



Evaluation Network

15-16 December 2022, Albert Borschette Conference
Centre, Brussels

REGIO B2

Agenda – Thursday, 15/12

- 14.30 - Introduction, approval of the agenda and minutes of the last meeting
- 14.45 - Annual Summary of Implementation Reports 2014-2020 and Summary of MS evaluations
- 15:30 - Coffee break
- 16:00 - Indicators and SFC 2021 Q&A on SFC2021
- 16:30 - Next developments on the Open Data Platform
- 17:15 - Networking



2022 Annual Summary Report in a nutshell



Scope

- 7th report so far (one more to go)
- Based on 2021 annual implementation reports submitted by the Member States
- Implementation period covered: 2014-2020
- Also financial data up to 30 September 2022



- Cohesion policy - balancing act between strategic mission and responding to different crises
- ESI Funds have been the main tool for the EU to provide public finance support to clean energy
- 2021-2027 period - €370 billion available for a more inclusive Europe and a greener, low-carbon economy

Implementation



- Payment rate has increased from 55% to 64% by the end of 2021;
- Indicator values show progress:
 - 4 million enterprises supported;
 - 310 000 new jobs were created with ERDF support;
 - 460 000 households improved energy efficiency ;
 - extra 3 600 MW energy production capacity coming from renewable energy resources
 - annual primary energy consumption of public buildings reduced by 2.6 terawatt hours/year
 - 45.3 million participants benefitted from the ESF and Youth Employment Initiative-supported projects;

Covid-19 - crisis response

Recovery Assistance for Cohesion and the Territories of Europe (REACT-EU)



- €50.6 billion made available for 2021-2022 (in 2 tranches)
- support to healthcare, workers and businesses and at the same time focusing on green and digital regional investments

COVID-19 indicators:

- 2.8 billion items of personal protective equipment bought (84% of target)
- 11 000 ventilators purchase (84% of target)
- 805 000 SMEs supported with working capital (78% of target)

Key themes

Smart growth



- Out of €212 billion available, €131 billion already spent (62%)
- 60 000 enterprises cooperated with research institutions

Sustainable growth

- Out of €279 billion available, €174 billion already spent (63%)
- 460 000 households benefitted from the improved energy performance conditions



Inclusive growth



- Out of €173 billion available, €114 billion already spent (66%)
- 6.4 million people had found a job thanks to ESF and YEI support.

Other themes



Public administration

- €6.4 billion planned, €3.7 billion already spent (58%)
- 3 000 projects targeting public administrations



Territorial & urban development

- €32 billion planned, €17 billion already spent (52%)
- 26 000 renovated housing units



Territorial cooperation

- €13 billion planned, €8 billion already spent (64%)
- 165 000 people benefitted from cross-border mobility initiatives



SWD 2022 on evaluation findings of ESIF programmes

SWD on evaluation findings

Regulatory requirement
art. 53 CPR

Accompanies Annual Summary Report
adoption planned Jan 23

Based on evaluation summaries and AIRs



Covers all ESIF programmes

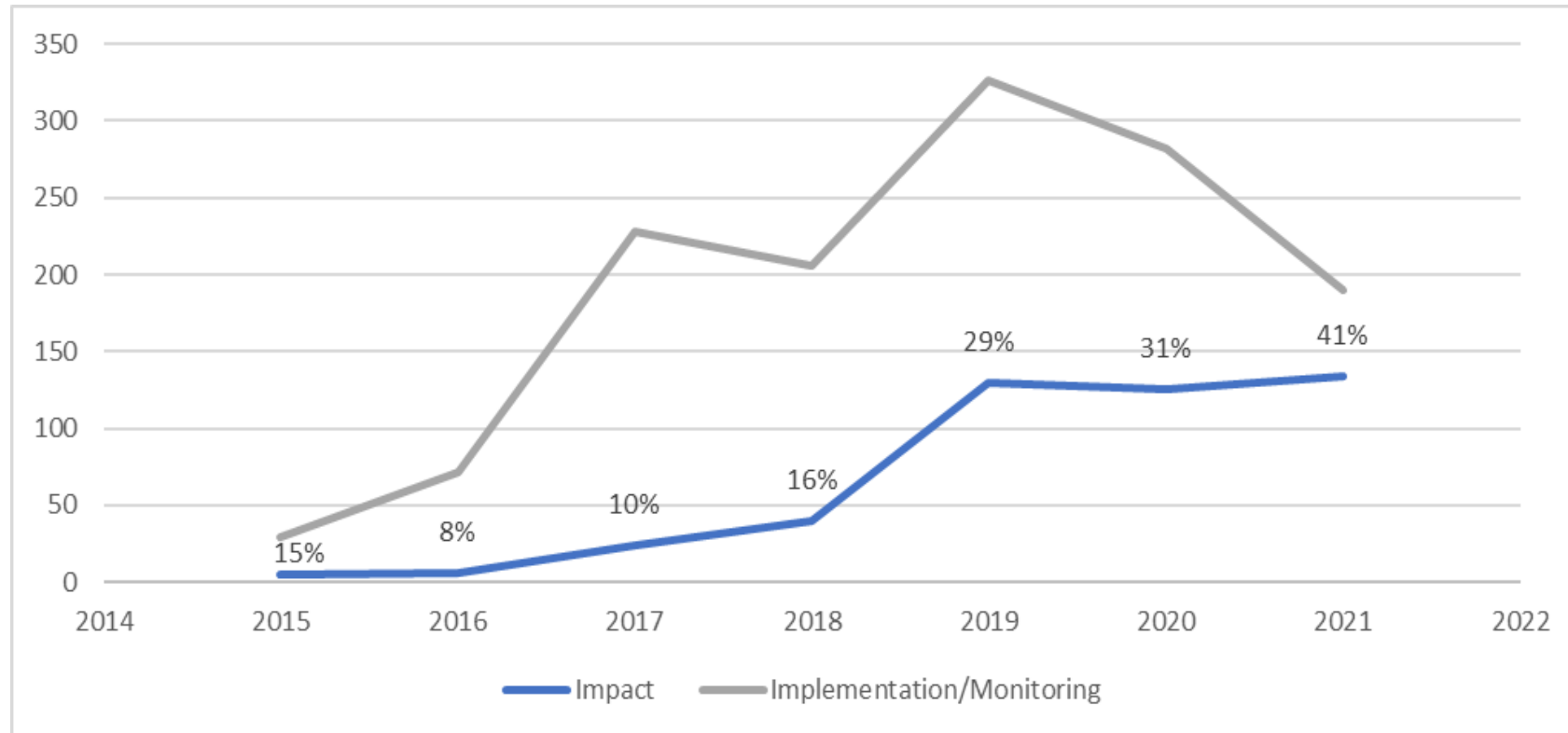
REGIO, EMPL, AGRI, MARE
NB: Presentation focused on Cohesion Policy

Organised by policy area and theme

Evaluation work in the Member States

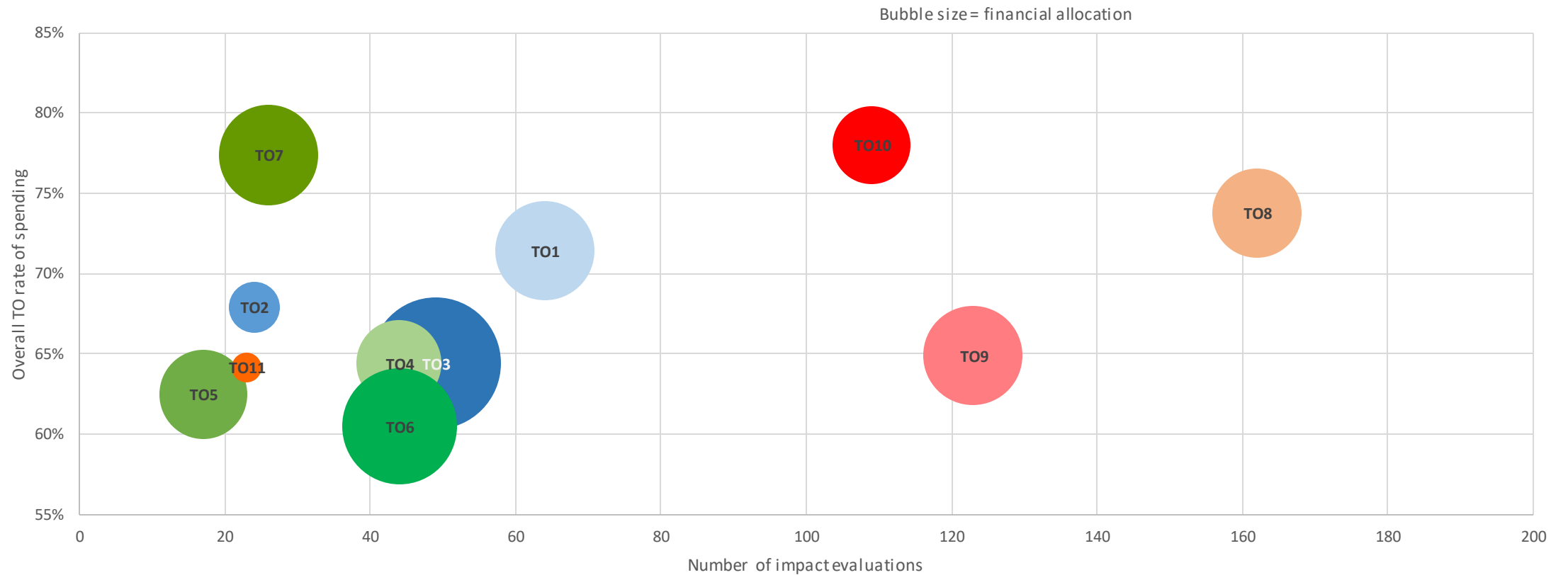
- 1 800 MS evaluations on 2014-2020 programmes
- In 2021 more focus on impact (+7%, while total number -20%)
- Results are specific to the local contexts by design, common findings and contrasting evidence
- Crisis effect: difficulties in achieving targets for energy efficiency measures in housing sector and urban regeneration due to price increase of raw materials
- Few evaluations have addressed the COVID-19 pandemic so far

