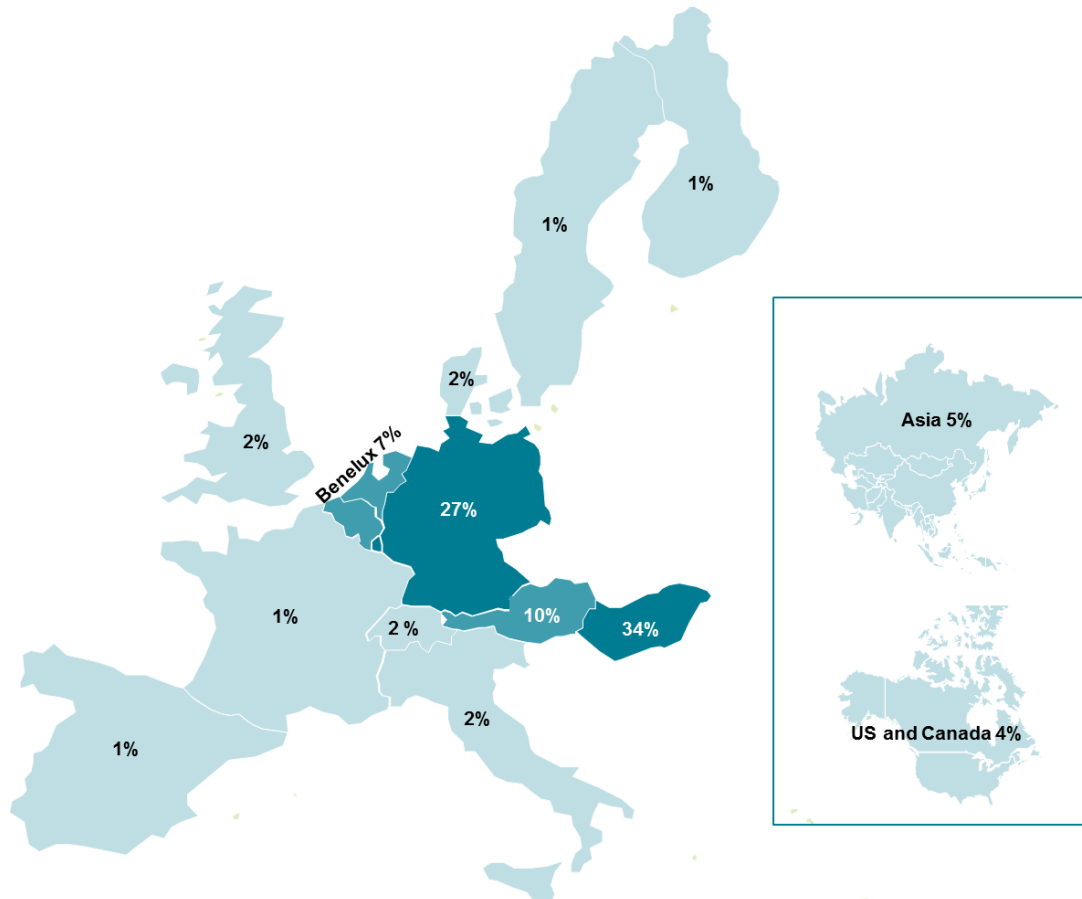
There are no classic domestic multinational companies among the supported Hungarian large enterprises. This does not necessarily mean that ERDF support is less popular among them, but rather that their overall number in Hungary is very low. The slight majority of supported large enterprises are multinational companies with a primary residence outside of the country.

54. Figure: Distribution of supported large enterprises by geographical coverage in Hungary

Distribution of large enterprises based on the geographical coverage		
Geographical Coverage	Operation in a large number of countries	Operation in a small number of countries
Foreign multinational companies	20	160
Domestic multinational companies	0	0
National companies	93	
Total	273	

The main countries of origin are Germany, Austria and the Benelux states among the foreign multinational companies. A fraction of companies is headquartered in another European or Asian / North American country.

55. Figure: Distribution of supported large enterprises by country of origin in Hungary



4% of the projects can be considered as foreign direct investment (14 projects), which account for 7% of the committed support to large enterprises.

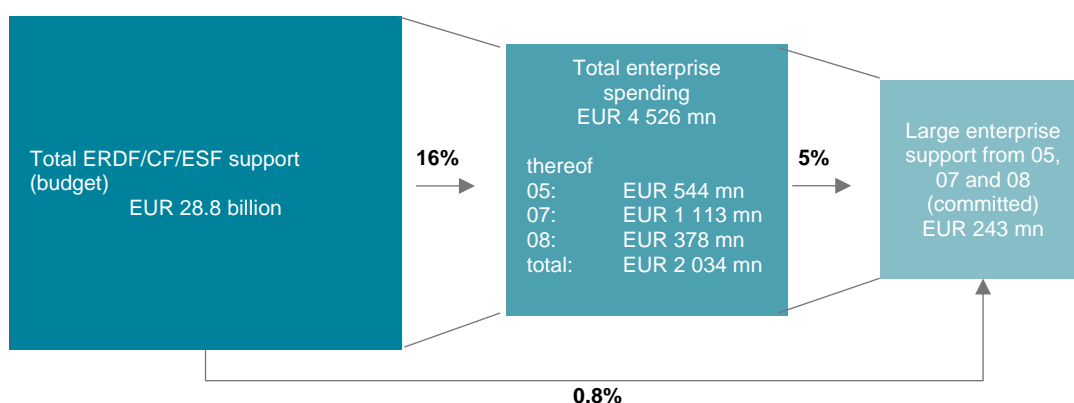
1.5 Italy

1.5.1 Share of large enterprise support

Nearly EUR 29 billion of ERDF/ESF funding has been budgeted for Italy in the 2007-2013 programming period. According to the latest validated data as of 31/12/2013, the total ERDF committed amount was around EUR 20.6 billion.

Around 16% of the budget and approximately 22% of the total committed ERDF support has been committed as enterprise spending, from which EUR 243 million have been awarded to large enterprises, resulting in a 0.8% share of large enterprise support (relevant expenditure codes) from the total budget in Italy.

56. Figure: Committed support by relevant expenditure codes and large enterprise status in Italy



In Italy 28 operational programmes co-financed by the ERDF were implemented. However, the large enterprise support from these expenditure codes has been distributed between the following 13 operational programmes:

57. Figure: The list of relevant Operational Programmes which included direct enterprise support on 05, 07 and 08 expenditure codes for large enterprises in Italy

Type of Operational Programmes	Relevant Operational Programmes
Sectoral	<ul style="list-style-type: none"> ■ National Operational Programme (NOP) for Research and competitiveness (NOP R&C) ■ Interregional Operational Programme for Cultural and Natural heritage and for Tourism (OP Culture and Tourism)
Regional	<ul style="list-style-type: none"> ■ ERDF Regional Operational Programme Liguria (ERDF ROP Liguria) ■ ERDF Regional Operational Programme Lombardia (ERDF ROP Lombardia) ■ ERDF Regional Operational Programme Marche (ERDF ROP Marche) ■ ERDF Regional Operational Programme Piemonte (ERDF ROP Piemonte) ■ ERDF Regional Operational Programme Puglia (ERDF ROP Puglia)

Type of Operational Programmes	Relevant Operational Programmes
	<ul style="list-style-type: none"> ■ ERDF Regional Operational Programme Sardegna (ERDF ROP Sardegna) ■ ERDF Regional Operational Programme Sicilia (ERDF ROP Sicilia) ■ ERDF Regional Operational Programme Toscana (ERDF ROP Toscana) ■ ERDF Operational Programme for the Autonomous Province of Trento (ERDF OP Trento) ■ ERDF Regional Operational Programme Umbria (ERDF ROP Umbria) ■ ERDF Regional Operational Programme Veneto (ERDF ROP Veneto)

In the whole programming period, the average committed large enterprise support amounts to EUR 4 per capita, taking into account the whole Italian population, and to EUR 651 per operating enterprise, taking into account the total number of enterprises registered in Italy. Considering large enterprises only, the average committed large enterprise support amounts to EUR 69,497 per operating Italian large enterprise.

Refundable support has been targeted to small and medium-sized enterprises, except in the cases of:

- some credit schemes previewed for by the National Operational Programme for Research and Competitiveness, which provided a total of around EUR 54 million of refundable support to 30 projects;
- a credit scheme of ERDF Regional Operational Programme Sardegna, which provided EUR 3.5 million to one project;
- the guarantee scheme of the ERDF Regional Operational Programme Lombardia, which provided a total of around EUR 1 million to 28 projects.

Including the national co-financing, a total of EUR 385 million support has been committed to large enterprises in the 2007-2013 programming period. In Italy, the share of national contribution varies according to the programme and its priority axes. However, by applying either a project-level co-financing rate, if available, or the co-financing rate of each relevant priority axis to the projects co-financed within that axis, results show that 63% of support is financed from the ERDF.

58. Figure: Breakdown of committed large enterprise support into ERDF and national contribution in Italy

Committed support (EUR mn)		
ERDF	National contribution	Total
243	142	385

Considering the 13 programmes supporting large enterprises on expenditure codes 05, 07 and 08, the aid intensity of projects for large enterprises in Italy stands at an average of 29%, the total investment could reach EUR 1.3 billion. Regarding the aid intensity difference between large enterprises and small and medium-sized enterprises, taking into account the same programmes and expenditure codes, the average aid intensity of projects targeted to small and medium-sized enterprises is 60.5%.

1.5.2 Key project level figures

The amount of ERDF funds committed for large enterprises (EUR 243 million) has been realised through 419 projects. Only 3 projects that requested support have not been committed. 37% of the committed support has been paid. The large majority of large enterprise support has been covered from the National Operational Programme for Research and Competitiveness. The National Operational Programme for Research and Competitiveness clearly peaks out from the relevant operational programmes both in terms of amount and number of projects.

59. Figure: Number of projects and value of requested, committed and paid support to large enterprises by operational programme in Italy

Operational Programme ¹²	Requested support ¹³		Committed support ¹⁴		Paid support ¹⁵	
	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects
NOP Research and competitiveness	154	140	154	140	32	61
ERDF ROP Liguria	0.6	15	0.5	12	0.1	3
ERDF ROP Lombardia	1.1	56	1.1	56	1.1	56
ERDF ROP Marche	0.2	5	0.2	5	0.2	4
ERDF ROP Piemonte	17	87	17	87	8	48
ERDF ROP Puglia	43	54	43	54	28	44
ERDF ROP Sardegna	8	3	8	3	7	3
ERDF ROP Sicilia	0.1	1	0.1	1	0.1	1
ERDF ROP Toscana	7	14	7	14	5	14
ERDF OP Trento	0.02	1	0.02	1	0.01	1
ERDF ROP Umbria	1.3	39	1.3	39	1.1	33
ERDF ROP Veneto	0.3	3	0.3	3	0.2	3
Interregional Operational Programme for Cultural and Natural heritage and for Tourism	9	1	9	1	8	1
Total	243.1	419	243	416	91	272

Fifteen measures ("Operative objectives") among the thirteen operational programmes supported large enterprises. 48% of the funds have been awarded from the National Operational Programme Research and Competitiveness II.1 measure and 15% of the funds have been awarded from another relevant Research and Competitiveness measure, measure I.2. The National Operational Programme

¹² In case the large enterprise received support as a member of a partnership with other applicants; the total amounts were divided by the number of applicants.

