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State aid Scoreboard 2023

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Executive Summary

In 2022, Member States have overall reduced their spending... - EU27 Member States spent EUR 227.98 billion, corresponding to 1.4% of their 2022 GDP, on State aid for both crisis and other measures. Overall, this corresponds to a reduction by 34.8%, from EUR 349.7 billion of expenditure in 2021. Despite being still at significant levels, ranging between 2.1% and 0.3% of national GDP, also spending dispersion across Member States consistently reduced if compared to 2021 when it ranged between 4.6% and 0.9% of national GDP.

...despite the introduction of measures to counterbalance the negative effects of the Russian invasion of Ukraine - Measures related to the Temporary Crisis Framework (TCF) amounted to EUR 39.33 billion at the EU level, around 17% of the total spending and 0.25% of the EU27 GDP. Overall, around 9.6% of all the aid approved was disbursed in 2022 in nominal amounts. Germany is the country that has provided the most TCF aid in absolute terms and compared to the 2022 GDP, with an amount of EUR 24.18 billion (approximately 0.62% of GDP), significantly higher than the TCF aid granted in the other Member States (for example, more than three times higher than Spain, the second highest spender in absolute numbers, that follows with EUR 7.29 billion (around 0.54% of the national GDP). The aid expenditure in Germany was spent mainly in the form of recapitalisations, justified by the systemic character of the energy supply companies, extending beyond the German wholesale energy markets.

The reduction is mainly driven by the phase-out of measures to mitigate the devastating economic effects of the COVID-19 pandemic... - Member States implemented COVID-19 measures worth EUR 76.65 billion, around 33.6% of the total State aid spending and 0.48% of the 2022 EU 27 GDP. This means that expenditure for COVID-19 measures was reduced by 60.5% compared to 2021, in which it amounted to EUR 194.17 billion. In the period between the adoption of the COVID-19 Temporary Framework (on 19 March 2020) and December 2022, Member States mobilised unprecedented levels of support under temporary COVID-19 measures to ensure that otherwise viable businesses hard hit by the pandemic crisis could keep afloat, and this support corresponded to around one third (34%) of all the aid approved in nominal amounts.

... but Member States have reduced their spending also for non-crisis objectives - In 2022, EU 27 Member States spent EUR 112 billion on State aid for non-crisis objectives. This corresponds to 0.7% of the EU-27 2022 GDP, covering around 49% of the total State aid spending. State aid expenditure for non-crisis objectives has strongly decreased since 2021, with a nominal decrease of around 23.4% (-EUR 34.21 billion), and the reduction is even more accentuated when adjusting for the effects of the inflation, in which case State aid expenditure for non-crisis objectives has decreased by -28% compared to 2021 (-EUR 43.53 billion). It appears that in 2022, due to the need to implement measures related to the impact of Russia's war of aggression against Ukraine and the remaining expenditure related to the COVID-19 crisis, Member States have decreased their spending on non-crisis-related objectives.

Outside crisis aid, environmental aid remains the main policy focus of Member States - Environmental protection and energy savings is by far the policy objective for which Member States have spent the most in 2022 (EUR 41.51 billion), albeit the value of spending was down 46% on 2021 in real terms. The second non-crisis policy objective is regional development (EUR 13.91 billion), which by contrast shows a +4.8% increase in 2022, followed by research and development including innovation (EUR 12.69 billion).

State aid to boost industrial innovation and global technological leadership - ambitious research, development, and innovation activities by industry which, due to the high risks involved, would not occur in the absence of public support, are facilitated by State aid rules, as well as investments to accelerate the achievement of the EU Green Deal objectives in a cost-effective way. Important Projects of Common European Interest (IPCEIs) enable Member States to pool financial resources, catalyse investments, and facilitate cross-border collaborations, addressing market failures in the process. The European Chips Act takes prominence in response to global semiconductor shortages. Furthermore, the Regional State Aid Guidelines (RAG), by addressing regional disparities and challenges, contribute to the cohesion objectives of the Union, ensuring a level playing field across Member States, but also provide increased possibilities for Member States

to support regions facing transition or structural challenges. In 2022 alone, the expenditure reported for IPCEI measures amounted to EUR 1.04 billion. Looking at selected RAG measures to support the batteries sector, the expenditure amounted EUR 261.58 million in 2022.