Impact evaluations over time



- ❖ More than half of impact-oriented evaluations use advanced methods (counterfactual, theory-based or cost-benefit analysis)

Impact evaluations by thematic objective



Tour de table

- Evaluation activities on 2014-2020 programmes in the MS
 - Planned and ongoing evaluations?
 - Activities linked to COVID response and REACT-EU?



2021-2027 Common Indicators

Topics

- Staff Working Documents (SWD) 2021 with Common indicator definitions
- FAQ on SFC2021 with clarifications (some corrections to SWD flagged)
- Use of Common Indicators
- Issues to assess / follow up
 - Benchmarking targets / outliers
 - Reporting implementation (=> OPEN DATA presentation)
 - Result indicators: reviewing targets - Mid Term review after selection experience

SFC2021 – ERDF/CF/JTF FAQ

- We have encoded the Q+A based on their potential interest to a wide audience
- Grouped Q+A
 - Indicator coverage
 - General Guidance
 - Output indicator
 - Result Indicators
- Mixed EN/FR Q+A

FAQ on ERDF/CF/JTF Monitoring

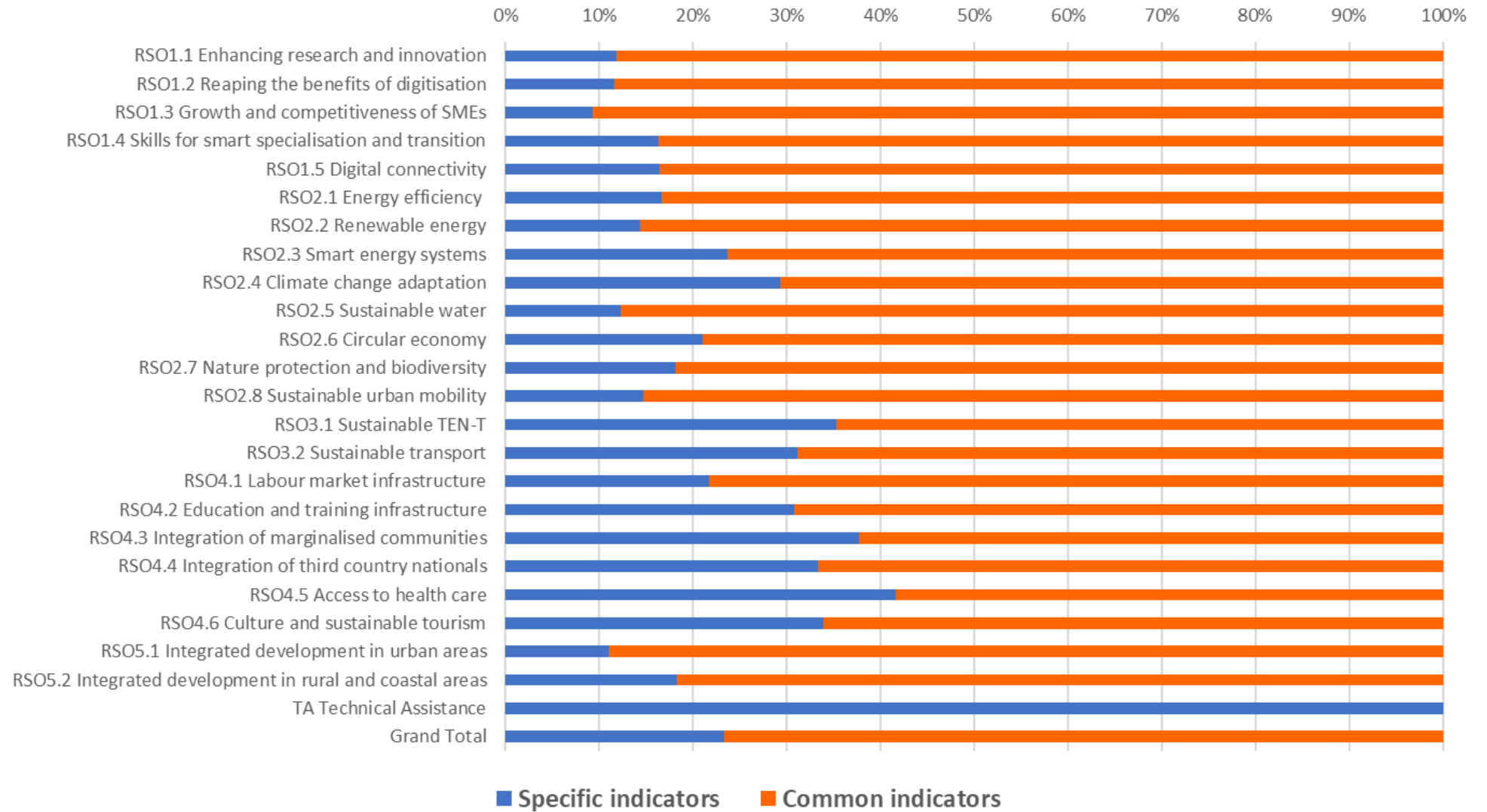
- The FAQ includes questions that have been submitted by MA during the negotiation of programmes process – they are now publicly available on **SFC2021**;
- Access: SFC2021 > Support Material > Monitoring > ERDF/CF/JTF Monitoring and evaluation > FAQ

The screenshot displays the SFC2021 website interface. At the top, a navigation bar includes links for SFC2021, SFC2014, and SFC2007. Below this, a secondary menu features 'About SFC2021', 'News', 'SFC2021 Access', 'Support Material', 'WebServices', 'MS Liaison Area', 'MySFC', and 'Contact'. The 'Support Material' link is highlighted with a red box. The breadcrumb trail reads: Home > ... > ERDF/CF/JTF Monitoring & Evaluation | 2021 Support Materials MS > ERDF/CF/JTF Monitoring & Evaluation | 2021 Support Materials MS. The main heading is 'ERDF/CF/JTF Monitoring & Evaluation | 2021 Support Materials MS'. On the left, a sidebar menu lists categories: General, Strategic Planning, Programming Application (EGF), Monitoring (with sub-items: Monitoring committee, Performance Review, Enabling Conditions, ESF Monitoring FAQ, and ERDF/CF/JTF Monitoring & Evaluation), Execution, Audit, and Utilities. The 'ERDF/CF/JTF Monitoring & Evaluation' item is highlighted with a red arrow. A search bar at the top right contains the text 'Search Support Materials MS'. Below the search bar, a red arrow points to the 'F.A.Q.' tab in a navigation menu that also includes 'Quick guide', 'Documents', and 'Videos'. The content area shows a 'Guidance' section with a question: 'Par ailleurs, quelles pièces justificatives pourront être légitimement attendues du porteur de projet sur les indicateurs de résultat d'innovation dans les PME (RCR05, RCR03, RCR04) ?'. The Windows taskbar at the bottom shows the time as 14:04 on 13-12-2022.