In the case of the National Operational Programme Research and Competitiveness, the enterprise often presents a single investment plan, including both refundable and non-refundable support. However, according to the COCOF Note 10-0014-05, financial engineering funds are managed as separate projects. Therefore, the refundable and the non-refundable parts of the investment plan are considered in this document as two projects

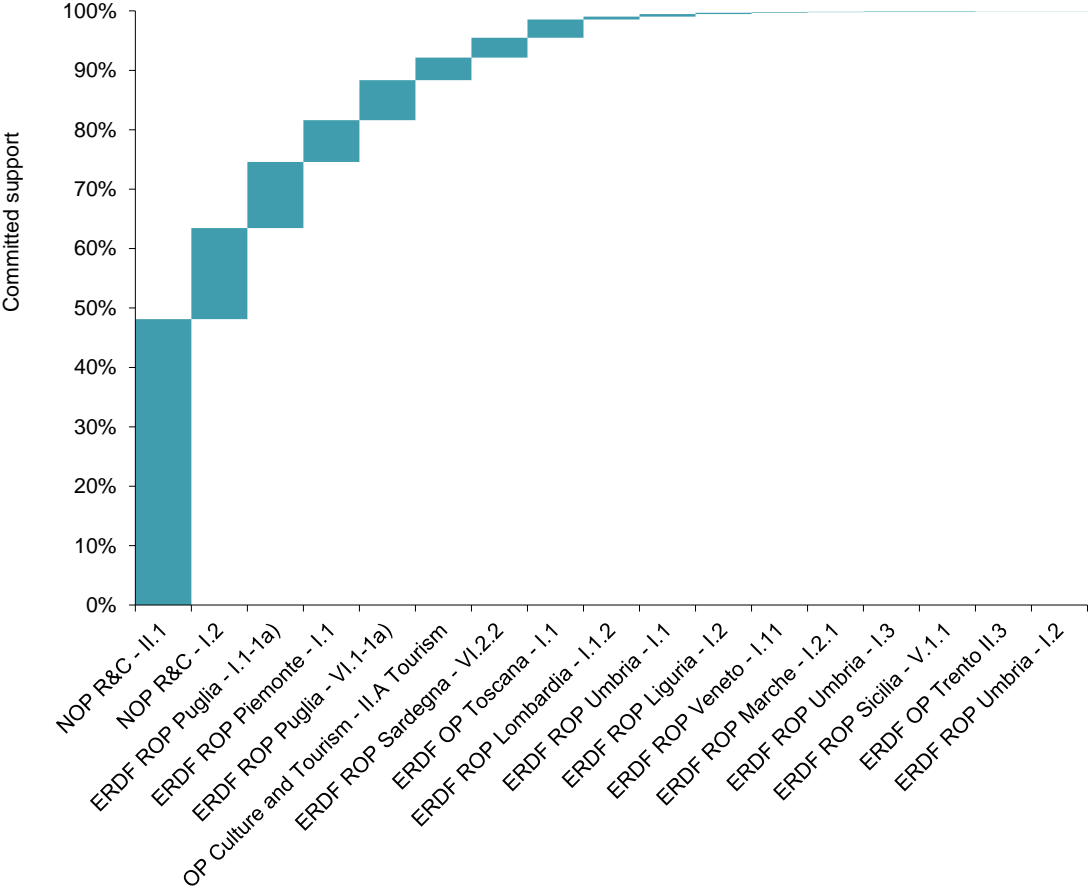
¹³ Requested amounts correspond to the accepted amounts from eligible projects only ("Contributo ammesso" in Italian).

¹⁴ "Impegni al netto delle revoche" in Italian. Please note that there is no difference between "committed" and "contracted", according to the Italian law.

¹⁵ Paid amounts correspond to the expenditure accepted by the Administrations ("Pagamento ammesso validato al netto delle revoche" in Italian). Refundable support is considered as requested, committed and paid also in the case of guarantees.

Research and Competitiveness II.1 measure is dedicated to the strengthening of the productive system of the convergence regions, through supporting innovation, R&D and transfer of technologies. The Research and competitiveness I.2 measure is targeted at strategic productive areas within convergence regions and includes complex and integrated innovation projects.

60. Figure: Distribution of committed support to large enterprises by measure in Italy



Regional distribution

Almost all the committed large enterprise support was dedicated to the convergence regions, in particular to Campania and to a lesser extent to Sicilia and Puglia. This is related to the fact that the National Operational Programme Research and Competitiveness is dedicated to convergence regions exclusively and to the relatively high investments fuelled by the Regional Operational Programme for Puglia. The Regional Operational Programme for Sardegna, a phasing in region, also committed a relatively large amount of resources for large enterprise support. Furthermore, among the competitiveness regions, Piemonte and, to a lesser extent, Toscana committed the highest amounts of ERDF support for large enterprises.

61. Figure: Committed support to large enterprises by region in Italy



Convergence regions

Nearly half of all projects with large enterprises as beneficiaries have been implemented in the convergence regions.

62. Figure: Committed support to large enterprises by regional policy objective in Italy

Committed support		
Regional policy objectives	Number of projects	Average support (EUR mn)
Convergence region	196	1.1
Outside of convergence region	220	0.2

1.5.3 Characteristics of supported large enterprises

Size of supported large enterprises

270 large enterprises have been supported¹⁶, which corresponds to 8% of the number of active large enterprises in Italy. One firm had 1.5 projects on average, which reveals that some firms applied multiple times during the period. The average amount of ERDF support has been around EUR 0.9 million per supported large enterprise.

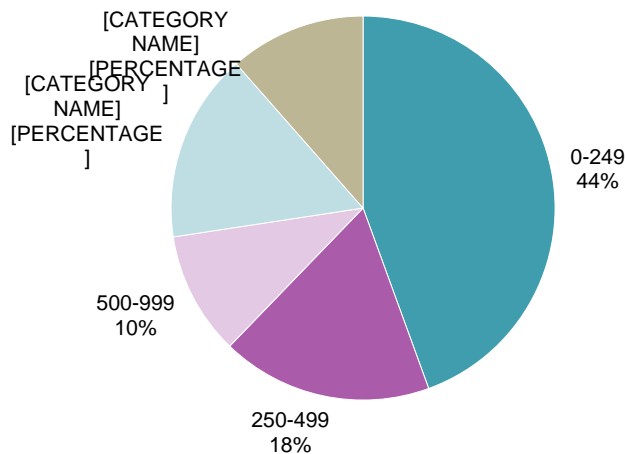
63. Figure: Number of supported large enterprises, average amount of support and number of

Number of supported large enterprises	Average amount of support per firm (EUR mn)	Average number of supported projects per firm
270	0.9	1.5

projects in Italy

Approximately 44% of the supported Italian large enterprises employ less than 250 people, while 16% of the supported enterprises employ more than 1000 people. Almost all of the enterprises for which data is available employ less than 10,000 people¹⁷.

64. Figure: Distribution of supported large enterprises by employment category in Italy



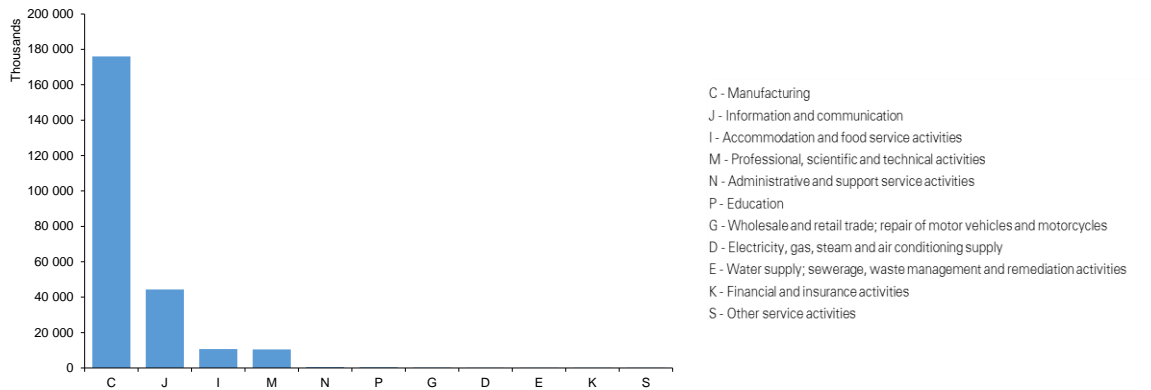
Sector of supported large enterprises

The following figure shows the industrial breakdown of the committed support. The manufacturing industry is the most relevant destination of the support, considering that large enterprises operating in this industry have gained nearly 72% of total funds. In comparison, only around 18% of the committed ERDF amount went to large enterprises operating in the information and communication sector.

¹⁶ Excluding the 3 enterprises managing the indicated 3 projects for which the support has not been committed yet.

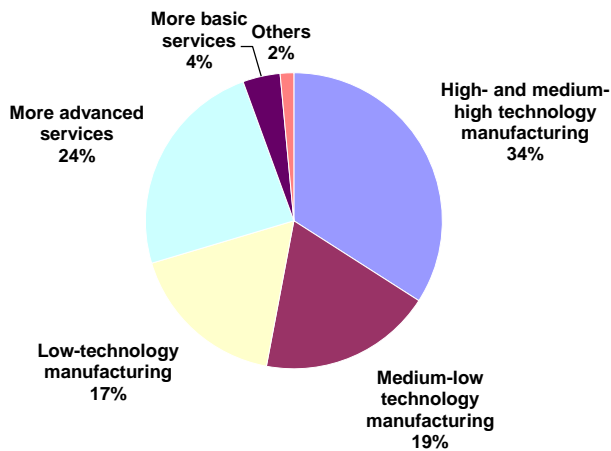
¹⁷ Data is not available for the 11.5% of the supported large enterprises.

65. Figure: Distribution of total committed support to large enterprises by primary NACE code in Italy



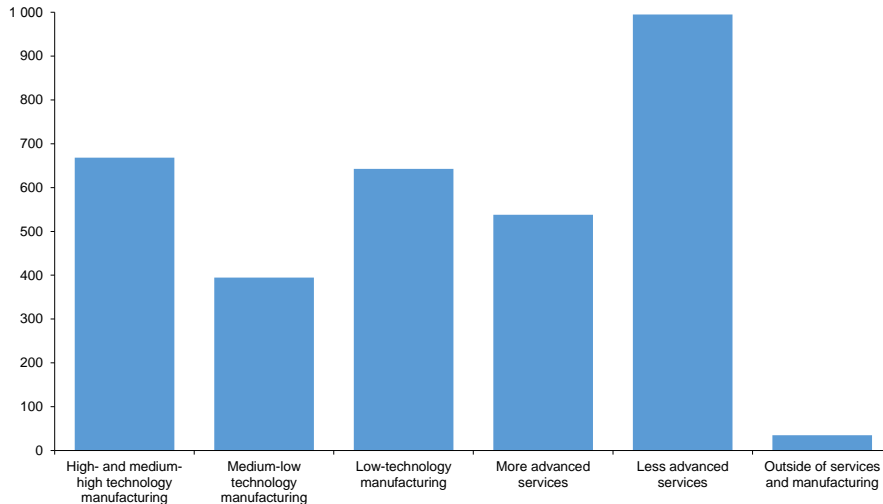
The next pie chart shows the sectoral categorisation of the large enterprises receiving support from ERDF. 34% of the sectors where supported Italian large enterprises operate are related to high- and medium-high technology manufacturing, while 24% of them are related to more advanced services. The primary economic activity falls outside of services and manufacturing in only 1.5% of the cases (particularly in the public utility sector). No company was financed in the agriculture and mining sectors.

66. Figure: Distribution of supported large enterprises by sectoral categorisation in Italy



The average committed support by sector shows that both high- and medium-high-technology manufacturers and low-technology manufacturing companies invest in larger projects than medium-low technology manufacturers. The highest average support has been committed to companies active in more basic services.

67. Figure: Average committed support by sectoral categorisation in Italy (in thousands)



Categorisation based on leadership and geographical coverage

All supported large enterprises have their legal seat in Italy¹⁸. However, several of these enterprises are included in groups or networks of enterprises and 24% of the supported enterprises belong to multinational groups with a primary head company residence outside of Italy. 114 supported enterprises operate in Italy exclusively.

68. Figure: Distribution of supported large enterprises by geographical coverage in Italy

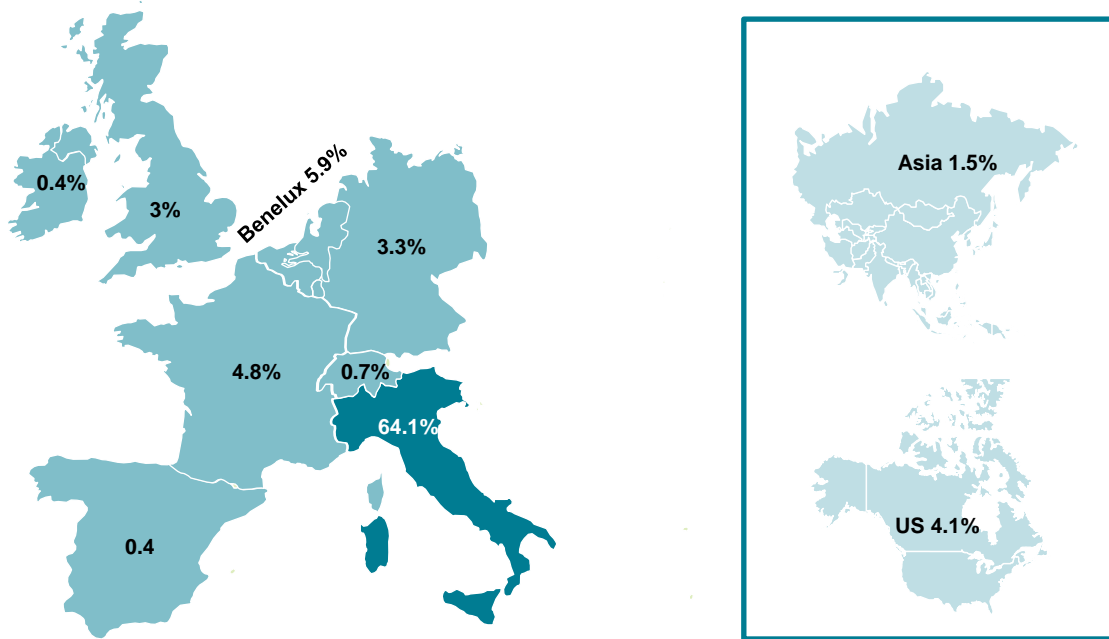
Distribution of large enterprises based on the geographical coverage		
Geographical Coverage	Operation in a large number of countries	Operation in a small number of countries
Foreign multinational companies	33	33
Domestic multinational companies	29	28
National companies	114	
Total ¹⁹	270	

The main countries of origin (categorised by the primary residence of the head company), among the foreign multinational companies, are France, the United Kingdom, the United States, the Netherlands, Germany and Luxembourg.