Direct grants are still the preferred State aid instrument - Direct grants was still by far the most popular aid instrument in 2022, representing 43% of total expenditure, despite an 18 percentage points decrease compared to the previous year, in which 61% of the expenditure was channelled through direct grants and direct grants/interest rate subsidies. Tax measures represent 20% of the total spending, and equity interventions grew quite significantly, being the only instrument of which the use grew both in absolute amounts and as a share of the total (15%). Guarantees represented 5% and loans at favourable terms 2%.

Co-financed projects - Compared to 2021, total spending on non-crisis co-financed projects was stable, from about EUR 15.51 billion in 2021 to about EUR 15.71 billion in 2022. This corresponds to a small 1.3% increase in nominal terms, which corresponds to a -5.2% decrease when adjusting for the inflation. Co-financed COVID-19 measures (EUR 463.37 million) represented a small part of the total co-financed projects which amounted to EUR 16.17 billion in 2022.

Pan-European Guarantee Fund - The Pan-European Guarantee Fund is a guarantee scheme managed by the European Investment Bank Group and jointly funded by 22 participating Member States. The PEGF's common budget is aimed at guaranteeing the issuance of debt instruments by eligible entities established in all EU participating Member States that were facing difficulties in accessing financing during the pandemic crisis. In 2022 the Pan-European Guarantee Fund issued guarantees to undertakings in all the participating Member States for total nominal value of EUR 23.3 billion.

Railways - The trend of subsidies to the rail sector shows a slight increase since 2016, with a steep increase in 2020 of +17.3% in nominal values, when the need to compensate providers of rail services for the damage suffered due to the COVID-19 outbreak and the ensuing containment measures was more acute. Total subsidies to the rail sector showed a significant drop in 2021 (-19.8% compared to the previous year), followed by an even more steep reduction in 2022 (-24.6%) that brought the total compensation and aid granted to the rail sector to EUR 35.06 billion, from EUR 46.48 billion in 2021. The decrease was observed in 2021 when containment measures on transport by rail were generally less tight and then in 2022, when those measures were entirely removed.

Aid to the financial sector - Since the outbreak of COVID-19, the war of aggression against Ukraine and the adoption by the Commission of the corresponding Temporary Frameworks for State aid measures, the Member States have targeted their State aid at undertakings that could not cover their liquidity needs due to the pandemic or due to economic effects of the war of aggression against Ukraine. The banking sector has indirectly benefitted from this support to the real economy, showing increased resilience so far. This is evident in the declining amounts of aid to the financial sector for 2020 to 2022 in comparison to the previous years.

Aid to agriculture and fisheries - In 2022, EU27 Member States have provided a total of EUR 7.72 billion for non-crisis State aid to agriculture, forestry, and rural areas, corresponding to 0.05% of total GDP. Member States' State aid expenditure in the fishery and aquaculture sector amounted to EUR 107.2 million in 2022, a 56% increase compared to the last year (EUR 68.64 million in 2021).

Wrapping-up the State Aid Modernisation (SAM) - the 2022 Scoreboard has assessed the implementation of SAM in practice, and its impact on State aid spending, with the following main findings:

- **The share of block-exempted measures keeps rising** - As observed in previous Scoreboards, Member States are increasingly using the General Block Exemption Regulation (GBER). Member States implemented 1 901 new GBER, 284 Agricultural Block Exemption Regulation (ABER) and 18 Fishery Block Exemption Regulation (FIBER) measures in 2022, corresponding altogether to 84% of the new State aid measures. Excluding the crisis measures, the **new GBER** measures account **93% of total new non-crisis measures**. Together with the general reduction in expenditure, the actual expenditure of GBER schemes also decreased in 2022 (-12%), although to a lesser extent.

In 2022, together with a reduction of around -41% in absolute amounts, also the relative share of notified aid reduced to around 73% of the aid expenditure.

- **Does DG COMP case practice focus on the potentially most distortive aid measures?** – Since 2014, the median expenditure for notified cases has increased from around EUR 2.2 million to EUR 3.4 million in 2019, with a jump in the COVID-19 crisis years to around EUR 5.3 million in 2020 and EUR 5.4 million in 2021,. In 2022, the median spending for notified schemes has decreased to EUR 4.2 million, still well above the 2019 level and the median value for GBER schemes, that was around EUR 0.8 million.