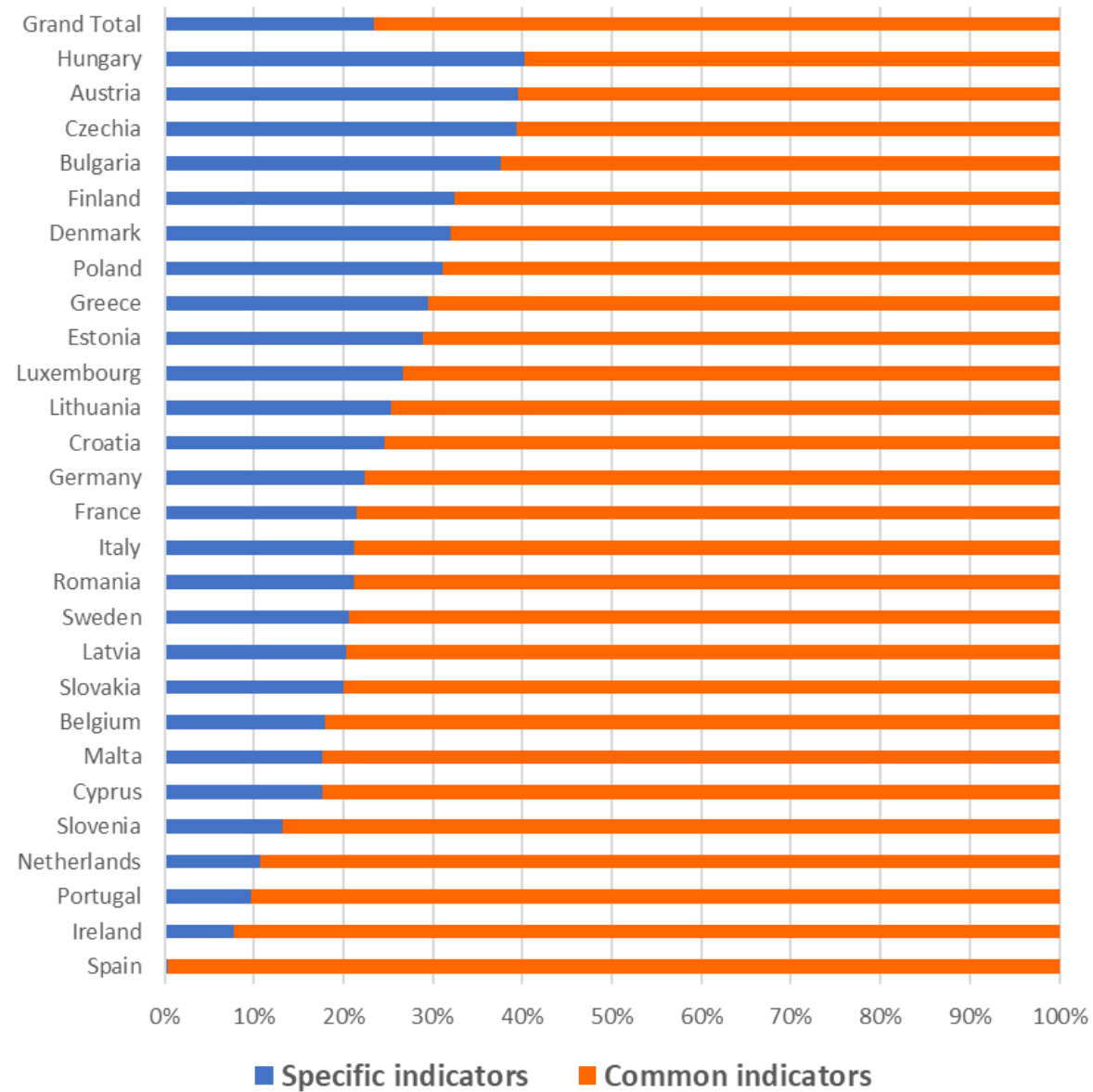
2021-2027 - Use of common indicators

ERDF (preliminary)	OUTPUT	RESULT	Grand Total
Specific	2,060	1,192	3,252
PO1 Smarter Europe	338	339	677
PO2 Greener Europe	579	360	939
PO3 Connected Europe	110	82	192
PO4 Social Europe	294	197	491
PO5 Europe closer to citizens	154	214	368
POTA Technical Assistance	585		585
Common	6,763	4,254	11,017
PO1 Smarter Europe	2,593	1,654	4,247
PO2 Greener Europe	2,472	1,731	4,203
PO3 Connected Europe	234	163	397
PO4 Social Europe	537	401	938
PO5 Europe closer to citizens	927	305	1,232
Grand Total	8,823	5,446	14,269

ERDF: Number of output Indicators 2021-2027 (preliminary)



ERDF: Number of output indicators 2021-2027 (Prelim.)



Assessing plausibility of baseline/milestone/targets

- As the bulk of programmes encoded target values, we were able to progressively get a broader picture of how common indicators are used in programmes / compare target values across MS / carry out plausibility checks
- Several new, common result indicators have been added in 21-27; Programmes were encouraged to provide estimates for baselines and targets, based on best estimates;
- Questions will arise whether indicator methodologies are applied coherently across the board; (=> cf Open Data presentation)
- We would appreciate MA's help in spotting and correcting outlier-values where possible.



Cohesion Open Data Platform: Expansion to 2021-2027 programming

Cohesion open data: what is it?

Since 2015 unique data on EU budget programmes based on the content of 1) adopted programmes and 2) monitoring of finances and achievements (common indicators).

3 levels available to explore:

- Website with curated visualisations by country / fund / theme
- Data stories: exploring the data in more detail with narrative and explanatory texts
- Open data: Download, visualise, build analysis with API formatted datasets

For DG REGIO ODP complements [Inforegio website](#) and [Kohesio project database](#)

Key changes

Evolution not revolution

- ~~ESIF~~ Cohesion Open Data Platform
- New navigation menu: 2014-2020 ↔ 2021-2027
- New navigation pages for 2021-2027 funds, countries with different look
- More shared management funds covered: JTF + DG Home Funds
- Planned extension to cover entirety of CAP plans (2023)
- New datasets with different data structure vs 2014-2020

Tour of the extended Cohesion ODP

- Home page
 - Data story: Overview of Partnership Agreements
- Fund pages with new Funds for 2021-2027 showing adopted programmes. EU funding volume will increase day by day until early 2023
- Cohesion policy: overview page + theme pages + country pages
- Data Stories: new filter by period

COHESION OPEN DATA PLATFORM

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Adoption of 2021-2027 Partnership Agreements



2021-2027 Cohesion policy initial EU budget allocations

Cohesion Open Data provides transparent data to EU taxpayers on the use of EU budget funds. See all the funds covered [here](#).

Open Data is free public data published by the European Commission. Explore using the header menu above.

 Search our Open Data catalogue

New to #CohesionOpenData?

[FAQ](#) - [Blog](#) - [User Guide](#)

[Cohesion Overview 2014-2020](#)

[INFOREGIO: policy website](#)

Already a data expert?

[Login](#) - [Data catalogue](#)

[Cohesion Overview 2021-2027](#)

[KOHESIO: project website](#)

Adoption of 2021-2027 Partnership Agreements



2021-2027: Adopted Partnership Agreements

1. Introduction

A Partnership Agreement is a strategic document where a Member State describes the **long-term strategy** of the use of the cohesion policy funds - the European Regional development Fund (ERDF), the European Social Fund Plus (ESF+), the Cohesion Fund (CF), the Just Transition Fund (JTF) - and the European Maritime and the Fisheries and Aquaculture Fund (EMFAF). The Partnership Agreement includes the objectives that the Member State intends to

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Funding Period 2021-2027

2021-2027 EU funds navigation page

Cohesion policy

 European Regional Development Fund	 European Social Fund Plus	 Cohesion Fund
 Just Transition Fund	 Interreg	

Other funds

 Asylum, Migration and Integration Fund	 Border Management and Visa Instrument	 Internal Security Fund
 European Maritime, Fisheries and Aquaculture Fund		

European Commission

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Funding Period: 2021-2027

2021-2027 Cohesion Policy overview

Under the cohesion policy "investment in jobs and growth" goal the ERDF, ESF and Cohesion Fund invest in the five cohesion policy high level "policy objectives" with an initial EU allocation of EUR 350 billion. In addition this overview includes the EU allocation of EUR 19 billion under the Just Transition Fund. The ERDF financing of Interreg in the EU27 under the "European territorial cooperation goal" is presented separately on the [Interreg page](#).

The initial EU allocations to the cohesion policy funds (before any transfer of resources) are set out in [this datastory](#). The charts below present information on investment plans and achievement targets from adopted programmes.

This platform also provides open data on other shared management funds: AMIF, BMVI, EMFAF and ISF. Explore those funds from the [Funds overview page](#).

The final planned cohesion policy investments will be available in early 2023 once all programmes are adopted.

#CohesionPolicy - #CohesionOpenData

Finances: Planned | Achievements

Total EU National

€129 010 061 622

The planned total financing, EU share or national co-financing can be visualised in the charts below using the filter buttons above. Based on the filter chosen the planned financing 2021-2027 is presented below 1) by major theme and 2) by country. (The source dataset is available on the link "Explore this data").

2021-2027: Cohesion Policy budget by Fund, EUR billion (daily update)

Explore this Data | Export Image | Share to twitter | Embed Chart

Fund	Percentage
ERDF	54.3%
ESF+	31.9%
CF	9.8%
JTF	3.9%

Finances planned charts

2021-2027: Cohesion Policy budget by Theme, EUR billion (daily update)

Explore this Data | Export Image | Share to twitter | Embed Chart

Theme	ERDF	ESF+	CF	JTF	Total
PO4 Social Europe	15.5	25.5	0	0	45.5
PO1 Smarter Europe	35.5	0	0	0	35.5
PO2 Greener Europe	10.5	10.0	0	0	20.5
PO3 Connected Europe	8.5	0	0	0	8.5
PO5 Europe closer to citizens	5.5	0	0	0	5.5
PO6 JTF specific objective	3.5	0	0	0	3.5

2021-2027: Cohesion Policy budget by Country, EUR billion (daily update)

Explore this Data | Export Image | Share to twitter | Embed Chart

Country	ERDF	ESF+	CF	JTF	Total
Germany	15.5	15.0	0	0	30.5
Czechia	10.5	15.0	0	0	25.5
Greece	10.5	10.0	0	0	20.5
Italy	10.5	5.0	0	0	15.5
Poland	10.5	0	0	0	10.5
Lithuania	8.5	0	0	0	8.5
France	5.5	0	0	0	5.5
Bulgaria	5.5	0	0	0	5.5
Finland	5.5	0	0	0	5.5
Sweden	5.5	0	0	0	5.5
Netherlands	5.5	0	0	0	5.5
Austria	5.5	0	0	0	5.5
Cyprus	5.5	0	0	0	5.5
Denmark	5.5	0	0	0	5.5

Finances planned: detailed

Cohesion policy uses a categorisation system to provide detailed thematic information on the finances planned. The detail captured is linked to the high level "policy objectives" and presented below in aggregated for the ERDF, ESF+, Cohesion Fund and JTF in an interactive sankey chart.