69. Figure: Distribution of supported large enterprises by country of origin in Italy

¹⁸ Data are not available for 2 supported large enterprises.

¹⁹ Data are not available for 33 supported large enterprises.



Foreign direct investment support to large enterprises

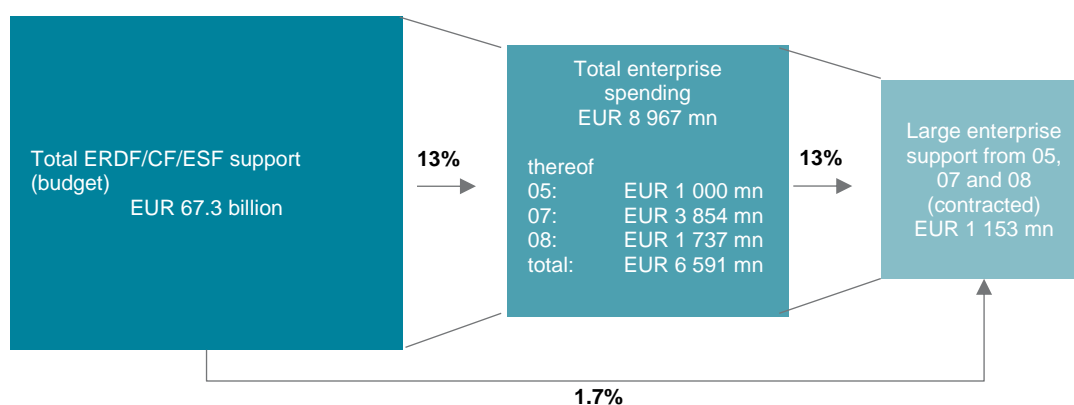
As indicated, 66 supported enterprises are included in networks whose head company is located outside of Italy. In various cases an eligibility criterion of the related call for proposals required that the enterprise should already own a plant located in the concerned area before applying. In the remaining cases the respective enterprises have been established in Italy for a long time.

1.6 Poland

1.6.1 Share of large enterprise support

More than EUR 67 billion of ERDF/CF/ESF funding has been budgeted for Poland in the 2007-2013 programming period. The total contracted amount²⁰ at the end of 2013 was almost EUR 1.2 billion. 13% of the budget has been accounted as enterprise spending, from which 13% has been awarded to large enterprises, resulting in a 1.7% share of total large enterprise support from the whole budget in Poland.

70. Figure: EU support by relevant expenditure codes and large enterprise status in Poland



In Poland twenty operational programmes have been implemented from ERDF. The large enterprise support from the relevant expenditure codes has been distributed between the following operational programmes:

71. Figure: The list of relevant Operational Programmes which included direct enterprise support on 05, 07 and 08 expenditure codes for large enterprises in Poland

Type of Operational Programmes	Relevant Operational Programmes
Sectoral	<ul style="list-style-type: none"> ■ Operational Programme Innovative Economy ■ Operational Programme Development of Eastern Poland
Regional	<ul style="list-style-type: none"> ■ Regional Operational Programme for the Region Dolnoslaskie ■ Regional Operational Programme for the Region Kujawsko-Pomorskie ■ Regional Operational Programme for the Region Lubelskie ■ Regional Operational Programme for the Region Lubuskie ■ Regional Operational Programme for the Region Łódzkie ■ Regional Operational Programme for the Region Małopolskie ■ Regional Operational Programme for the Region Mazowieckie ■ Regional Operational Programme for the Region Podkarpackie

²⁰ The basis of the calculation is contracted support in case of Poland, which will be updated to committed amounts in the updated version of this report.

Type of Operational Programmes	Relevant Operational Programmes
	<ul style="list-style-type: none"> ■ Regional Operational Programme for the Region Podlaskie ■ Regional Operational Programme for the Region Pomorskie ■ Regional Operational Programme for the Region Śląskie ■ Regional Operational Programme for the Region Świętokrzyskie ■ Regional Operational Programme for the Region Warmińsko-Mazurskie ■ Regional Operational Programme for the Region Wielkopolskie ■ Regional Operational Programme for the Region Zachodniopomorskie

The average contracted large enterprise support amounts to EUR 30 per capita, and to EUR 642 per operating enterprise in the whole programming period.

The form of large enterprise support has been exclusively non-refundable.

72. Figure: Breakdown of contracted large enterprise support into ERDF and national contribution in Poland

Contracted support (EUR mn)		
ERDF	National contribution	Total
1 153	203	1 356

The aid intensity for large enterprises in Poland is an average of 37%; the total investment could reach EUR 3.7 billion. The aid intensity for small and medium-sized enterprises differs as it is higher than that for large enterprises.

1.6.2 Key project level figures

The amount of ERDF funds contracted with large enterprises (EUR 1 153 million) has been realised through 539 projects. The large majority of large enterprise support has been covered from the Operational Programme Innovative Economy, which clearly peaks out compared to the other relevant operational programmes both in terms of amount and number of projects.

73. Figure: Number of projects and value of requested, committed, contracted and paid support to large enterprises by operational programme in Poland

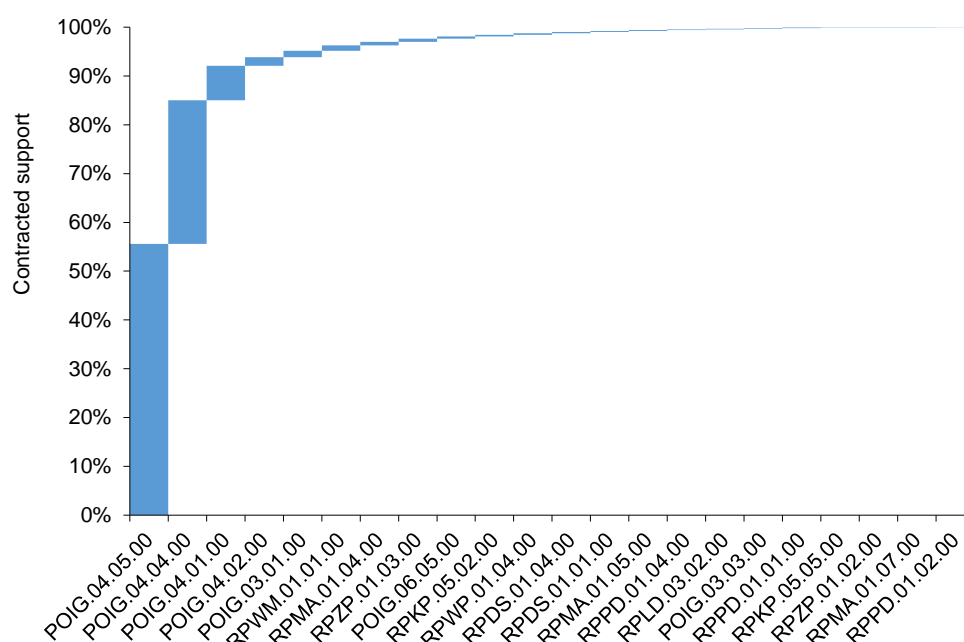
Operational Programme	Requested support ²¹		Committed support		Contracted support	
	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects
OP Innovative Economy	2 392	944	1 352	524	1 103	416
OP Development of Eastern Poland	30	3	30	3		
ROP for the Region Dolnośląskie	24	48	20	37	5	17
ROP for the Region Kujawsko-Pomorskie	69	85	47	57	5	35
ROP for the Region Lubelskie	0	3	0	2		

²¹ Requested support includes all public sector large enterprises.

Operational Programme	Requested support ²¹		Committed support		Contracted support	
	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects
ROP for the Region Lubuskie	6	4	6	4		
ROP for the Region Łódzkie	49	15	6	10	2	7
ROP for the Region Mazowieckie	0	4	0	3		
ROP for the Region Podkarpackie	43	30	29	18	10	13
ROP for the Region Podlaskie	5	8	5	8		
ROP for the Region Pomorskie	19	43	13	32	3	24
ROP for the Region Śląskie	1	1				
ROP for the Region Świętokrzyskie	10	4	10	3		
ROP for the Region Warmisko-Mazurskie	0	1				
ROP for the Region Wielkopolskie	46	40	44	36	13	23
ROP for the Region Zachodniopomorskie	64	4	4	3	3	2
Total	2 769	1 240	1 577	743	1 153	539

Twenty two measures among the sixteen operational programmes supported large enterprises. 56% of the funds have been awarded from the POIG.04.05.00 (Operational Programme Innovative Economy) measure which provided twice as much support than the second measure in the list. The POIG.04.05.00 supports projects of high value and generating a large number of jobs for investments with high innovative potential (preference for investments).

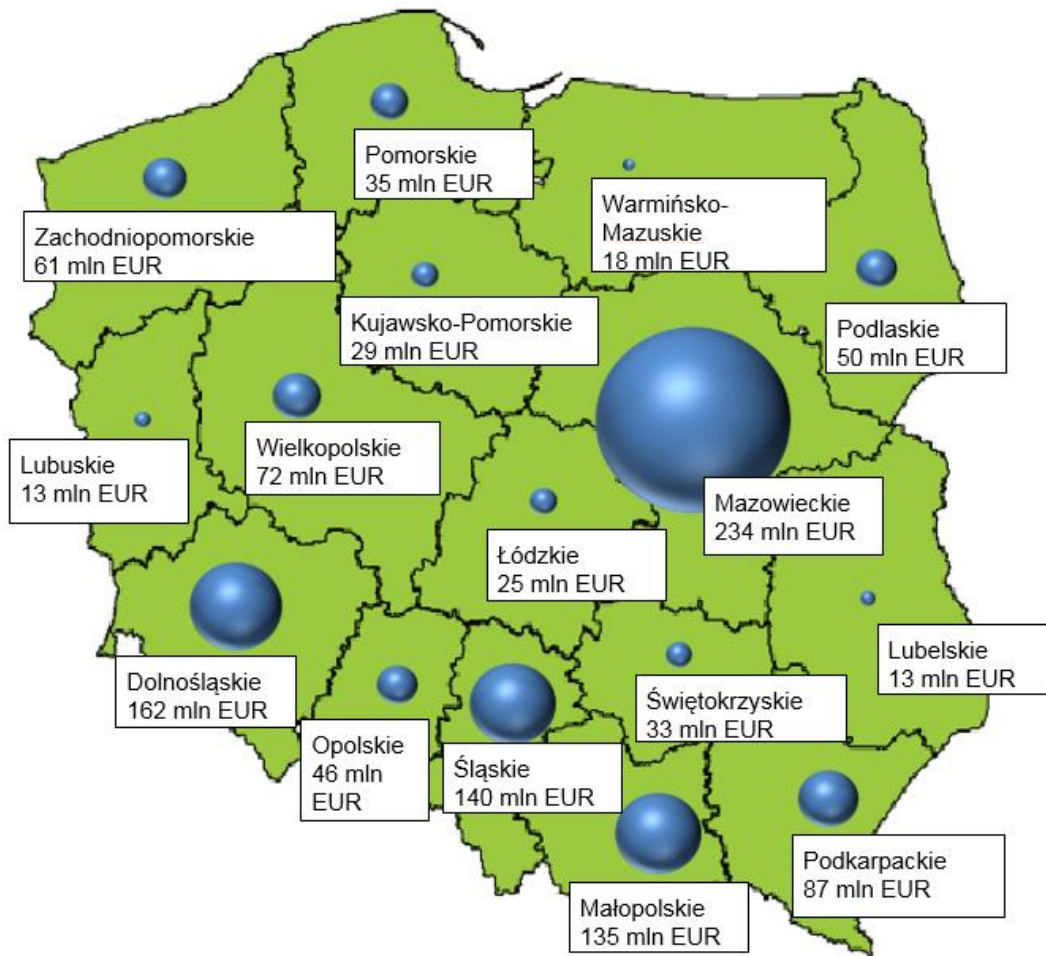
74. Figure: Distribution of contracted support to large enterprises by measure in Poland



Regional distribution

One region (Mazowieckie) is decisively leading in terms of contracted large enterprise support.

75. Figure: Contracted support to large enterprises by region in Poland



Most economically disadvantaged regions

25% of the projects, under the frames of which large enterprises have been beneficiaries, have been implemented in economically disadvantaged areas. The concerned regions are almost exclusively Warmińsko Mazurskie Region, Podlaskie Region, Lubelskie Region, Świętokrzyskie Region and Podkarpackie Region. There is an additional operational programme dedicated exclusively for the regions listed above (Operational Programme Development of Eastern Poland).