1 Introduction

Keeping competition effective in the EU is a prerequisite to the well-functioning of the Single Market. Competition in goods and services in the European Single Market provides companies with incentives to innovate, enter new markets and improve productivity, which in turn brings a greater variety of choice and lower prices for consumers. These forces also play a fundamental role in making European firms more competitive on the global stage.

State aid control is a key pillar to ensure fair competition and a level playing field across companies in the EU. State aid is an advantage in any form whatsoever conferred on a selective basis to undertakings by public authorities using State resources. A company that receives government support through State aid gains a competitive advantage over the other players in the market. Favouring some firms to the detriment of others might create inefficiencies by allowing less efficient companies to survive or even expand at the expense of the more efficient. This is why the Treaty on the Functioning of the EU (TFEU) generally prohibits State aid unless its positive effects outweigh the negative impact of distorted competition.

The TFEU leaves room for a number of exceptions to the general prohibition of State aid, for which support can be considered compatible. Specifically, in some circumstances, government interventions are necessary for the functioning and equitability of an economy, due, for example, to the presence of externalities or other market failures. State aid control therefore does not prevent Member State governments from supporting businesses. State aid control rather aims at ensuring that any detriment arising from distortions of competition is outweighed by the positive effects of the aid. It also ensures an efficient use of taxpayers' money while maximising available resources from limited national budgets which need to target many essential purposes, such as education, health, national security, or social protection. Moreover, by steering public aid towards objectives of common interest that otherwise would not be realised (e.g., R&D&I, major infrastructure projects, investment in renewable energy), State aid control helps ensure benefits for society and minimise distortions of competition.

The TFEU also explicitly states that aid "to remedy a serious disturbance in the economy of a Member State" may be considered compatible with the internal market¹. The sudden and wide-spread diffusion of the COVID-19 outbreak across Europe in March 2020 and the drastic containment measures taken by all Member States perfectly fitted this provision of the TFEU. On this basis, the Commission promptly put in place a **Temporary Framework** for State aid², after consultation of Member States. These temporary measures have enabled Member States to use the full flexibility under State aid rules to keep otherwise viable companies afloat through the various waves of the pandemic, while preserving the level playing field in the EU Single Market. Given the improved health and economic situation in the first months of 2022, the European Commission has decided not to prolong the State aid COVID Temporary Framework beyond 30 June 2022, with the exception of investment and solvency support measures, that were in place until 31 December 2023 given their importance to kick-start the economy and crowd-in private investment for a faster, greener and more digital recovery.

In 2022, the EU economy experienced another serious crisis caused by the aggression against Ukraine by Russia. On 23 March 2022, the Commission has adopted a **Temporary Crisis Framework³**, which recognises that the EU economy is experiencing another serious disturbance and provided Member States with a toolbox to help EU companies cope with problems such as

¹ Article 107(3)(b) TFEU.

² Communication from the Commission - Temporary framework for State aid measures to support the economy in the current COVID-19 outbreak (OJ C 91I, 20.3.2020, p. 1), as amended by Commission Communications C(2020) 2215 (OJ C 112I, 4.4.2020, p. 1), C(2020) 3156 (OJ C 164, 13.5.2020, p. 3), C(2020) 4509 (OJ C 218, 2.7.2020, p. 3), C(2020) 7127 (OJ C 340I, 13.10.2020, p. 1), C(2021) 564 (OJ C 34, 1.2.2021, p. 6), and C(2021) 8442 (OJ C 473, 24.11.2021, p. 1).

³ Communication from the Commission Temporary Crisis Framework for State Aid measures to support the economy following the aggression against Ukraine by Russia (OJ C 131I, 24.3.2022, p. 1–17).