Click on the chart elements or use the drop down menus to filter by countries, funds, themes, etc. Users can also hold ctrl and click selection to select multiple elements. Press "reset selection" in case of non response.

2021-2027: Cohesion Policy Planned EU financing by detailed themes (categorisation)

Explore this Data | Export Image | Share to twitter | Embed Chart

Reset selection

Countries: Austria, Bulgaria, Cyprus, Czechia, Denmark

Funds: Cohesion Fund, European Regional Development Fund, European Social Fund Plus, Just Transition Fund


Policy Objectives: PO1 Smarter Europe, PO2 Greener Europe, PO3 Connected Europe, PO4 Social Europe, PO5 Europe closer to citizens

Specific Objectives: ES04.2 Improving education and training systems, ES04.6 Quality and inclusive education and training systems, ES04.7 Lifelong learning and career transitions, ES04.8 Active inclusion and employability, ES04.9 Integration of third country nationals

The sankey chart illustrates the flow of financing from countries and funds through policy objectives to specific objectives. The main flows are from the European Regional Development Fund and European Social Fund Plus to Policy Objectives PO1 Smarter Europe, PO2 Greener Europe, and PO3 Connected Europe. These then flow into various Specific Objectives such as RSO2.1 Sustainable TEN-T, RSO2.2 Sustainable transport, and RSO2.3 Smart energy systems.


Achievements charts





Fund: European Regional Development Fund
Theme: All

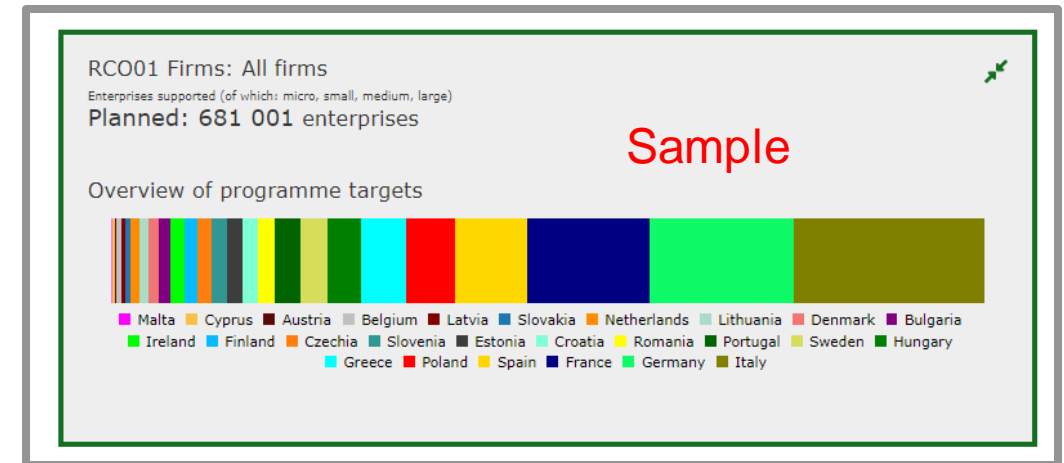
Filter by a different th... 

This page provides visualisations of the targets for selected common output indicator defined for the ERDF 2021-2027. These indicators can be filtered by major theme using the filter above. Clicking on an indicator tile provides a description of the indicator and visualisation of the targets showing the contribution by country. The visualisations of a more complete set of common outputs is available on the relevant high level theme pages.

The source dataset, available on the link "Explore this data", provides complete data on all common and specific output and result indicators agreed in adopted programmes.

Explore and Share this Data 

RCO01 Firms: All firms Planned: 681 001 enterprises 	RCO06 RTDI: Researchers with improved infrastructure Planned: 81 561 annual FTEs 
RCO14 Digital: Public institutions supported for Digital Planned: 196 919 public institutions 	RCO101 RTDI: SMEs investing in new skills Planned: 66 632 enterprises 



COHESION OPEN DATA PLATFORM

HOME OVERVIEW **THEMES** COUNTRIES FUNDS PROGRAMMES PROJECTS STORIES

Funding Period **2021-2027**

Explore the 2021-2027 high level policy objectives



P01 - Smarter Europe



P02 - Greener Europe



P03 - Connected Europe



P04 - Social Europe



P05 - Europe Closer to Citizens

Through the filters above you can explore the distribution of planned investment financing and expected achievements (targets) under the 5 policy objectives set under the cohesion policy "Investment in jobs and growth" objective.

The thematic investments under Interreg under the Territorial Co-operation objective are presented separately on the [Interreg page](#).

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Funding Period **2021-2027**

Explore 2021-2027 data by country

 Austria	 Belgium	 Bulgaria	 Cyprus
 Croatia	 Czechia	 Denmark	 Estonia
 Finland	 France	 Germany	 Greece
 Hungary	 Ireland	 Italy	 Latvia
 Lithuania	 Luxembourg	 Malta	 Netherlands
 Poland	 Portugal	 Romania	 Slovak Republic
 Slovenia	 Spain	 Sweden	

Major developments planned

End 2022

- Programme pages for 2021-2027 adopted programmes

First semester 2023

- Data on EU payments / financial tables of adopted programmes
- Publication of data from all adopted cohesion policy programmes
- New data stories on climate tracking, biodiversity, gender tracking and more
- Open Data on CAP strategic plans [July 2023]
- Link to funded projects on Kohesio (2014-2020, later 2021-2027)

Early 2024

- First data on implementation 2021-2027 programmes (tbc)

Reporting on Financial and indicator implementation (outline plans)

- SFC2021: Financial data 31/1 - 30/04 - 31/07 - 30/09 - 30/11
Indicator data: 31/1 – 31/7
- SFC2021 Reporting module open in December for 31/1/2023
- **Reporting of 31/1/2023:** REGIO will use first data reported to build and test extraction of data and comparison to planned values
- **Reporting of 31/7/2023:** REGIO will run plausability checks. In case of serious outlying values Managing Authorities will be asked to explain or correct
- **Reporting of 31/1/2024:** After plausability checks REGIO plans to publish first implementation data in Q1 2024

Useful resources

- [Website](#)
- [Blog](#)
- [FAQ](#)
- [User Guide to ODP](#)
- [User guide to visualisation](#)
- [Browse data stories](#)

Thank you!

Agenda – Friday, 16/12

- 09.30 - Update on EC ex post evaluation 2014-2020
- 10.15 - Presentation of DG REGIO modelling of EU funds impact
- 10:45 - Coffee break
- 11:30 - Evaluation activities and news from the Member States
- 12:00 - AOB



Ex post evaluation of 2014-20 ERDF and CF investments

State of play

State of play

- Final Staff Working Document will be completed by 2025
- Tendering/ contract launched for 11 work packages
- First 6 Inception reports have been received
- The bulk of the case studies will be carried out in 2023
- NB: you and MAs might be contacted for interviews and surveys linked to the exercise
- Terms of Reference of published WPs available [here](#)

WP 1: Synthesis



David ALBA

back-ups: Carlo AMATI, Caterina SCARPA



Timeline

- Start: 2022 May
- End: 2025 Final Synthesis report
- Contractors: Applica, Ismeri Europa, Quadrant Conseil, ICF, Cambridge Econometrics



Main activities so far

- Methodological advice & coordination;
- Review and synthesise deliverables;
- Report on macroeconomic situation and regional development trends & regional impact;
- Develop lessons learned into a distinct body of knowledge – “Cookbook”
- Synthesis report, country intelligence.

WP 2: Data preparation / monitoring systems



John WALSH
back-up: Philip ENGELS



Scope

- ERDF + CF funding
- All funding covered by programmes
- Contractors: CSIL Milano, Prognos, PPMI



Timeline

- Signature + Kick off: December 2020
- Stakeholder Seminar: 17 March 2022
- Final Synthesis report: Mid-2022



Main outputs – [Link](#) – [Public Data story](#)

- ✓ Single database of operations, beneficiaries, indicators
- ✓ Clustered operations into a typology
- ✓ Assessed data reliability
- ✓ Assessed monitoring systems and produced national factsheets

2014-2020 Data on operations - WP2 (public)



This story presents the vast amount of monitoring data from the national/regional monitoring systems on 2014-2020 ERDF-CF investments. The data has been collected to be further processed and used to inform the analysis...