76. Figure: Contracted support to large enterprises by economically disadvantaged status in Poland

Contracted support		
Economic status	Number of projects	Average support (EUR mn)
Economically disadvantaged	107	1.9
Not economically disadvantaged	432	2.2

1.6.3 Characteristics of supported large enterprises

Size of supported large enterprises

408 large enterprises have been supported, which is the 12.5% of the number of active large enterprises in Poland. One firm had 1.3 projects on average, which reveals that occasionally a firm applied multiple times during the period. The average amount of ERDF support has been nearly EUR 2.8 million per supported large enterprise.

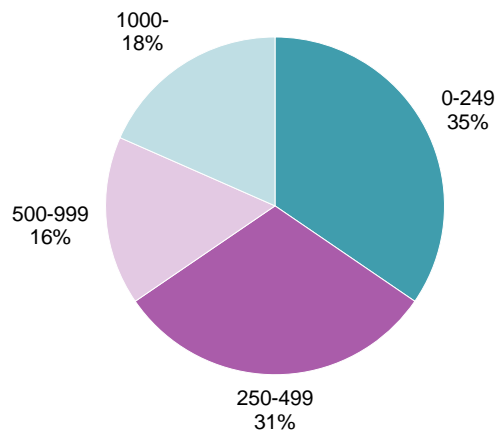
77. Figure: Number of supported large enterprises, average amount of support and number of

Number of supported large enterprises	Average amount of support per firm (EUR mn)	Average number of supported projects per firm
408	2.8	1.3

projects in Poland

35% of the supported Polish large enterprises employ less than 250 people (but still considered as large enterprises based on self-declaration). 75 of the supported enterprises employ more than 1000 people, while the biggest employer has more than 19,000 employees.

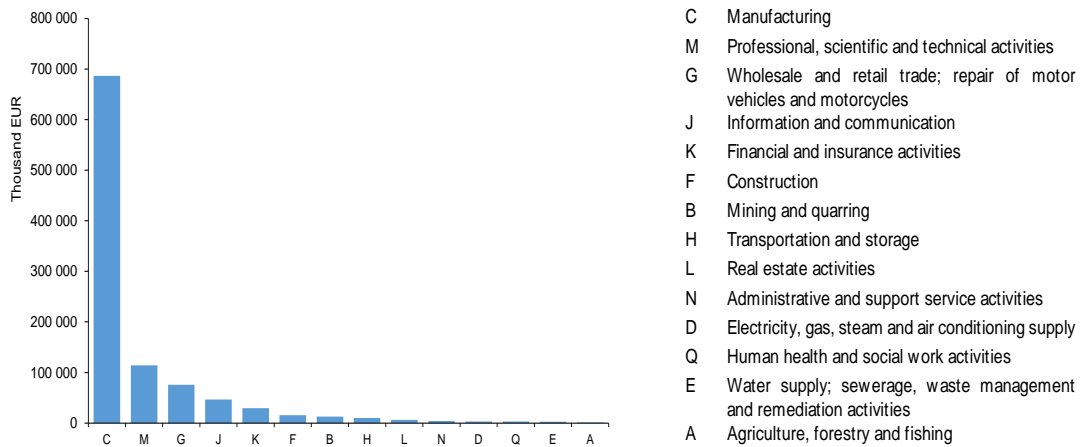
78. Figure: Distribution of supported large enterprises by employment category in Poland



The following figure shows the industrial breakdown of the committed support. The manufacturing industry is by far the most relevant destination of the support, gaining nearly 68% of the total support. This corresponds to an amount that is almost six times higher than that of the second largest recipient industry (Professional, scientific and technical activities) and almost ten times than the support received by the third largest recipient (Wholesale and retail trade repair of motor vehicles and motorcycles activities).

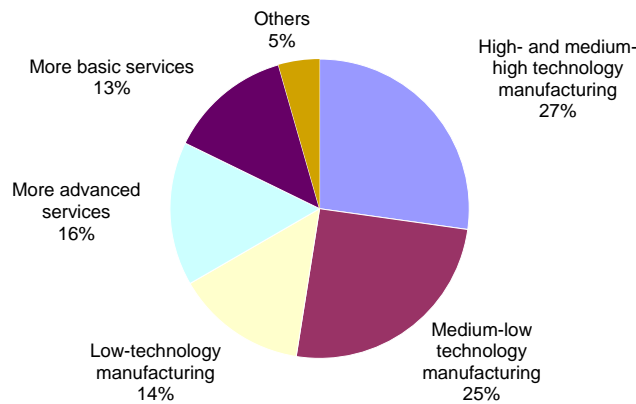
Sector of supported large enterprises

79. Figure: Distribution of total contracted support to large enterprises by primary NACE code in Poland



The next pie chart shows the sectoral categorisation of the large enterprises receiving support from ERDF. 27% of the supported Polish large enterprises are high and medium-high technology firms. The primary economic activity of 14% of the supported large enterprises is falling outside of services and manufacturing.²²

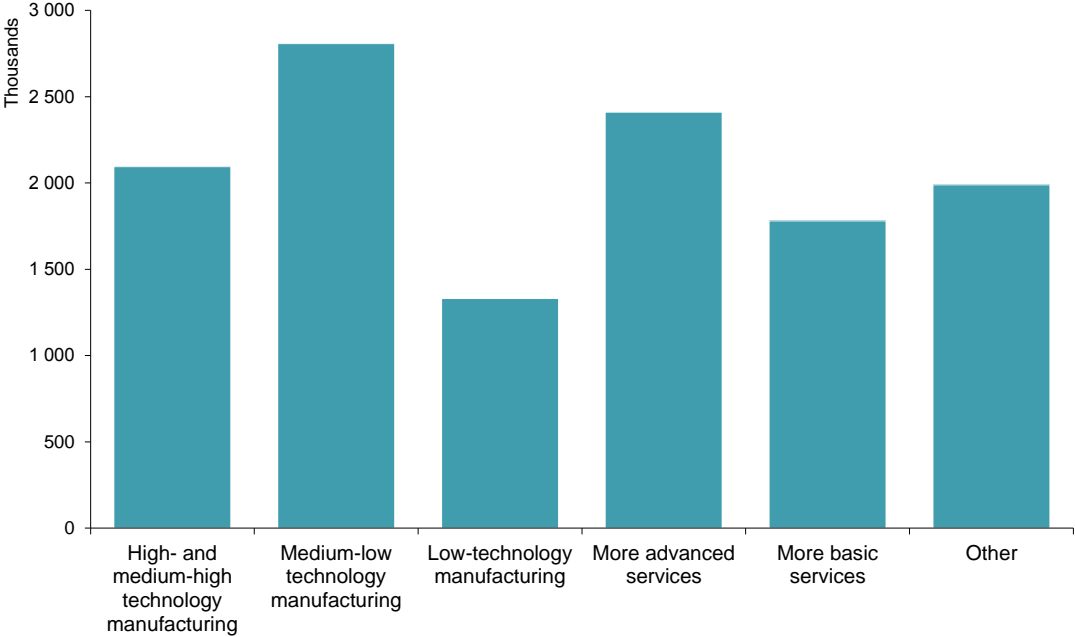
80. Figure: Distribution of supported large enterprises by sectoral categorisation in Poland



²² 360 large enterprises were categorized by sector out of the total 408.

The average contracted support by sector shows that medium-low-technology manufacturers and more advanced service providers invest in larger projects than their peers among low-technology manufacturers and less advanced service providers. The highest average support has been contracted to mining and public utilities companies²³.

81. Figure: Average contracted support by sectoral categorisation in Poland



Categorisation based on leadership and geographical coverage

There are 28 classic domestic multinational companies among the supported Polish large enterprises. While there are almost 9% of supported large enterprises that are multinational companies, the majority of supported large enterprises are national companies.

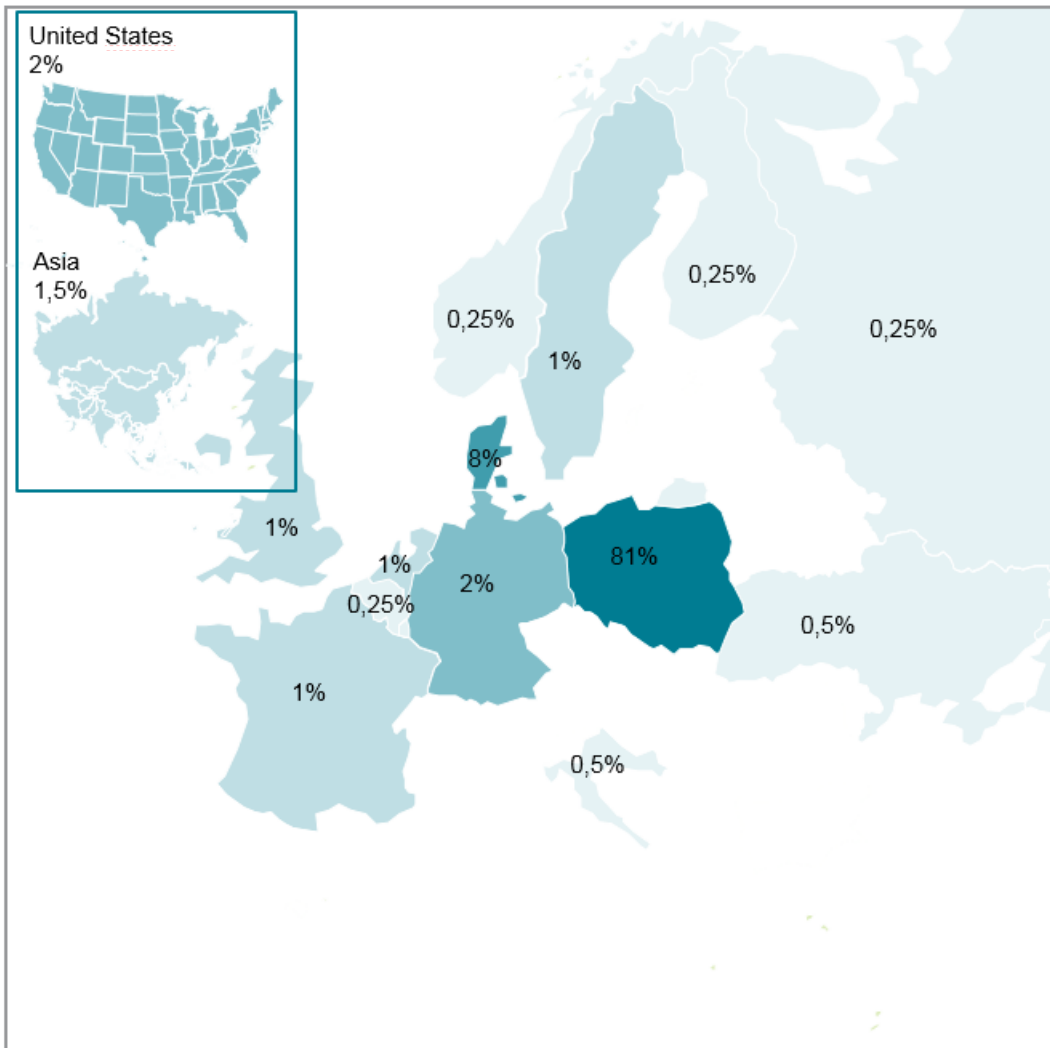
82. Figure: Distribution of supported large enterprises by geographical coverage in Poland

Distribution of large enterprises based on the geographical coverage		
Geographical Coverage	Operation in a large number of countries	Operation in a small number of countries
Foreign multinational companies	26	9
Domestic multinational companies	24	4
National companies	345	
Total	408	

The main countries of origin of foreign multinational companies are Denmark, Germany and the United States.

²³ 466 projects were categorized as data was not available for 73.

83. Figure: Distribution of supported large enterprises by country of origin in Poland



Foreign direct investment support to large enterprises

Based on the target group of the measures of the Operational Programme Innovative Economy and the project titles, approximately 20 foreign direct investment projects have been supported.

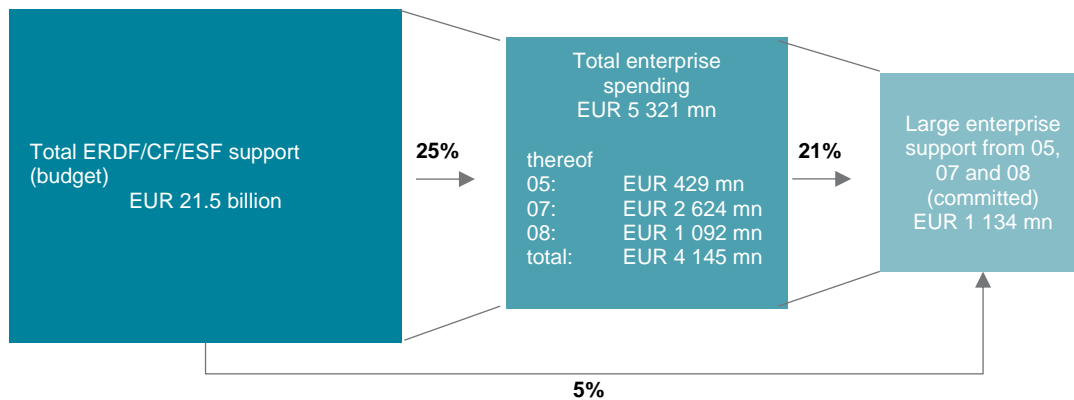
1.7 Portugal

1.7.1 Share of large enterprise support

Nearly EUR 22 billion of ERDF/CF/ESF funding has been budgeted for Portugal in the 2007-2013 programming period.