disruptions in supply chains, blockage in the supply of energy and raw materials and the surge of energy prices. The Temporary Crisis Framework has been amended on the 20 July 2022⁴ and on 28 October 2022⁵. On 9 March 2023, taking into account the feedback received from Member States in the context of a survey and a targeted consultation, the Commission adopted a new **Temporary Crisis and Transition Framework**⁶, amending and prolonging in part the Temporary Crisis Framework, to foster support measures in sectors which are key for the transition to a net-zero economy in light of the Green Deal Industrial Plan. The Temporary Crisis and Transition Framework is designed taking into account cohesion objectives (with higher support possibilities for companies located in disadvantaged regions) and with safeguards to ensure that the aid does not trigger relocation of investments between Member States. On 20 November 2023⁷, the Commission decided to delay the phase-out of sections 2.1 (limited amounts of aid) and 2.4 (aid to compensate for high energy prices) by six months until 30 June 2024 in light of the persisting uncertainties in the energy market and to facilitate administrative implementation. The other sections in response to the immediate crisis (sections 2.2 to 2.3 on liquidity support and section 2.7 on reducing peak energy demand) were phased out on 31 December 2023. The transition rules in the TCTF allow Member States to accelerate investments in renewable energy production and storage (section 2.5) as well as industrial decarbonisation (section 2.6). In addition, besides the normal State aid rules, e.g. on regional aid, environmental and energy aid or support for research and innovation, the Commission has temporarily provided additional flexibility for such support in section 2.8 of the TCTF, which covers productive investments in certain essential clean technologies (batteries, solar panels, wind turbines, heat-pumps, electrolysers and carbon capture usage and storage) as well as their key components and critical raw materials. The sections of the TCTF intended to support the transition to a net-zero economy (sections 2.5, 2.6 and 2.8) are applicable until 31 December 2025.

The present State Aid Scoreboard is based on State aid expenditure made by Member States in 2022 and provides updates of State aid expenditure in the previous years.

1.1 What is the State aid Scoreboard?

Context – Under Article 6 of Commission Regulation (EC) 794/2004⁸, the European Commission must publish, annually, a State aid synopsis (“State aid Scoreboard” or “Scoreboard”) based on the expenditure reports provided by Member States.

Objective – The Scoreboard is the European Commission’s benchmarking instrument for State aid. It was launched by the Commission in July 2001 to provide a transparent and publicly accessible source of information on the overall State aid situation in the Member States and on the Commission's State aid control activities. Furthermore, the data in the report are used for further statistical analysis and represent an important source of information. Scoreboard data are also used by Member States and external stakeholders.

Apart from providing the aggregated information on State aid expenditure at the EU and national levels, the Scoreboard is a key component of the State aid monitoring toolbox for tracking and

⁴ Communication from the Commission Amendment to the Temporary Crisis Framework for State Aid measures to support the economy following the aggression against Ukraine by Russia 2022/C 280/01, C/2022/5342 (OJ C 280, 21.7.2022, p. 1–13)

⁵ Communication from the Commission Temporary Crisis Framework for State Aid measures to support the economy following the aggression against Ukraine by Russia 2022/C 426/01, C/2022/7945 (OJ C 426, 9.11.2022, p. 1–34)

⁶ Communication from the Commission Temporary Crisis and Transition Framework for State Aid measures to support the economy following the aggression against Ukraine by Russia 2023/C 101/03, C/2023/1711 (OJ C 101, 17.3.2023, p. 3–46)

⁷ Communication from the Commission – Amendment to the Temporary Crisis and Transition Framework for State Aid measures to support the economy following the aggression against Ukraine by Russia C/2023/8045 (OJ C, C/2023/1188, 21.11.2023)

⁸ Commission Regulation (EC) No 794/2004 of 21 April 2004 implementing Council Regulation (EC) No 659/1999 laying down detailed rules for the application of Article 93 of the EC Treaty (OJ L 140, 30.4.2004, p. 1–134)

assessing the effects of the main past and ongoing policy developments in the State aid field. It gives the reader complementary information on the impact of recent developments in State aid policies and additional opportunities for analysis. It also highlights the role of State aid control in steering public aid towards objectives of common interest.

Focus points – This 2023 edition⁹ includes six special focus points on:

- 1) State aid expenditure provided in the context of the COVID-19 crisis.
- 2) State aid measures supporting the economy in mitigating the impact of Russia's war of aggression against Ukraine.
- 3) Block-exempted State aid expenditure.
- 4) State aid for energy and environmental protection.
- 5) State aid to deploy broadband networks.
- 6) State aid to boost industrial innovation and global technological leadership.

Open data – The Scoreboard is supplemented by further information. The Annexes provide additional material (illustrative tables and charts) to allow a more informed reading of the 2023 Scoreboard results. **State aid expenditure data gathered by DG Competition is also available on its data repository webpage on the Competition website**¹⁰.