Read more at <https://cohesiondata.ec.europa.eu/stories/s/2014-2020-Data-on-operations-WP2-publ>

WP 3: Effect of funding and context



Philippe MONFORT
back-up: Davide CECCANTI



Timeline

- In parallel to WP1 (2022 May – End 2025)
- Ongoing internal work in DG REGIO



Main activities

- Review of macroeconomic trends by thematic area
- Preliminary modelling (RHOMOLO) results on GDP and key variables
- Exploratory work on counterfactual (CR-SEQDD)

WP 4: RTDI



Irina CIOCIRLAN
back-up: Davide CECCANTI



Timeline

- Signature of contract expected in the beginning of 2023



Main Tasks

- Identification of the policy instruments and the associated theories of change
- 12 case studies (including 1 case study addressing financial instruments)
- Potentially a counterfactual analysis will be made
- 19 evaluation questions (including 4 policy specific ones)
- Country fiches and policy instruments fiches

WP 5: Information and communication technologies (ICT)



Arturo POLESE
+ Ninon BEILLARD



Timeline

- Activities started in August 2022.
- Contractors: CSES, CSIL Milano
- Tasks to be completed within 18 months
- Inception phase completed
- Seminar (with participants from national and regional authorities): Month 14



Main activities

- NB. Evaluation covering 2014-2020 AND 2007-2013
- 14 evaluation questions addressing the five Better Regulation evaluation criteria (Effectiveness, Efficiency, Relevance, Coherence, EU added-value)
- 5 policy-specific evaluation questions
- 10 case studies analysing the policy instruments being selected

WP 6: SME support



Lucian LUCA
back-up: John WALSH



Timeline

- Contract signed June 2022
- Contractors: CSIL Milano, Prognos
- Tasks to be completed within 18 months
- Seminar with national and regional authorities: September 2023 (tbc)



Main activities

- Inception report accepted
- Pilot case study ongoing: SME internationalisation in IT, PT & PL (top countries in terms of expenditure for this topic)
- Data collection for pilot is in progress

WP 7: European Green Deal



Agnieszka KRASICKA (as of 01/2023)
back-up: Giulia OLIVIERI



Timeline

- Signature of the contract: End of August 2022
- Contractors: COWI, CSIL Milano, Milieu Consulting, Prognos
- First draft of Inception Report: 06.10.22
- Inception Meeting: 20.10.22



Main activities so far

- Defined the TOC and review it with comments from the experts
- Finalization of the pilot case study design on wastewater treatment
- 12 policy instrument case studies and 3 horizontal ones

WP 8: Transport and energy network infrastructures



Ninon BEILLARD
back-up: Arturo POLESE



Timeline

- Contract signed in September 2022
- Contractors: KPMG Tanacsado, VVA Brussels
- Tasks to be completed within 18 months, starting from the signature of the contract
- Seminar (with participants from national and regional authorities) planned in October 2023



Main activities

- First Steering Committee (10/2022)
- Inception report accepted
- Development of draft Theory of Change
- 10 Case Studies planned
- Pilot case study ongoing: Support to building motorways along the TEN-T network

WP 9: Social



Philip ENGELS



Timeline

- TO8, 9, 10 - Employment, health and education
- Contract signed on 7 July 2022
- Contractors: VVA Brussels, Istituto per la Ricerca Sociale, Ramboll, T33
- Tasks to be completed within 18 months



Main Tasks

- ✓ Inception report submitted on 12 October 2022, Inception phase is coming to a close
- Pilot case on building the Theory of Change for 'infrastructure for early childhood education and care'
- first intermediate report due on 12 March 2023
- 19 evaluation questions, 10 case studies have been proposed

WP 10: Institutional capacity and reform



Carlo AMATI
back-up: Philip ENGELS



Timeline

- Call for tender open until 19 Dec
- Signature of 12-month contract expected in Q1 2023



Main Tasks

- Identification of relevant projects, policy instruments and associated theories of change
- 1 case study on reform and framework conditions
- 3 thematic case studies on selected policy instruments
- 14 evaluation questions on BR criteria + 6 policy specific ones
- Country fiches and policy instrument fiches



Particular attention in REGIO

WP 11: Interreg



Irina CIOCIRLAN
back-up: David ALBA



Timeline

- Contract signed in October 2022
- Contractors: Particip, M&E Factory, COWI



Main Tasks

- ✓ Inception report delivered end of November 2022
- First intermediate report expected in March 2023
- Overview of ETC programmes by strand and sub-strand (internal cross border, transnational, IPA, ENI, interregional)
- Clustering ETC programmes and developing theories of change
- Several case studies covering all strands and sub-strands
- 14 evaluation questions (including 4 policy specific ones)

WP 12: Crisis instruments



John WALSH
back-up: David ALBA



Timeline

- Tendering Q1/2022
- Contract start: Q2/2022 - first deliverable expected in Autumn 2023
- Final report expected in Q2 2024



Main Tasks

- Data collection
- To evaluate the effectiveness of the CRII/CRII+ measures
- To evaluate the effectiveness of REACT-EU resources added to ERDF programming 2014-2020

WP 13: Integrated territorial development - study



Caterina SCARPA
back-up: Carlo AMATI



Timeline

- Contract start: 11/2022, 18 months
- Contractors: EPRC Glasgow, PPMI, Austrian Institute of Economic Research, Delft University of Technology



Objectives

- Assess the rationale for the use of territorial instruments
- Analyse the evidence of effectiveness of the instruments
- Identify factors contributing to success/ failure under different conditions
- Study efficiency, coherence, relevance and EU added value
- Overview and typology of the instruments
- First deliverable expected in January 2023; final report expected in Q2 2024
- 5 case studies



Particular attention in REGIO



RHOMOLO impact assessment of the 2014-2020 cohesion policy in the EU regions

Motivations

- Analysis conducted for the 8th Cohesion Report.
- Impact of the 2014-2020 period on the EU-28 NUTS 2 regions.
- Data on policy interventions corresponds to the **allocations** after their mid-term revision of 2018.
- Simulations with a spatial general equilibrium model (RHOMOLO).

Motivations

- The same type of analysis will be conducted in the context of the 2014-2020 ex-post evaluation.
- Data on policy interventions corresponds to the **expenditure** up to end 2022.
- Impact on key macroeconomic variables (GDP, employment, investment, ...).

Models

- Assessing the macroeconomic impact of the policy is a real challenge.
- Why?
 - Short-run vs long run effects;
 - Direct and indirect effects (data on outcome of programmes only provide information on *some* of the direct effects);
 - Spill-over and externalities;
 - Coincidence with other economic developments.
- Models can address these issues in a consistent manner.
- DG REGIO has used economic models for a long time.

RHOMOLO

1. Cohesion policy is a development policy implemented at national **and** sub-national levels.

RHOMOLO is a spatial general equilibrium model producing results at the level of EU NUTS-2 regions

- Appropriate to analyse the impact of cohesion policy **at regional level**...
- ... in fields relevant for cohesion policy:
 - GDP;
 - Employment;
 - Factor productivity;
 - **Accessibility/remoteness.**

RHOMOLO

2. Cohesion policy is an investment policy which aims at improving the structure of EU MS and regions.

RHOMOLO includes engines of growth relevant to cohesion policy

- Investment in physical capital (support to SMEs);
- Investment in human capital (support to education, training, adapting skills to labour market demand);
- Investment in technology (support to R&D and innovation);
- Investment in public infrastructure **and in particular in transport infrastructure** (support to transport, other infrastructure).

RHOMOLO

3. EU regions are inter-related and policy intervention in one region also have impact in other regions.

RHOMOLO includes many features from economic geography

- Captures many spatial spill-overs:
 - Increase in activity in one region generates increase/decrease in activity in other regions (trade links);
 - Technological progress in one region also increases TFP in other regions (spatial diffusion of technology);
 - Activity and population may move to other regions in response to policy changes (agglomeration mechanisms).

Regional breakdown

In less developed Member States and regions, CP funding corresponds to a sizable policy injection.