25% of the budgeted support of ERDF/CF has been accounted as enterprise spending, from which 21% has been awarded to large enterprises, resulting in a 5% share of total large enterprise support from the budget in Portugal.

84. Figure: Committed support by relevant expenditure codes and large enterprise status in Portugal



In Portugal 10 operational programmes were implemented from ERDF. The large enterprise support from the relevant expenditure codes has been distributed between the following operational programmes:

85. Figure: The list of relevant Operational Programmes which included direct enterprise support on 05, 07 and 08 expenditure codes for large enterprises in Portugal

Type of Operational Programmes	Relevant Operational Programmes
Sectoral	<ul style="list-style-type: none"> ■ Thematic Factors of Competitiveness
Regional	<ul style="list-style-type: none"> ■ Regional Operational Programme Centro ■ Regional Operational Programme Lisbon ■ Regional Operational Programme Algarve ■ Regional Operational Programme Azores ■ Operational Programme for the Enhancement of Economic Potential and Territorial Cohesion

The average committed large enterprise support amounts to EUR 107.4 per capita and to EUR 998 per operating enterprise in the whole programming period.

The form of support has been mainly non-refundable support for small and medium enterprises as well as for large enterprises.

1.7.2 Key project level figures

The amount of ERDF funds committed to large enterprises (EUR 1 134 million) has been realised through 407 projects. The vast majority of large enterprise support (95%) in Portugal has been committed by the Thematic Factors of Competitiveness Sectoral Operational Programme, which is the country's most relevant operational programme both in terms of value and project number.

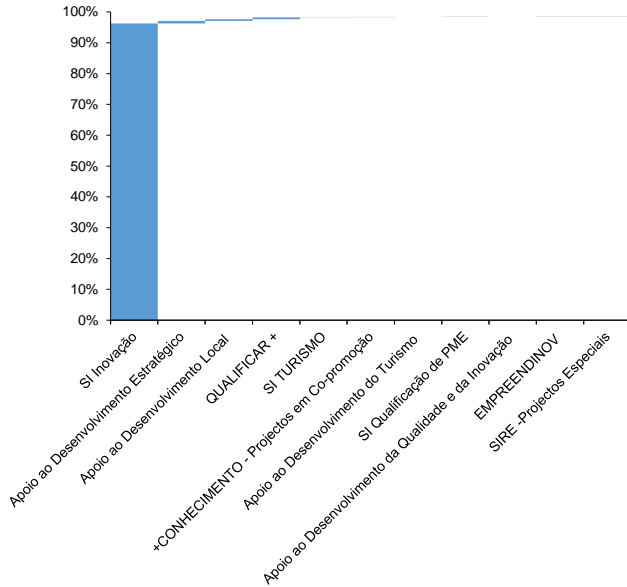
86. Figure: Number of projects and value of committed and paid support to large enterprises by operational programme in Portugal

Operational Programme	Committed support		Paid support	
	ERDF	nr of	ERDF	nr of
	(EUR mn)	projects	(EUR mn)	projects
ROP Azores	28	44	11	44
Thematic Factors of Competitiveness	1 072	315	706	315
ROP Algarve	6	5	5	5
ROP Centro	1	1	1	1
ROP Lisbon	13	18	4	18
Enhancement of Economic Potential and Territorial Cohesion	14	24	10	24
Total	1 134	407	736	407

The aid intensity for large enterprises on expenditure codes 05, 07 and 08 is an average of 32%: the total investment could reach EUR 3.6 billion.

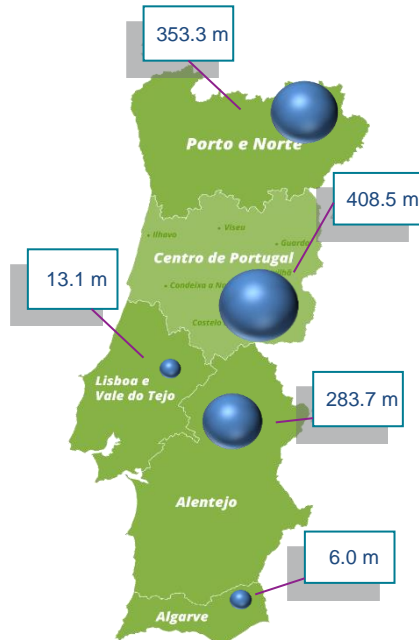
Below operational programme level the support is not recorded by measures. Records are kept however based on a thematic classification. Out of 11 categories, 96% of the funds have been awarded from "SI Inovação" (Incentive system innovation) which is the large majority of supported projects.

87. Figure: Distribution of committed support to large enterprises by measure in Portugal



Regional distribution

Three regions are leading in terms of committed large enterprise support, Centro, Norte and Alentejo.²⁴



²⁴ Azores and Madeira are not pictured on the map; to these regions the committed supports are EUR 28 mn and EUR 14.2 mn respectively.

1.7.3 Characteristics of supported large enterprises

Size of supported large enterprises

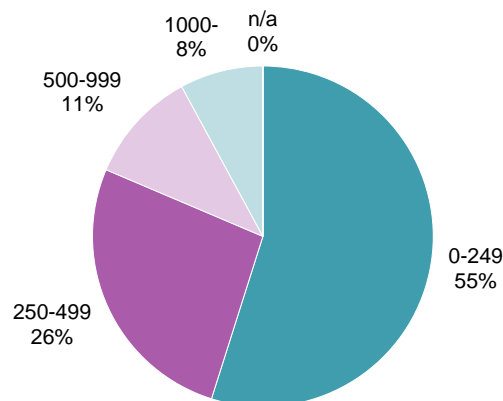
319 large enterprises have been supported, which corresponds to 27.5% of the number of active large enterprises in Portugal. One firm had 1.27 projects on average, which reveals that occasionally a firm applied multiple times during the period. The average amount of ERDF support has been nearly EUR 3.5 million per supported large enterprise.

88. Figure: Number of supported large enterprises, average amount of support and number of projects in Portugal

Number of supported large enterprises	Average amount of support per firm (EUR mn)	Average number of supported projects per firm
319	3.5	1.27

Nearly 55% of the supported Portuguese large enterprises employ less than 250 people. Only 17 of the supported enterprises employ more than 1000 people.

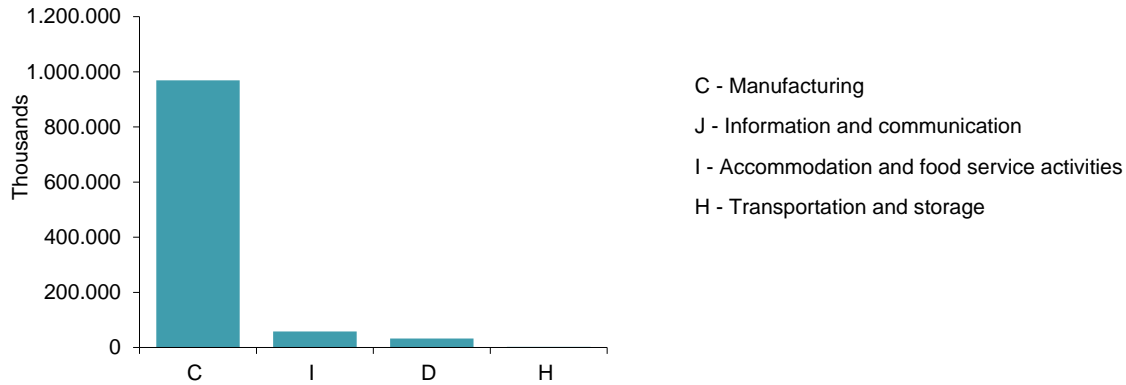
89. Figure: Distribution of supported large enterprises by employment category in Portugal



The following figure shows the industrial breakdown of the committed support. The manufacturing industry is the most relevant destination of the support, with enterprises in this industry gaining more than 90% of the total support. This corresponds to an amount that is more than sixteen times higher than that received by the second largest recipient industry, namely the accommodation and food service activities

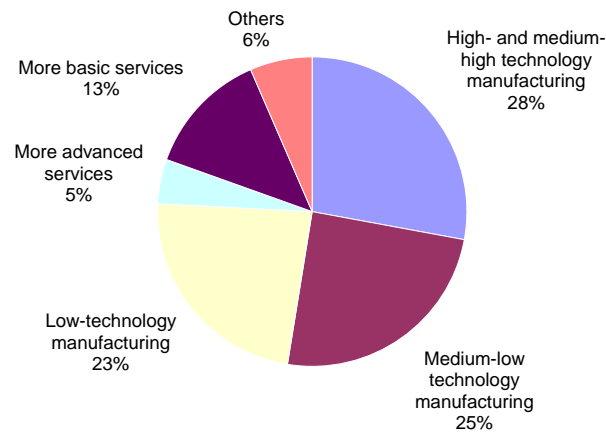
Sector of supported large enterprises

90. Figure: Distribution of total committed support to large enterprises by primary NACE code in Portugal



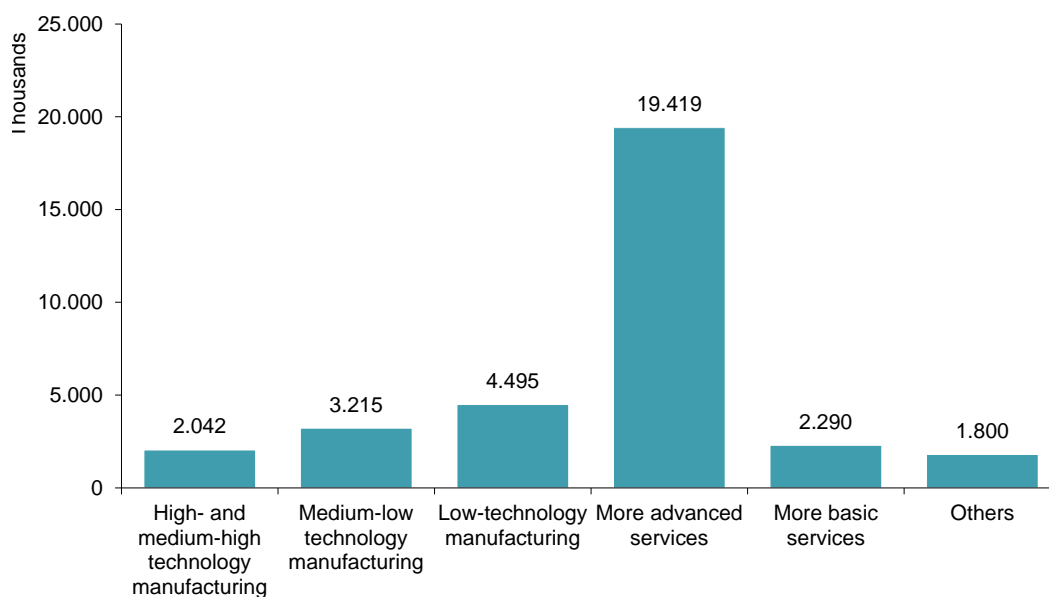
The next pie chart shows the sectoral categorisation of the large enterprises receiving support from ERDF. Almost 30% of the supported Portuguese large enterprises are high- and medium-high technology firms. The primary economic activity of 6% of the supported large enterprises falls outside of services and manufacturing.

91. Figure: Distribution of supported large enterprises by sectoral categorisation in Portugal



The average committed support by sector shows that low-technology manufacturers invest in larger projects than their peers among high- and medium-high-technology manufacturers. The highest average support has been committed to companies of more advanced services. Service providers (and mining and public utility enterprises as well) make up a minor share of supported enterprises, therefore the average committed support in these sectors is hard to compare to the others.