1.2 Methodology

Scope – The Scoreboard contains primarily information about Member States' expenditure for all existing State aid measures in favour of industries and services (including agriculture, fisheries and aquaculture), for which the Commission has either adopted a formal decision or received a summary information sheet from the Member States for measures qualifying for exemption under the General Block Exemption Regulation (GBER)¹¹ or sectoral block exemptions (ABER¹² and FIBER¹³).

Cases which are still under examination are excluded. General measures that do not favour certain enterprises or sectors, and public subsidies that do not affect trade or distort competition, are not covered by the Scoreboard as they are not subject to the Commission's investigative powers under the State aid rules or deemed not to constitute State aid¹⁴. Therefore, the data presented in the Scoreboard do not include funding granted under the *de minimis* rules¹⁵.

⁹ Based on State aid expenditure made by Member States in 2023.

¹⁰ https://webgate.ec.europa.eu/comp/redisstat/databrowser/explore/all/all_themes

¹¹ Commission Regulation (EU) No 651/2014 of 17 June 2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty Text with EEA relevance (OJ L 187, 26.6.2014, p. 1–78)

¹² Commission Regulation (EU) 2022/2472 of 14 December 2022 declaring certain categories of aid in the agricultural and forestry sectors and in rural areas compatible with the internal market in application of Articles 107 and 108 of the Treaty on the Functioning of the European Union (OJ L 327, 21.12.2022, p. 1–81)

¹³ Commission Regulation (EU) 2022/2473 of 14 December 2022 declaring certain categories of aid to undertakings active in the production, processing and marketing of fishery and aquaculture products compatible with the internal market in application of Articles 107 and 108 of the Treaty on the Functioning of the European Union (OJ L 327, 21.12.2022, p. 82–139)

¹⁴ Subsidies granted to individuals or general measures open to all enterprises are not covered by this definition since they do not constitute State aid.

¹⁵ Commission Regulation (EC) N.1407/2013 (18.12.2013), Commission Regulation (EU) No 1408/2013 of 18 December 2013 on the application of Articles 107 and 108 of the Treaty on the Functioning of the European Union to *de minimis* aid in the agriculture sector (OJ L 352, 24.12.2013, p. 9–17) and Commission Regulation (EU) No 717/2014 of 27 June 2014 on the application of Articles 107 and 108 of the Treaty on the Functioning of the European Union to *de minimis* aid in the fishery and aquaculture sector (OJ L 190, 28.6.2014, p. 45–54)

Furthermore, State aid expenditure data presented in the Scoreboard excludes most of the aid to railways¹⁶, services of general economic interest¹⁷ and schemes approved under the Temporary Union Framework¹⁸, for which the corresponding legal bases impose limited reporting obligations on Member States. Aid to railways and crisis aid to the financial sector are covered separately in Sections 5.6 and 5.7.

Data and methodology – This State Aid Scoreboard comprises aid expenditure made by Member States from 01.01.2012 to 31.12.2022 which falls under the scope of Article 107(1) TFEU. State aid data on the repository webpage includes longer time series, from 1.01.2000 to 31.12.2022. The data is based on the annual reporting by Member States pursuant to Article 6(1) of Commission Regulation (EC) 794/2004. **The accuracy of the data remains the responsibility of Member States.**

The actual data on State aid expenditure concerning previous years may differ from data previously published for the same year. Indeed, Member States may have revised provisional figures or estimates from previous years by final actual expenditure, in particular, as regards to expenditure in tax schemes.

As of 1 January 2021, the United Kingdom has to report to the Commission expenditure under measures affecting trade between Northern Ireland and the EU¹⁹, and schemes where EU funds are involved.²⁰ Only these measures are therefore included in the scope of the present State aid Scoreboard for 2021 expenditure year and are presented separately in a dedicated section on the United Kingdom. All aggregate statistics are disclosed at the EU27 level.

State aid expenditures in constant prices have been calculated to adjust for the effects of inflation. Constant series have been calculated in constant 2021 prices by using the GDP price deflator²¹.

Unless differently specified, State aid expenditures are presented in terms of **aid element** granted by the Member State to the recipient of the aid. The aid element does not represent the nominal amount granted by the public authority, but measures the economic advantage passed on to the undertaking. For COVID-19 related measures, State aid expenditures are presented both in terms of nominal amount and in terms of aid element. The unit of measure is specified in the figures.

More detail on the methodology used in the State aid Scoreboard is provided in Section 11.