Yearly average 2014-2023

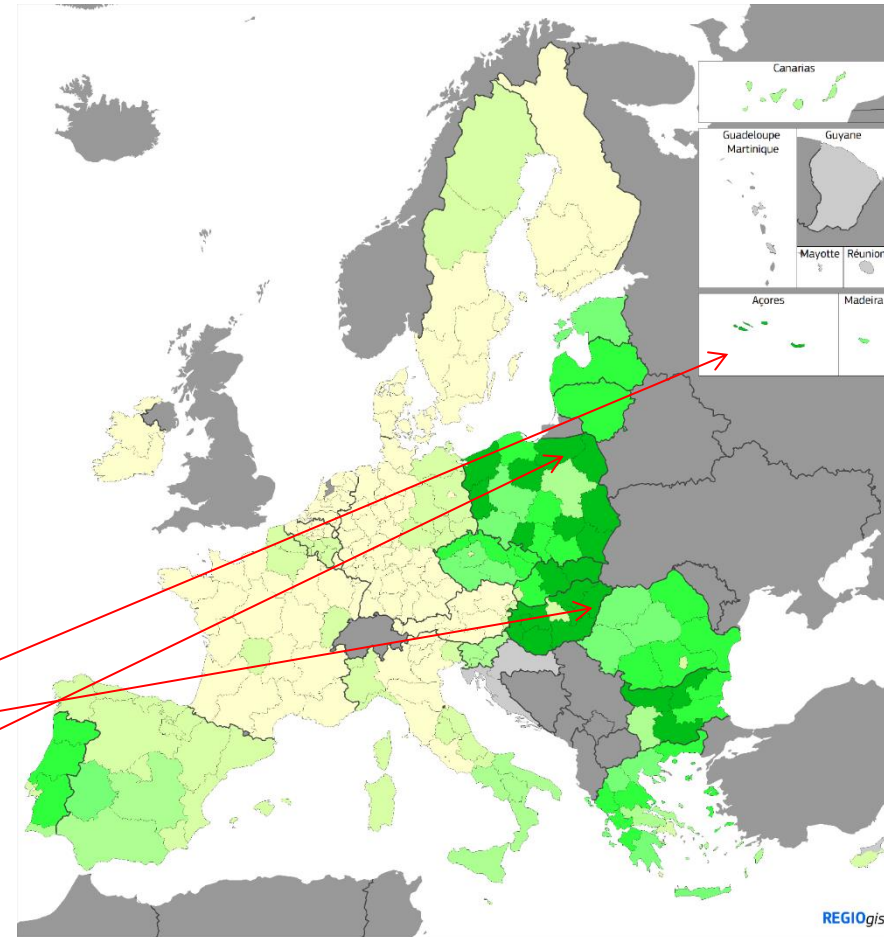
Croatia, Hungary: 1.7%

Latvia, Poland, Slovakia: 1.6%

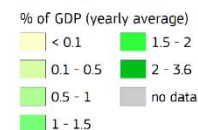
Região Autónoma dos Açores: 3.5%

Észak-Alföld: 3.5%

Warmińsko-Mazurskie: 3.1%



Cohesion policy allocation 2014-20



Source: DG REGIO

0 500 Km

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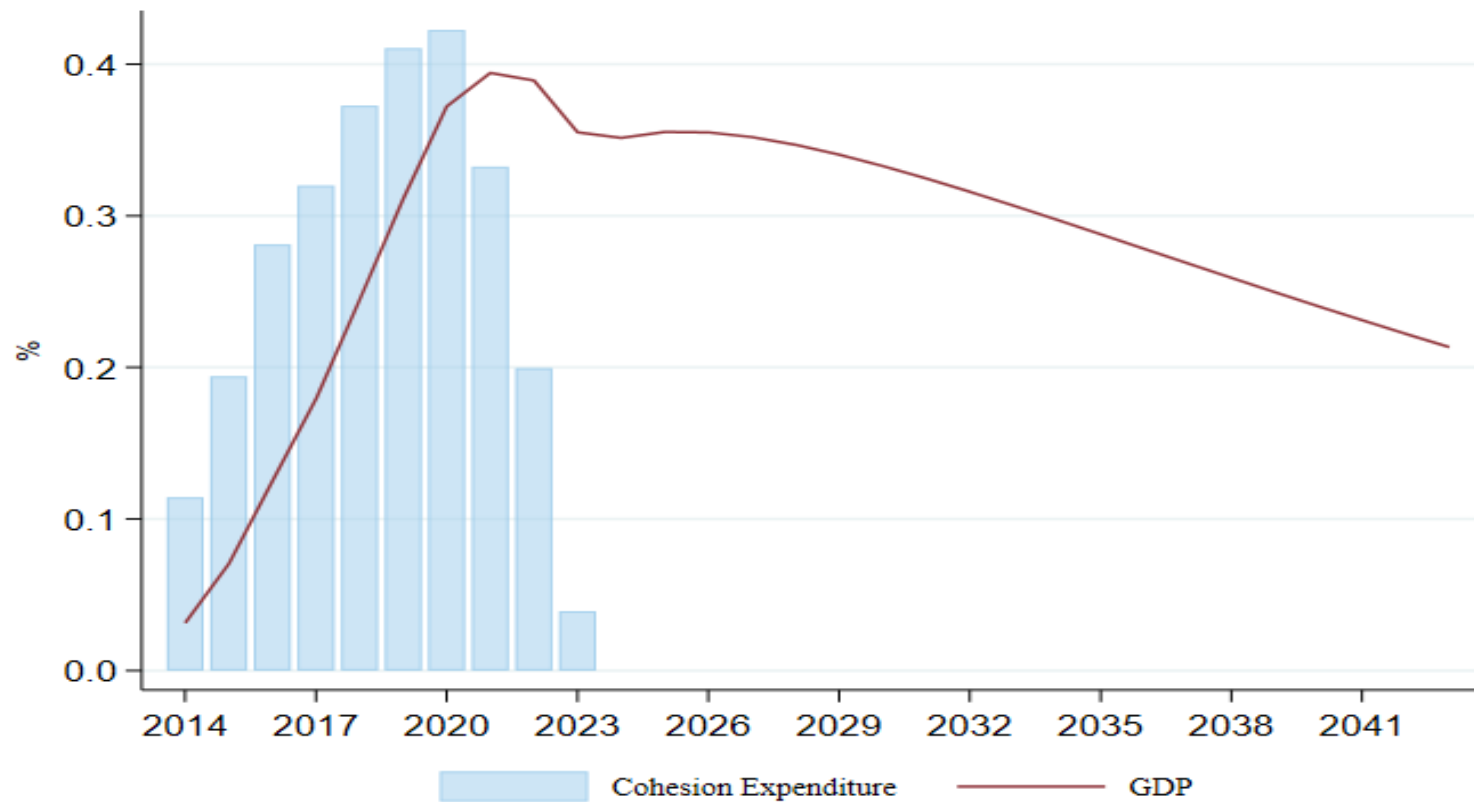
Sectoral breakdown

- The thematic concentration of funding changes from MS/regions to the other.

	TRNSP	INFR	RTD	HC	AIS	TA
Poland	35.8	26.8	14.1	15.8	4.2	3.3
Romania	29.6	32.7	4.8	20.9	8.7	3.3
Czechia	27.9	31.4	16.6	16.8	3.3	3.9
Latvia	27.8	33.1	14.7	15.5	6.5	2.4
Slovakia	27.2	32.4	9.8	18.8	7.8	4.1
Bulgaria	24.9	33.6	11.3	19.5	7.0	3.7
Hungary	17.6	33.4	10.4	22.2	15.0	1.6
Greece	16.9	30.0	7.8	26.0	15.7	3.6
Malta	16.6	45.6	9.1	18.8	7.0	2.8
Lithuania	15.4	42.9	17.1	18.5	3.0	3.1
Estonia	15.3	35.7	22.9	16.5	6.7	3.0
Croatia	15.1	37.6	9.1	18.1	16.0	4.0
Cyprus	14.8	36.1	9.1	24.0	12.8	3.2
Slovenia	12.2	32.5	23.7	23.3	4.3	4.0
Italy	10.1	24.7	12.4	34.0	15.4	3.3
Spain	9.6	30.5	16.1	31.1	10.9	1.9
Portugal	7.5	22.8	19.9	34.8	12.3	2.7
Sweden	5.7	10.2	31.6	39.8	8.4	4.3
United Kingdom	4.8	15.0	23.5	43.2	10.0	3.5
France	4.3	23.0	19.5	43.3	6.1	3.8
Luxembourg	4.2	9.0	9.8	74.6	0.1	2.3
Austria	4.2	16.0	26.3	34.0	15.2	4.4
Belgium	4.2	17.2	20.1	47.1	8.3	3.1
Germany	3.2	20.3	27.4	38.5	7.0	3.6
Finland	2.7	5.6	39.5	35.3	13.3	3.5
Denmark	2.3	6.2	41.2	45.0	0.5	4.7
Ireland	0.9	39.4	6.8	48.7	2.0	2.1
Netherlands	0.5	11.6	39.7	42.2	1.7	4.3
EU-27	19.8	28.3	14.7	25.1	8.9	3.2
EU-28	19.3	27.9	15.0	25.7	8.9	3.2