92. Figure: Average committed support by sectoral categorisation in Portugal



Categorisation based on leadership and geographical coverage

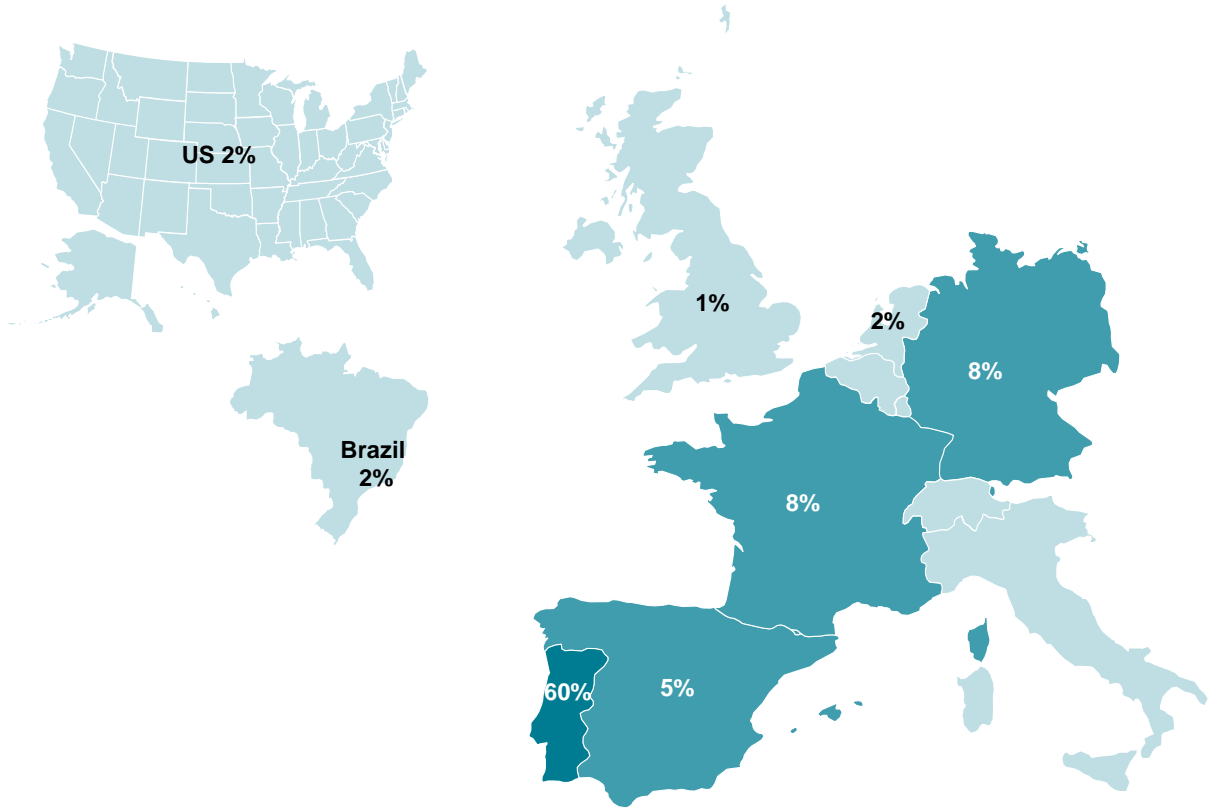
Out of the 319 supported enterprises, 215 could be classified based on their geographical coverage. The slight majority of supported large enterprises are multinational companies with a primary residence outside of the country.

93. Figure: Distribution of supported large enterprises by geographical coverage in Portugal

Distribution of large enterprises based on the geographical coverage		
Geographical Coverage	Operation in a large number of countries	Operation in a small number of countries
Foreign multinational companies	49	39
Domestic multinational companies	29	28
National companies	70	
Total	215	

The main countries of origin of foreign multinational companies are France, Germany and Spain.

94. Figure: Distribution of supported large enterprises by country of origin in Portugal



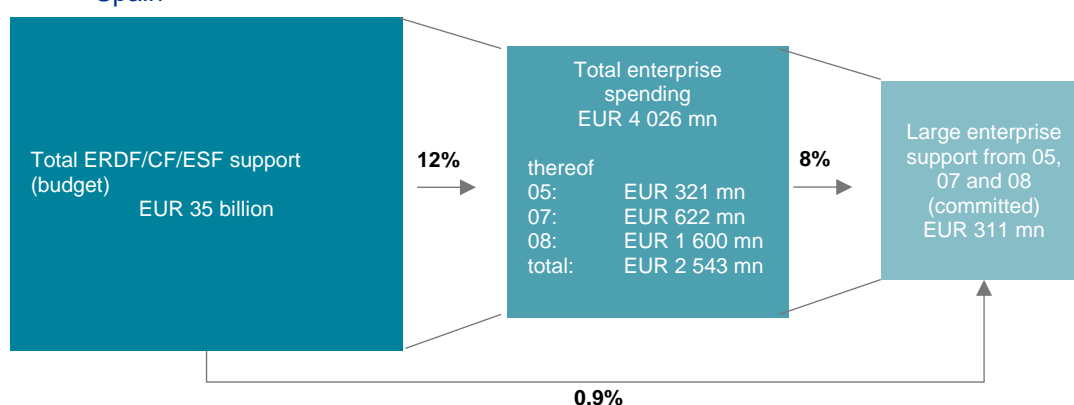
1.8 Spain

1.8.1 Share of large enterprise support

Nearly EUR 35 billion of ERDF/CF/ESF funding has been budgeted for Spain in the 2007-2013 programming period. The total committed amount at the end of 2013 was EUR 27 billion of ERDF/CF funding.

15% of the committed support of ERDF/CF has been accounted as total enterprise spending, from which 8% has been awarded to large enterprises, resulting in a 0.9% share of total large enterprise support from the budget in Spain.

95. Figure: Committed support by relevant expenditure codes and large enterprise status in Spain



In Spain twenty six operational programmes were implemented from ERDF. The large enterprise support from the relevant expenditure codes has been distributed among the following operational programmes:

96. Figure: The list of relevant operational programmes which included direct enterprise support on 05, 07 and 08 expenditure codes for large enterprises in Spain

Type of Operational Programmes	Relevant Operational Programmes
Sectoral	<ul style="list-style-type: none"> ■ Multi-regional Operational Programme ERDF R+D+I for and on behalf of companies (FT)
Regional	<ul style="list-style-type: none"> ■ R.O.P. ERDF de Andalucía (AN) ■ R.O.P. ERDF de Aragón (AR) ■ R.O.P. ERDF de Asturias (AS) ■ R.O.P. ERDF de Baleares (BB) ■ R.O.P. ERDF de Castilla y León (CL) ■ R.O.P. ERDF de Castilla la Mancha (CM) ■ R.O.P. ERDF de Cantabria (CN) ■ R.O.P. ERDF de Cataluña (CT) ■ R.O.P. ERDF de la Comunitat Valenciana (CV) ■ R.O.P. ERDF del País Vasco (EU) ■ R.O.P. ERDF de Extremadura (EX)

Type of Operational Programmes	Relevant Operational Programmes
	<ul style="list-style-type: none"> ■ R.O.P. ERDF de Galicia (GL) ■ R.O.P. ERDF de Canarias (IC) ■ R.O.P. ERDF de La Rioja (LR) ■ R.O.P. ERDF de Madrid (MD) ■ R.O.P. ERDF de la Región de Murcia (MU) ■ R.O.P. ERDF de Navarra (NA)

The average committed large enterprise support amounts to EUR 6.8 per capita and to EUR 95 per operating enterprise in the whole programming period.

The form of support has been mainly non-refundable support for small and medium enterprises and also for the large ones.

Contribution per Operational Programme		
ERDF	National contribution	Operational Programme
50%	50%	<ul style="list-style-type: none"> ■ R.O.P. ERDF de Aragón (AR) ■ R.O.P. ERDF de Baleares (BB) ■ R.O.P. ERDF de Cantabria (CN) ■ R.O.P. ERDF de Cataluña (CT) ■ R.O.P. ERDF del País Vasco (EU) ■ Multi regional O.P. ERDF R+D+I for and on behalf of companies (FT) ■ R.O.P. ERDF de La Rioja (LR) ■ R.O.P. ERDF de Madrid (MD) ■ R.O.P. ERDF de Navarra (NA)
80%	20%	<ul style="list-style-type: none"> ■ R.O.P. ERDF de Andalucía (AN) ■ R.O.P. ERDF de Asturias (AS) ■ R.O.P. ERDF de Castilla y León (CL) ■ R.O.P. ERDF de Castilla la Mancha (CM) ■ R.O.P. ERDF de la Comunitat Valenciana (CV) ■ R.O.P. ERDF de Extremadura (EX) ■ R.O.P. ERDF de Galicia (GL) ■ Multi regional O.P. ERDF R+D+I for and on behalf of companies (FT) ■ R.O.P. ERDF de la Región de Murcia (MU)
85%	15%	<ul style="list-style-type: none"> ■ R.O.P. ERDF de Canarias (IC)

EUR 311 million support has been committed to large enterprises in the 2007-2013 programming period. The share of national contribution is 50%, 20% or 15% depending on operational programmes, which means that 50%, 80% or 85% of support is financed from EU funds.

97. Figure: Breakdown of committed large enterprise support into ERDF and national contribution in Spain

Committed support (EUR mn)		
ERDF	National contribution	Total
311	88	399

There is no significant difference between the aid intensity regarding large enterprises and small and medium-sized enterprises. However, during the selection procedure the small and medium-sized enterprises are favoured through more points in the awarding criteria.

1.8.2 Key project level figures

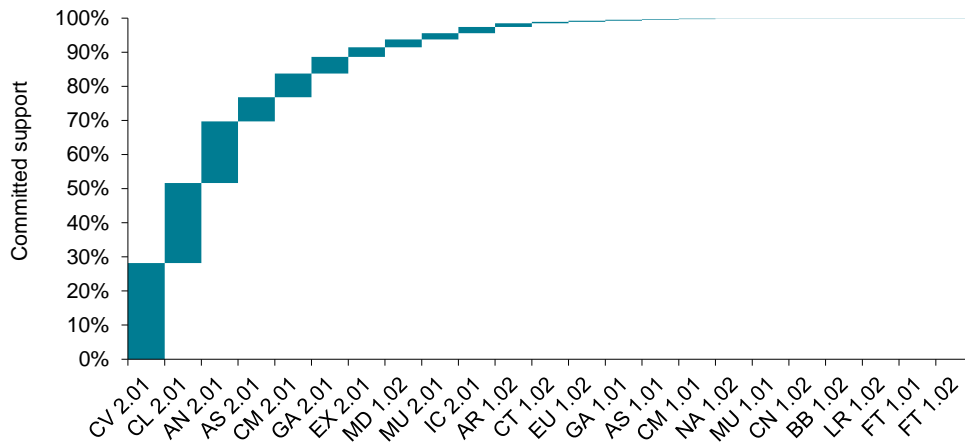
The amount of ERDF funds committed to large enterprises (EUR 311 million) has been realised through 1269 projects. However, 49% of the projects have not been contracted yet. 44% of the support has already been paid to the intermediate bodies (90% of the contracted support). The large majority of large enterprise support has been covered from the Regional Operational Programme ERDF de Cataluña (CT) (in terms of projects). In terms of amount, the most relevant operational programme is the Regional Operational Programme ERDF de la Comunitat Valenciana (CV).

98. Figure: Number of projects and value of requested, committed, contracted and paid support to large enterprises by operational programme in Spain

Operational Programme	Committed support		Contracted support		Paid support	
	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects	ERDF (EUR mn)	nr of projects
PO FEDER de Andalucía	56	127	27	119	25	101
PO FEDER de Aragón	3	35	0	29	0	29
PO FEDER de Asturias	23	60	23	58	19	51
PO FEDER de Baleares	0	2	0	2	0	2
PO FEDER de Castilla y León	73	104	24	90	23	74
PO FEDER de Castilla la Mancha	22	28	15	17	15	20
PO FEDER de Cantabria	0	30	0	30	0	30
PO FEDER de Cataluña	1	235	1	235	1	235
PO FEDER de la Comunitat Valenciana	88	120	39	115	30	35
PO FEDER del País Vasco	1	228	1	217	1	219
PO FEDER de Extremadura	9	18	9	17	9	18
PO FEDER de I+D+i por y para el beneficio de las empresas (Fondo Tecnológico)	0	2	0	1	0	1
PO FEDER de Galicia	16	55	2	29	2	29
PO FEDER de Canarias	6	4	3	2	4	3
PO FEDER de La Rioja	0	4	0	4	0	3
PO FEDER de Madrid	7	164	5	160	4	108
PO FEDER de la Región de Murcia	6	30	5	25	5	25
PO FEDER de Navarra	0	23	0	23	0	23
Total	311	1 269	155	1 173	138	1 006

Twenty three measures among the eighteen operational programmes supported large enterprises. 28% of the funds have been awarded from the CV-2.1. measure.

99. Figure: Distribution of committed support to large enterprises by measure in Spain



Regional distribution

Three regions are leading in terms of committed large enterprise support: Comunidad Valenciana in the eastern, Castilla Leon in the central, and Andalucía in the southern part of the country. In addition, competitiveness regions (Aragón, Baleares, Cantabria, Cataluña, País Vasco, La Rioja, Madrid and Navarra) are less represented.

100. Figure: Committed support to large enterprises by region in Spain



1.8.3 Characteristics of supported large enterprises

Size of supported large enterprises

398 large enterprises have been supported, which corresponds to 7% of the number of active large enterprises in Spain. The results confirm that the ERDF supported more than three projects per company. The average amount of ERDF support has been nearly EUR 800,000 per supported large enterprise. The number of projects per supported enterprise is the highest, while the average amount of support is the lowest in Spain among the eight countries investigated in this report. In particular, in Spain there are a lot of small, i.e. below EUR 5,000 value projects.²⁵ As this pattern seems to be different from that observable for the other countries in scope, this topic will be further addressed during the case study phase.