¹⁶ Subsidies to railways are excluded from the total State aid figures as they may fall under Article 93 TFEU and corresponding regulations. They however appear in a dedicated table in the Scoreboard, together with data falling under Regulation (EU) 2016/2338 of the European Parliament and of the Council of 14 December 2016 amending Regulation (EC) No 1370/2007 concerning the opening of the market for domestic passenger transport services by rail (OJ L 354, 23.12.2016), which are reported on a voluntary basis by Member States.

¹⁷ SGEI package: European Union framework for State aid in the form of public service compensation (OJ C 8, 11.1.2012); Commission Decision of 20 December on the application of Article 106(2) of the Treaty on the Functioning of the European Union to State aid in the form of public service compensation granted to certain undertakings entrusted with the operation of services of general economic interest (OJ L7, 11.01.2012, p. 3-10).

¹⁸ Communication of the Commission — Temporary Union framework for State aid measures to support access to finance in the current financial and economic crisis (Official Journal C6, 11.1.2011).

¹⁹ See Article 10 and Annex 5 of Protocol (No 15) On Certain Provisions Relating To The United Kingdom Of Great Britain And Northern Ireland (OJ C 202, 7.6.2016, p. 284–286).

²⁰ See Article 138 of Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community (OJ C 384I, 12.11.2019, p. 1–177).

²¹ Source AMECO online. Series GDP price deflator (PVGDD), 2022 Autumn forecast

2 Recent developments in State aid policy

The ongoing revision of State aid rules – The State aid Modernisation (SAM) is a major reform package implemented by the Commission in 2014 and aimed at simplifying and modernizing the State aid rules. In 2019 the Commission launched an evaluation of the SAM rules as required by the Commission's Better Regulation requirements. This evaluation took the form of a "fitness check" aimed at assessing whether State aid rules were still fit for purpose, taking into account the general SAM objectives, the specific objectives of the legal framework, the current and (already known) future challenges and whether the objectives of SAM have been met. The evaluation showed that, overall, the State aid control system and rules are fit for purpose. However, it also showed that individual rules needed some adaptation, also in the light of the European Green Deal and the EU's Industrial and Digital Strategies, as well as further streamlining.

In line with the new green and digital transformation ("twin transition") political priority, and taking into account the results of the Fitness Check, the Commission accelerated the revision of a first package of State aid rules. The already adopted revised rules include the following:

- **Guidelines on State aid for climate, environmental protection and energy (CEEAG)**²²: the new CEEAG (i) broaden the categories of investments and technologies that Member States can support to cover new areas and all technologies that can deliver the Green Deal, (ii) increase flexibility and streamline the existing rules, (iii) introduce safeguards (such as a public consultation requirement above certain thresholds), (iv) ensure coherence with the relevant EU legislation and policies in the environmental and energy fields, among others by phasing out subsidies for fossil fuels.
- **Guidelines on State aid to promote risk finance investments (Risk Finance Guidelines)**²³: the revised Risk Finance Guidelines, in particular, (i) limit the requirement to provide a funding gap analysis to the largest risk finance schemes and further clarify the evidence needed to justify the aid, (ii) introduce simplified requirements for the assessment of schemes targeting exclusively start-ups and SMEs that have not yet made their first commercial sale, (iii) align certain definitions included in the Guidelines with those included in the GBER to ensure consistency.
- **Communication on Important projects of common European interest (IPCEI Communication)**²⁴: the revised IPCEI Communication includes a number of targeted adjustments, such as (i) further enhancement of the European and open character of IPCEIs, by providing that IPCEIs must ordinarily involve at least four Member States and by requiring that IPCEIs are designed in a transparent and inclusive manner, (ii) enhancement of the benefits of the participation of SMEs in IPCEIs, (iii) alignment of the relevant rules to the current EU priorities (e.g. Member States are required to provide evidence of compliance of the notified projects with the 'do no significant harm' principle).
- **Short-term export-credit insurance Communication (STEC Communication)**²⁵: as part of the State aid Fitness Check, the results of the evaluation of the 2012 STEC Communication showed that, in principle, the rules work well and that they require only minor adjustments to reflect market developments and to be aligned to the SAM. For

²² Communication from the Commission – Guidelines on State aid for climate, environmental protection and energy 2022 C/2022/481 OJ C 80, 18.2.2022, p. 1–89

²³ Communication from the Commission – Guidelines on State aid to promote risk finance investments C/2021/8712 OJ C 508, 16.12.2021, p. 1–36

²⁴ Communication from the Commission Criteria for the analysis of the compatibility with the internal market of State aid to promote the execution of important projects of common European interest 2021/C 528/02 C/2021/8481 OJ C 528, 30.12.2021, p. 10–18

²⁵ Adopted on 6 December 2021

example, the Communication modifies the eligibility criteria for small and medium-sized enterprises (SMEs) which, in certain circumstances, may benefit from State insurance.