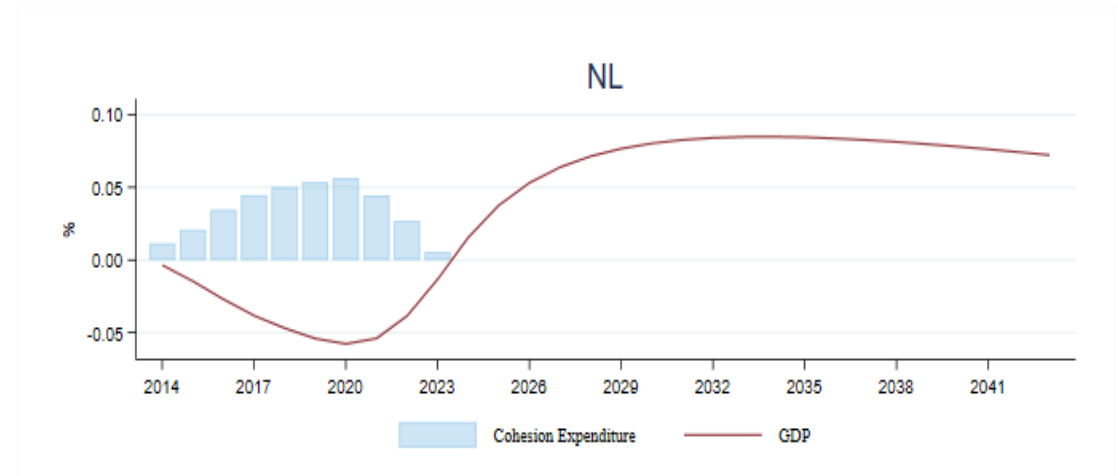
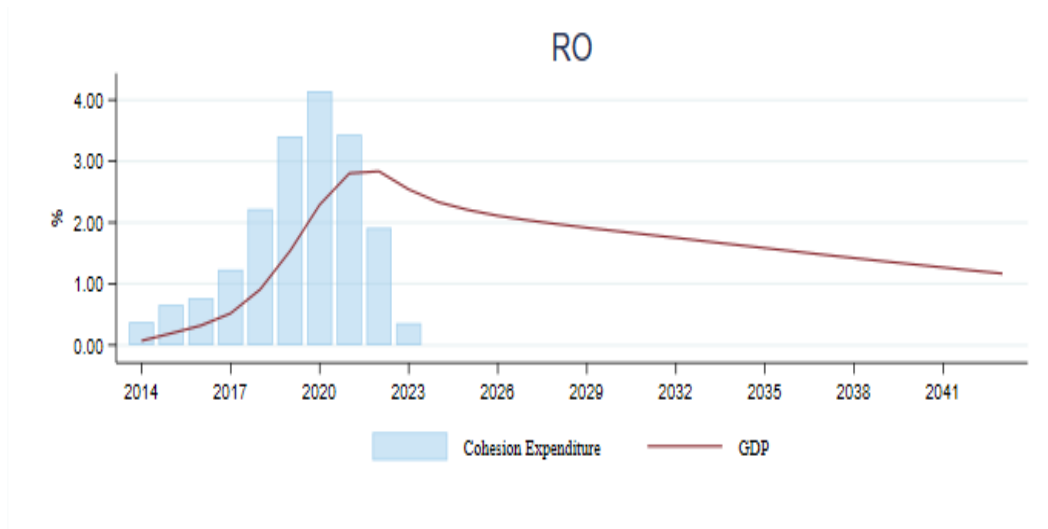
Impact at EU level

Cohesion policy expenditure (% of EU GDP) and impact on EU GDP (% deviation from baseline)



Impact at national level

Cohesion policy expenditure (% of national GDP) and impact on national GDP (% deviation from baseline)



Impact at NUTS 2 level

Impact is large in main beneficiaries.