²⁵ At this point of the evaluation our initial hypothesis is that large enterprises were supported to appear on international fairs in order to promote their export activities. These 'projects' were limited to operational and / or administrative costs related to a one-two day event.

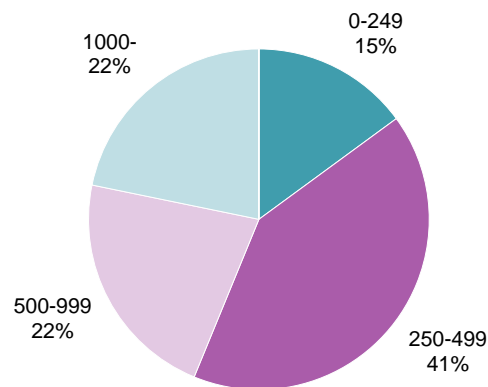
101. Figure: Number of supported large enterprises, average amount of support and

Number of supported large enterprises	Average amount of support per firm (EUR mn)	Average number of supported projects per firm
398	0.8	3.18

number of projects in Spain

Nearly half of the supported Spanish large enterprises employ more than 250 but less than 500 people. 20% of the supported enterprises employ more than 1000 people, while the biggest employer has more than 38 000 employees.

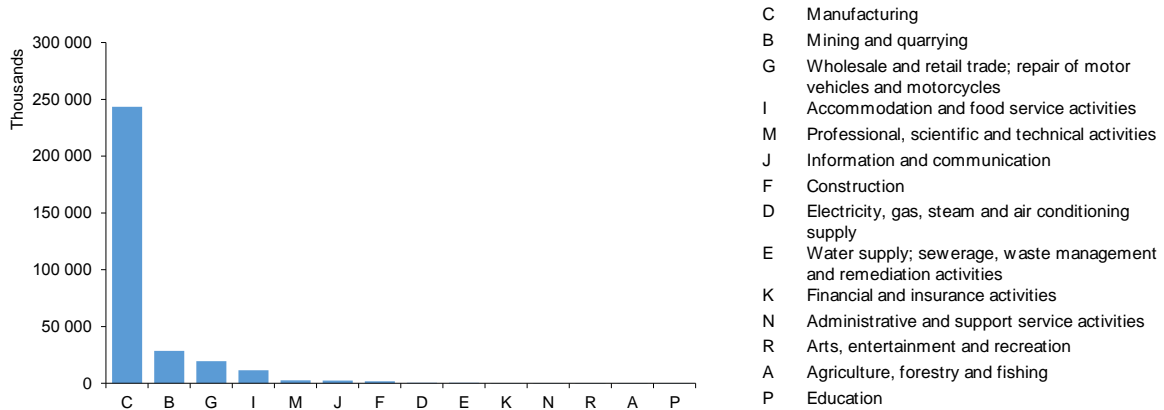
102. Figure: Distribution of supported large enterprises by employment category in Spain



The following figure shows the industrial breakdown of the committed support. Manufacturing industry is the most relevant destination of the support, with large enterprises operating in this industry gaining nearly 78% of the support. This corresponds to an amount that is almost five times higher than that received by the second (mining and quarrying activities) and the third (wholesale and retail trade) largest recipient industries combined.

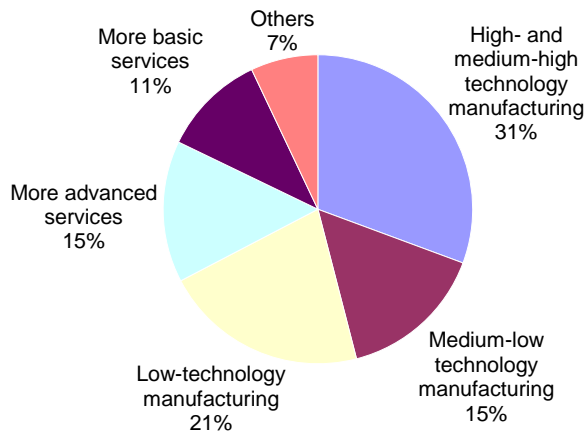
Sector of supported large enterprises

103. Figure: Distribution of committed support to large enterprises by primary NACE code in Spain



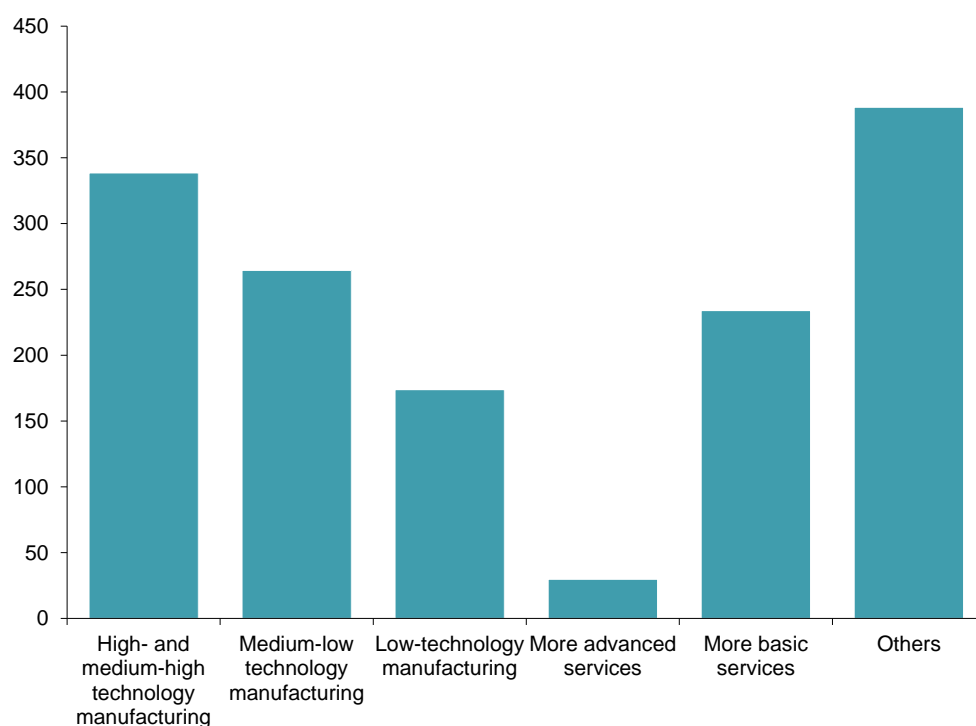
The next pie chart shows the sectoral categorisation of the large enterprises receiving support from ERDF. 31% of the supported Spanish large enterprises are high- and medium-high technology firms. Compared to that the share of service provider enterprises is relatively low, only 15%. The primary economic activity of 7% of the supported large enterprises falls outside of services and manufacturing.

104. Figure: Distribution of supported large enterprises by sectoral categorisation in Spain



The average committed support by sector confirms that high- and medium-high-technology manufacturers invest in larger projects than their peers among less developed technology manufacturers and less advanced service providers. Surprisingly, the highest average support has been committed to mining projects.

105. Figure: Average committed support by sectoral categorisation in Spain (in thousands)



Categorisation based on leadership and geographical coverage

The majority of supported large enterprises are domestic multinational companies which operate in a large number of countries.

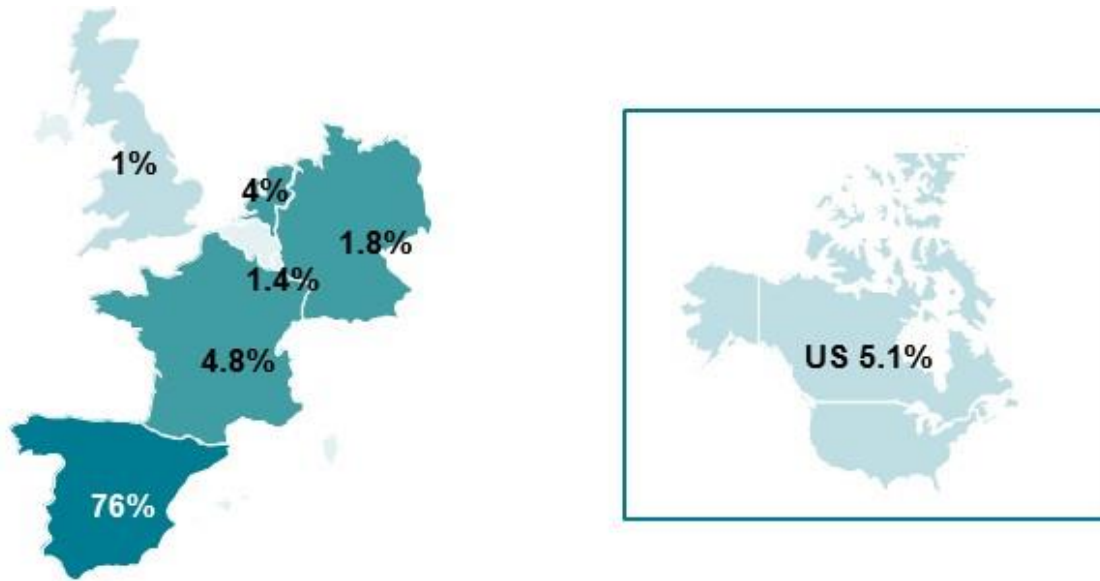
106. Figure: Distribution of supported large enterprises by geographical coverage in Spain

Distribution of large enterprises based on the geographical coverage		
Geographical Coverage	Operation in a large number of countries	Operation in a small number of countries
Foreign multinational companies	44	31
Domestic multinational companies	189	49
National companies		12
Total ²⁶		322

The main countries of origin of foreign multinational companies are France, the Netherlands and Germany. A number of companies are headquartered in the United States, and even outside of Europe, such as in Japan, India, Canada or the United Arab Emirates.

²⁶ Information on geographical coverage and number of countries where the companies operate have been collected from an external database. Some of the missing companies (23) are already under liquidation, and in some cases information on the geographical coverage is not available.

107. Figure: Distribution of supported large enterprises by country of origin in Spain



2 Reasoning for case study selection

2.1 Overview

This document aims to propose case study operational programmes based on the criteria set in the Tender specifications for the purpose of the 'Ex post evaluation of Cohesion Policy programmes 2007-2013, financed by the ERDF and CF, **Work Package 4: Support to large enterprises**'.

According to the Tender specifications, the evaluators have to select one operational programme from each country in scope based on the following criteria:

- The programme provides significant support to large enterprises ('Significance of support');
- The forms/packages of support and rationale are broadly representative of large enterprise spending at the national level ('Representativeness');
- The extent to which data is available for the tasks to be carried out in the case studies, availability of counterfactual impact evaluations for comparison ('Availability of counterfactual impact evaluations for comparison').

Based on the three criteria and the currently available set of information,²⁷ we propose to select the following case study operational programmes.

Country	Proposed case study
Austria	Operational Programme Styria 2007-2013
Czech Republic	Operational Programme Enterprise and Innovation
Germany	Operational Programme Thuringia 2007-2013
Hungary	Economic Development Operational Programme
Italy	National Operational Programme for Research and Competitiveness
Poland	Operational Programme Innovative Economy
Portugal	Operational Programme Thematic Factors of Competitiveness
Spain	Comunidad Valenciana Operational Programme

The following sections include the reasoning for the above proposed case studies in a breakdown of countries.

²⁷ The values and numbers on large enterprise support in the original version of this document have changed as a result of developing project progress.

2.2 Reasoning for the proposed case study operational programmes

2.2.1 Austria

For the Austrian case we propose to select the ERDF **Operational Programme Styria 2007-2013** under the Regional Competitiveness and Employment objective.

2.2.1.1 Significance of support

Out of nine operational programmes implemented in Austria eight fall under the Regional Competitiveness and Employment objective. As the operational programmes under the Regional Competitiveness and Employment objective are the prevalent form of ERDF support in Austria, we propose to select a Regional Competitiveness and Employment Operational Programme for the Austrian case study.

Among the Austrian Regional Competitiveness and Employment operational programmes the Operational Programme Styria accounts for the highest amount of ERDF funding committed to large enterprises under codes 05, 07 and 08. It also accounts for the highest number of supported large enterprise projects among all Austrian operational programmes. Moreover, the Operational Programme Styria represents 24% of the Austrian ERDF support towards large enterprises and 37% of large enterprise projects under the specified codes. It provides significant support to large enterprises, which highlights Styria as a case study region.

2.2.1.2 Representativeness

All Austrian operational programmes are regional ones. Interventions mostly support productive investment projects under code 08 (58%) and investment projects linked to RTD under code 07 (40%). The Operational Programme Styria supported a significant number of projects in each of the two codes, thus both areas of support can be analysed in a Styrian case study.

2.2.1.3 Availability of counterfactual impact evaluations for comparison

The third criteria does not differentiate among the operational programmes which have supported large enterprises from the 05, 07 and 08 expenditure codes in Austria. Namely,

- the evaluators could not identify any counterfactual impact assessments for any of the operational programmes in the 2007-2013 programming period which could serve as a comparison for the future result of this evaluation;
- general evaluation studies are available for all operational programmes;
- availability of data for the tasks to be carried out is expected to be available with equal probability for the operational programmes.

2.2.1.4 Summary

Based on all criteria, we propose that the **Operational Programme Styria 2007-2013** would best serve the purpose of the evaluation as a case study for Austria.

2.2.2 Czech Republic

For the Czech Republic case we propose to select the **Operational Programme Enterprise and Innovation**.

2.2.2.1 Significance of support

All of the support towards large enterprises have been awarded through the Operational Programme Enterprise and Innovation, therefore it appears to be a clear choice for the Czech Republic.

2.2.2.2 Representativeness

For the Czech Republic case the national-level representativeness of form, support and rationale further confirms the choice based on the first criteria. The Operational Programme Enterprise and Innovation consists of eight calls for proposal from 2008 to 2013 supporting large enterprises with three main areas of support (Innovative projects, ICT and Strategic Services, Property (real estate)). The distribution of the calls among these three areas is nearly even through the examined time horizon. The three types of calls were continuously launched over the years, which emphasises the importance of their subject.

Other operational programmes are not relevant from the representativeness perspective considering that support to large enterprises does not appear in their agenda.

2.2.2.3 Availability of counterfactual impact evaluations for comparison

The evaluators have identified one counterfactual impact evaluation for the operational programmes in the 2007-2013 programming period which could serve as a comparison for the future result of this evaluation. This evaluation ('Evaluation of economic effects and conditions set programs to support innovation, collaboration and potential OPEI') was focused on the Operational Programme Enterprise and Innovation. For the purpose of this document a counterfactual approach was used; however, the sample includes all enterprises, not only large ones. The report could serve as basis for comparison, even though there are no separate estimates of the effects for large enterprises.

Data required for an evaluation are expected to be available with equal probability for the operational programmes (e.g. the beneficiary data is jointly managed). However, the evaluators are familiar with the Managing Authority of the Operational Programme Enterprise and Innovation, which could support the organisation of interviews and information requests.

2.2.2.4 Summary

Based on all criteria, the **Operational Programme Enterprise and Innovation** would best serve the purpose of the evaluation as a case study for the Czech Republic.

2.2.3 Germany

For the German case we propose to select the ERDF **Operational Programme Thuringia 2007-2013** under the Convergence Objective.

2.2.3.1 Significance of support

Among the German operational programmes the Operational Programme Thuringia accounts for the highest number of supported large enterprise projects and the second highest amount of ERDF funding committed to large enterprises under codes 05, 07 and 08 (closely following Saxony-Anhalt). It represents 28% of the German ERDF support towards large enterprises and 33% of large enterprise projects under the specified codes. Thuringia provides significant support to large enterprises and is therefore highlighted as a case study region.

2.2.3.2 Representativeness

All German operational programmes are regional ones. ERDF funding is implemented under the Regional Competitiveness and Employment Objective (11 operational programmes) in the old Länder and under the Convergence Objective (6 operational programmes) in the new Länder and the Lower Saxon region of Luneburg. The convergence operational programmes in the new Länder account for a significantly higher amount of ERDF funds spent on large enterprises and large enterprise projects under codes 05, 07 and 08.

German operational programmes that support large enterprise projects in the specified codes, focus strongly on code 08. All operational programmes include a common type of intervention supporting productive investment (Einzelbetriebliche Investitionsförderung). This intervention is often combined with national funding under the Joint Agreement for the Improvement of Regional Economic Structures. The Operational Programme Thuringia supported 157 projects under this characteristic intervention and is therefore a good case for studying productive investment support in Germany. It also funded a smaller number of projects under an intervention focusing on research and technological development (RTD) and innovation (Einzelbetriebliche Technologieförderung) under code 07. The Operational Programme Thuringia therefore also allows to gain further insight on this less extended form of support within the specified codes.

2.2.3.3 Availability of counterfactual impact evaluations for comparison

The third criteria does support the selection of the Operational Programme Thuringia, although without a clear distinction. Counterfactual impact analysis is available jointly for the new Länder. Furthermore, (midterm) evaluations analysing enterprise support, but not using counterfactual methods, are available for several German ERDF operational programmes including the Operational Programme Thuringia.

The choice of Thuringia as the German case study region is supported by the explicit mentioning of large enterprise investment support in the Operational Programme Thuringia which is not common in the German operational programmes. This might highlight a greater openness towards the evaluation of large enterprise support. During the data request process the Managing Authority of Thuringia also seemed to be very efficient in handling beneficiary data which could be a supportive factor for a case study.

2.2.3.4 Summary

Based on all criteria, the **Operational Programme Thuringia 2007-2013** would best serve the purpose of the evaluation as a case study for Germany.

2.2.4 Hungary

For the Hungarian case we propose to select the **Economic Development Operational Programme**.

2.2.4.1 Significance of support

More than 80% of the support towards large enterprises has been awarded through the Economic Development Operational Programme. The amount of Economic Development Operational Programme support clearly peaks out compared to the other operational programmes in terms of requested, committed and contracted support: based on the first criteria ('programme provides significant support to large enterprises'), the Economic Development Operational Programme seems to be a clear choice for Hungary.

2.2.4.2 Representativeness

For the Hungarian case the national-level representativeness of form, support and rationale further confirms the choice based on the first criteria. The eight selected operational programmes consist of 80 calls from 2007 to 2012. The Economic Development Operational Programme has the biggest share from the calls, with 37.5%, for proposal supporting large enterprises with several areas of support. The second biggest share belongs to the Central Hungary Operational Programme with 19 calls, which represents nearly 24% of the total.

Other relevant operational programmes are regional ones, with narrower scales in terms of the number of calls for proposal. The main areas of support, which were innovation and R&D, industry and business infrastructure development projects, remained consistent throughout the examined time period.

2.2.4.3 Availability of counterfactual impact evaluations for comparison

The third criteria does not differentiate among the operational programmes which have supported large enterprises from the 05, 07 and 08 expenditure codes in Hungary. Specifically:

- the evaluators could not identify any counterfactual impact assessments for any of the operational programmes in the 2007-2013 programming period which could serve as a comparison for the future result of this evaluation;
- availability of data for the tasks to be carried out is expected to be satisfied with equal probability for the operational programmes (e.g. the beneficiary data is jointly managed). However, the evaluators are familiar with the Managing Authority of the Economic Development Operational Programme, which could support the organisation of interviews and information requests.

2.2.4.4 Summary

Based on all criteria, the **Economic Development Operational Programme** would best serve the purpose of the evaluation as a case study for Hungary.

2.2.5 Italy

For the Italian case we propose to select the **National Operational Programme for Research and competitiveness**.

2.2.5.1 Significance of support

More than 63% of the support towards large enterprises has been awarded through the National Operational Programme for Research and Competitiveness. The amount of support provided by the Operational Programme Research and Competitiveness clearly peaks out compared to the other operational programmes in terms of requested, committed and paid support: based on the first criteria ('programme provides significant support to large enterprises'), the National Operational Programme for Research and Competitiveness appears to be a clear choice for Italy.

2.2.5.2 Representativeness

For the Italian case the national-level representativeness of form, support and rationale further confirms the choice based on the first criteria. The relevant operational programmes consist of 48 calls from 2007 to 2013. The National Operational Programme for Research and Competitiveness consists of eleven calls, which represents one fourth of the total number of calls for proposal supporting large enterprises, mainly focusing on innovation and technological innovation.

Other relevant operational programmes are mainly regional ones, therefore smaller in scale, with an average of 3 calls per operational programme, and a wide variety of supported areas.

2.2.5.3 Availability of counterfactual impact evaluations for comparison

With regard to the third criteria, more counterfactual impact assessments are available for the National Operational Programme Research and Competitiveness, than for any other relevant operational programme in the 2007-2013 programming period. These assessments could serve as a comparison for the future result of this evaluation.

2.2.5.4 Summary

Based on all criteria, the **National Operational Programme for Research and Competitiveness** would best serve the purpose of the evaluation as a case study for Italy.

2.2.6 Poland

For the Polish case we propose to select the Operational Programme Innovative Economy.

2.2.6.1 Significance of support

Almost 85% of the support towards large enterprises has been awarded through the Operational Programme Innovative Economy. The amount of support under the frame of Operational Programme Innovative Economy clearly peaks out compared to the other operational programmes in terms of requested and committed support. As a result, based on the first criteria ('programme provides significant support to large enterprises'), the Operational Programme Innovative Economy appears to be a clear choice for Poland.

2.2.6.2 Representativeness

For the Polish case the national-level representativeness of form, support and rationale further confirms the choice based on the first criteria. The relevant operational programmes consist of 137 calls from 2007 to 2014. The Operational Programme Innovative Economy consists of 42 calls for proposal supporting large enterprises with several areas of support, representing nearly 31% of the total number of calls.

Other relevant operational programmes are regional ones and therefore smaller in scale in terms of the number of calls for proposal, with several supported areas.

2.2.6.3 Availability of counterfactual impact evaluations for comparison

The evaluators have identified two evaluation documents which use a counterfactual approach and can serve as comparison. The 'Evaluation of the effects of support to large enterprises during the implementation of cohesion policy in Poland' assesses the Innovative Economy Operational Programme, the regional operational programmes and the Operational Programme Development of Eastern Poland as well. The 'Mid-term assessment of implementation of 3, 4, 5 and 6 priorities within OP IE' assesses large enterprises as well and could be used for comparison, even though there is no separate impact assessment for support to small- and medium and large enterprises.

Based on the third criteria, the Operational Programme Innovative Economy would be the most favourable case study choice as both assessment documents include analyses regarding the impact of support provided by this operational programme.

2.2.6.4 Summary

Based on all criteria, the **Operational Programme Innovative Economy** would best serve the purpose of the evaluation as a case study for Poland.

2.2.7 Portugal

For the Portuguese case we propose to select the **Operational Programme 'Thematic Factors of Competitiveness'**.

2.2.7.1 Significance of support

94% of the support towards large enterprises has been awarded through the **Operational Programme "Thematic Factors of Competitiveness"**. 77% of the supported projects have been awarded through the same operational programme. The amount of support clearly peaks out compared to the other operational programmes in terms of committed and paid support. Thus, based on the first criteria ('programme provides significant support to large enterprises'), this operational programme appears to be a clear choice for Portugal.

2.2.7.2 Representativeness

For the Portuguese case, there are both regional and thematic operational programmes, one of which is linked to business activity, namely the Factors of Competitiveness Operational Programme. Under this programme, incentives for research and technological development for enterprises and innovation are provided, consisting of different measures with several areas of support. Other relevant operational programmes are regional ones and therefore smaller in scale in terms of the number of calls for proposal.

2.2.7.3 Availability of counterfactual impact evaluations for comparison

The third criteria does not differentiate between the operational programmes which have supported large enterprises from the 05, 07 and 08 expenditure codes in Portugal. In particular:

- the evaluators could not identify any counterfactual impact assessments for any of the operational programmes in the 2007-2013 programming period which could serve as a comparison for the future result of this evaluation. Another counterfactual analysis has been prepared for the former programming period 2000-2006, focusing on the impact of enterprise support regarding the PRIME Incentive Programme for the Modernisation of the Economy.
- availability of data for the tasks to be carried out is expected to be met with equal probability for the operational programmes (e.g. Agência para o Desenvolvimento e Coesão supervises and coordinates all programmes).

2.2.7.4 Summary

Based on all criteria, the Thematic Factors of Competitiveness Operational Programme would best serve the purpose of the evaluation as a case study.

2.2.8 Spain

For the Spanish case we propose to select the **Comunidad Valenciana Operational Programme**.

2.2.8.1 Significance of support

More than 28% of the support towards large enterprises have been awarded through the Comunidad Valenciana Operational Programme.

2.2.8.2 Representativeness

For the Spanish case the national-level representativeness of form, support and rationale is not contrary to the choice based on the first criteria. The Comunidad Valenciana Operational Programme consists of numerous calls for proposal supporting large enterprises with several areas of support. The number of relevant calls is nearly the same for all operational programmes except for two regional ones. The most calls have been announced within the Andalucía and Asturias Operational Programmes; however, these include some calls which have been repeated several times during the programming period and handled separately.

2.2.8.3 Availability of counterfactual impact evaluations for comparison

The third criteria does not differentiate among the operational programmes which have supported large enterprises from the 05, 07 and 08 expenditure codes in Spain. In particular:

- the evaluators could not identify any counterfactual impact assessments for any of the operational programmes in the 2007-2013 programming period, which could have served as comparison for the future result of this evaluation;
- availability of data for the tasks to be carried out is expected to be met with equal probability for the operational programmes (e.g. beneficiary data have been managed jointly).

2.2.8.4 Summary

Based on all criteria, the Comunidad Valenciana Operational Programme would best serve the purpose of the evaluation as a case study for Spain.

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