Impact 2023

Croatia: +5%

Latvia: + 4%

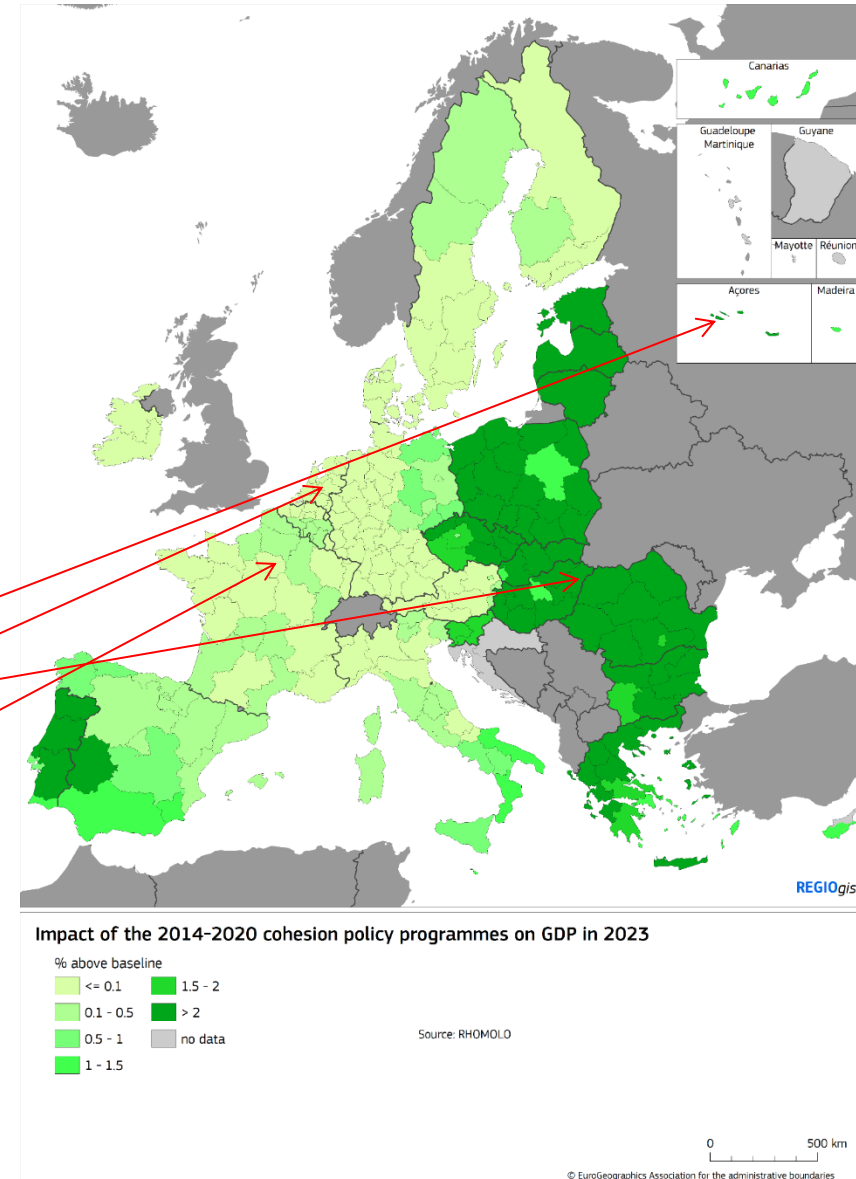
Lithuania: +3%

Região Autónoma dos Açores: +5%

Észak-Alföld: + 5%

Utrecht: - 0.04%

Île-de-France: -0.03%



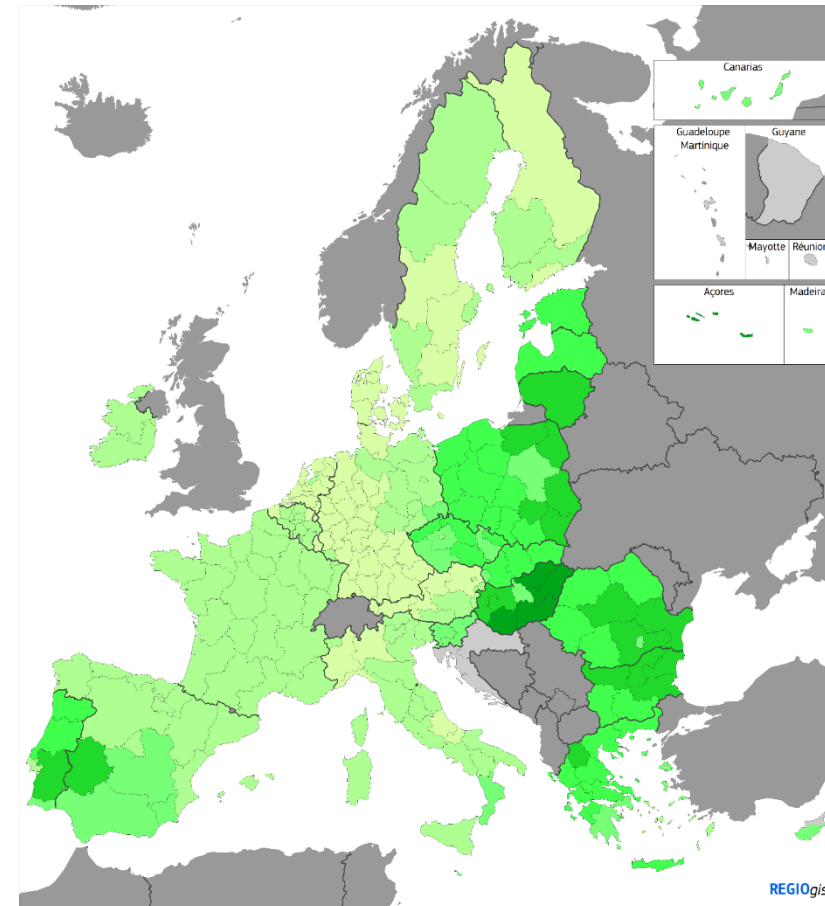
Impact at NUTS 2 level

But in the longer run, the impact is positive for all regions

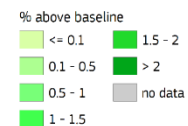
Impact 2043

Utrecht: + 0.07%

Île-de-France: + 0.1%



Impact of the 2014-2020 cohesion policy programmes on GDP in 2043



Source: RHOMOLO

0 500 km

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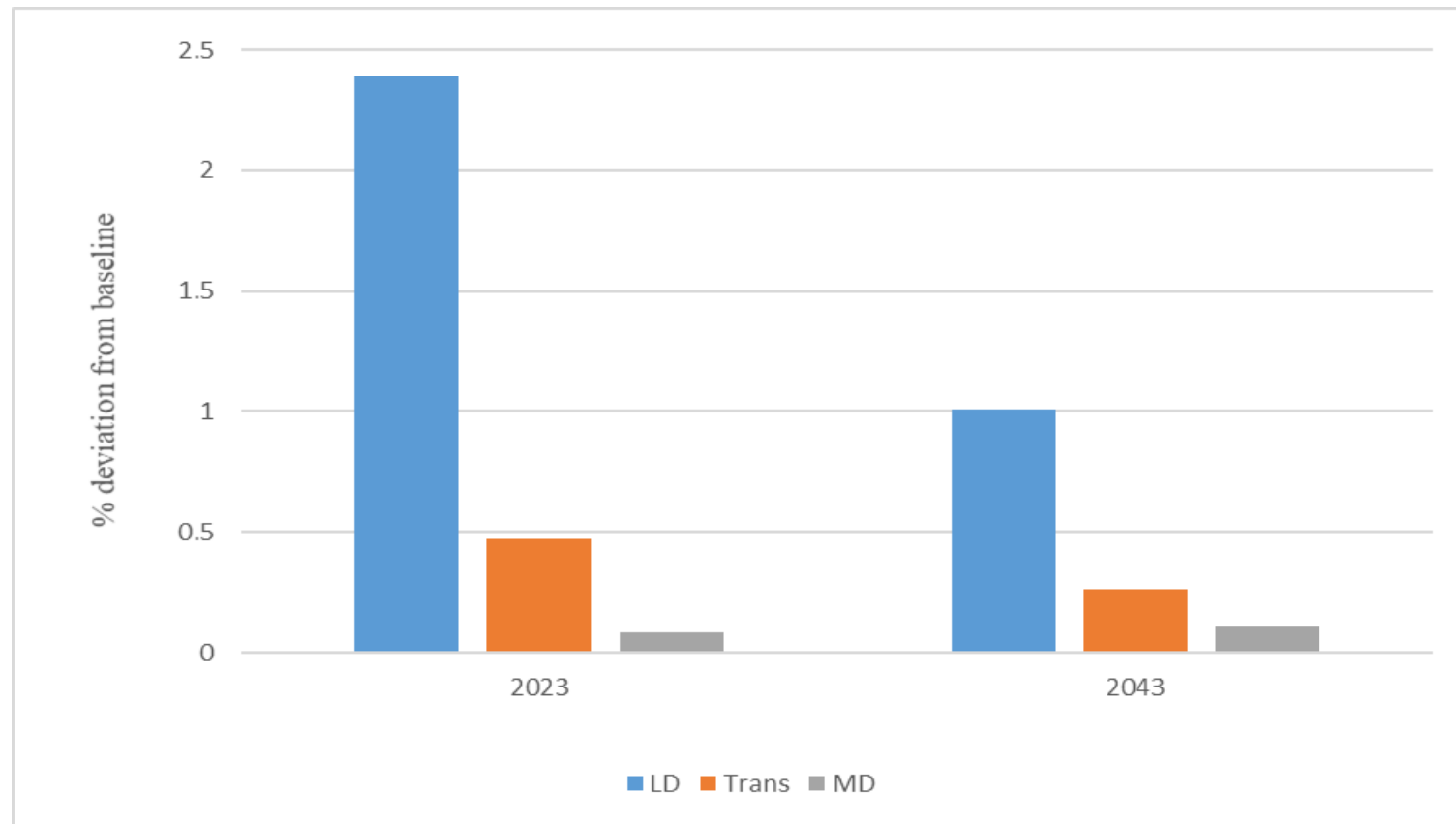
Multipliers

Multipliers – Impact per euro and average yearly rate of return

Multiplier	2023	2033	2043
LD	1.0	2.0	2.7
Trans	1.2	2.6	3.7
MD	0.5	2.5	4.2
EU 28	0.9	2.2	3.1
RR	-0.8%	4.0%	3.9%

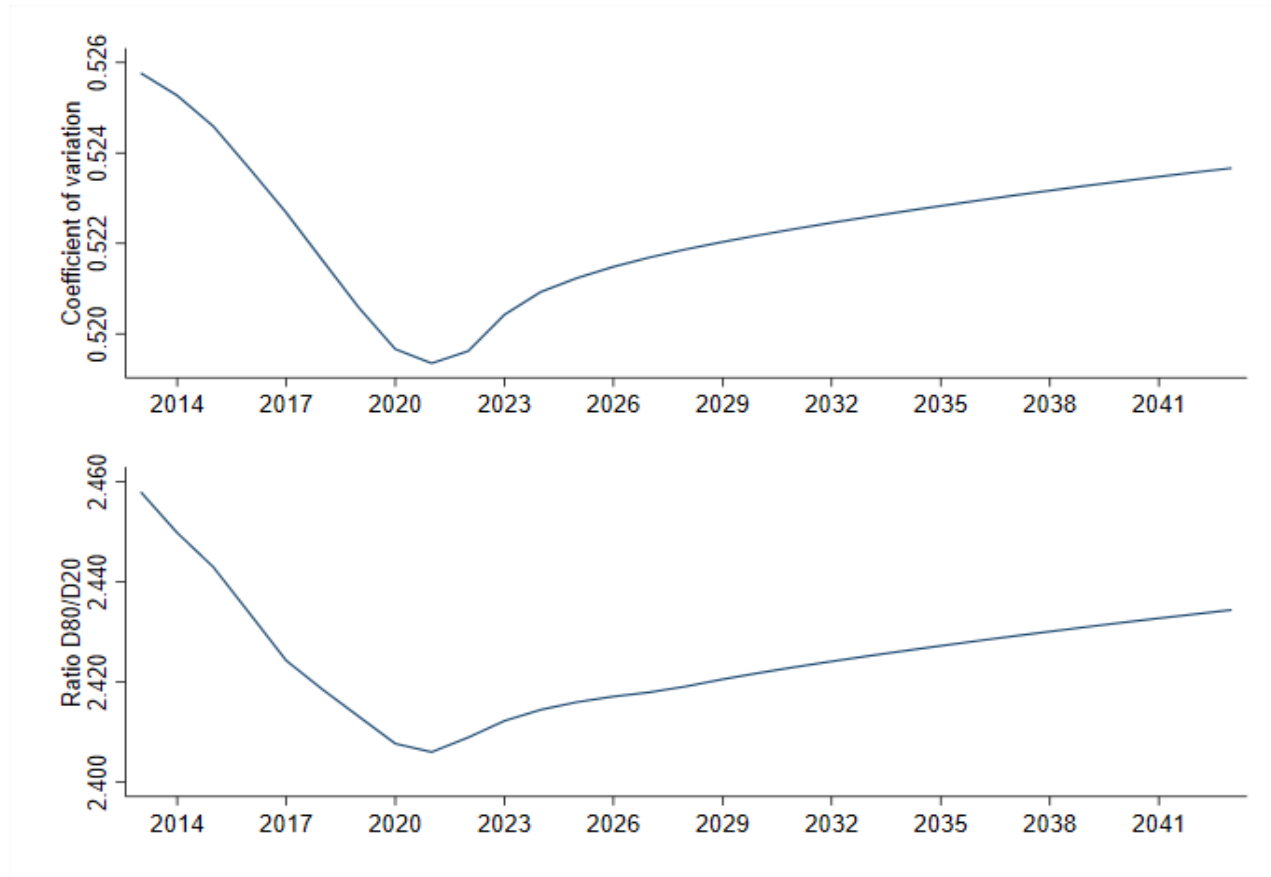
Categories of regions

Impact on GDP in less developed, transition and more developed regions



Impact on convergence

Impact on coefficient of variation and S80/20



Impact on convergence

Impact on Theil index

	Theil index in 2013	Change in 2021	Change in 2028	Change in 2033
Within	0.039	-1.99%	-1.25%	-0.99%
Between	0.114	-3.98%	-2.44%	-2.04%
Overall	0.153	-3.46%	-2.13%	-1.77%

Source: RHOMOLO simulations. Only countries with more than four NUTS 2 regions are reported to enable the calculations of the Theil index.

Conclusions

- *The results of the simulations suggest that cohesion policy interventions have positive effects on the EU economy.*
- *In the long run, the policy investments produce positive returns, with annual rate of return of about 4%.*
- *The GDP impact is substantially larger in the less developed regions of the EU that are the main target of the policy.*
- *However, in the long run all EU regions benefit from the policy*
- *The policy has contributed to decrease or limit the increase in regional disparities.*

Evaluation activities and news from the member states

- Tour de table
- 2021- 2027 Evaluation Plans (12 months after programme adoption)
- Upcoming events in the MS

AOB

- Programme Evaluation Report 2014-2022 Article 114 – Deadline 31/12/2022
- Public consultation on the ex post evaluation
- Evaluation Help Desk – methodological support and survey

Thank you!