- **EU guidelines on regional State aid (Regional Aid Guidelines)²⁶**: key elements of the revised Guidelines are: (i) increased overall regional aid coverage to 48% of the EU population (previously 47%) and updated list of assisted 'a'-areas and predefined 'c'-areas based on the latest available Eurostat statistics on GDP (2016-2018) and unemployment (2017-2019), (ii) increased maximum aid intensities to support the European Green Deal and Digital Strategy objectives by enabling additional incentives for investments in the disadvantaged areas of the EU, (iii) validity of regional aid maps for the period 2022-2027, with a mid-term review envisaged for 2023 based on updated statistics reflecting the recent economic developments and enabling regions to bounce back from the crisis, (iv) a general simplification of the structure of the Guideline. At the same time, the Regional Aid Guidelines maintain strong safeguards to prevent Member States from using public money to trigger the relocation of jobs from one EU Member State to another, which is essential for fair competition in the Single Market.
- **Communication on the Framework for state aid for research, development and innovation (R&D&I Framework)²⁷**: the revised RDI Framework sets out the rules under which Member States can grant State aid to companies for RDI activities, while ensuring a level playing field. The revised RDI Framework includes a number of targeted adjustments (i) to simplify and reflect the experience gained from the application of the 2014 RDI Framework, (ii) to reflect regulatory, economic and technological developments, and (iii) to align the relevant rules to the current EU policy priorities, such as the European Green Deal and the Industrial and Digital Strategies. In particular, the targeted amendments update the existing definitions of research and innovation activities eligible for support under the RDI Framework, enable public support for testing and experimentation infrastructures required to develop, test and upscale technologies and simplify certain rules in order to facilitate the practical application of the RDI Framework and to alleviate possible excessive administrative burden for companies and public authorities. At the same time, the 2022 RDI Framework maintains safeguards to ensure that aid is limited to what is necessary and does not lead to undue distortions of competition.
- **Guidelines on State aid for broadband networks (2023 Broadband Guidelines)²⁸**: The revised Broadband Guidelines set out the rules under which the Commission will assess State aid measures notified by Member States to support the deployment and take-up of broadband networks in the EU. The new rules contribute to the EU's strategic objectives of ensuring gigabit connectivity for everyone and 5G coverage everywhere by the end of the decade, which is essential to achieve the digital transition of the Union. In particular, the revised Broadband Guidelines (i) align the threshold for public support to fixed networks with the latest technological and market developments; (ii) introduce a new assessment framework for the deployment of mobile (including 5G) networks; (iii) explain how public support can be used to incentivise the take-up of broadband services, by addressing barriers of digital connectivity and increasing access to broadband services, take-up measures aimed at promoting digital inclusion and societal resilience; (iv) simplify certain rules in order to facilitate the practical application of the Guidelines and to cut red tape for companies and public authorities; (v) clarify and provide further guidance on certain key concepts, which are important for the State aid assessment carried out by the Commission, such as mapping, public consultations, selection procedure, wholesale access pricing, and claw back mechanisms; and (vi) update the criteria used for balancing the positive impact of the aid against its negative effects on competition and trade. The assessment will take account of different possible effects, such as the contribution to the EU's digital and green transition objectives.

²⁶ Communication from the Commission Guidelines on regional State aid 2021/C 153/01 C/2021/2594 OJ C 153, 29.4.2021, p. 1-46

²⁷ Communication from the Commission Framework for State aid for research and development and innovation (2022/C 414/01) OJ C 414/1, 28.10.2022

²⁸ Communication From The Commission Guidelines on State aid for broadband networks 2023/C 36/01 C/2022/9343 OJ C 36, 31.1.2023, p. 1-42

- **Agricultural Block Exemption Regulation (ABER)²⁹ and Fishery Block Exemption Regulation (FIBER)³⁰: the ABER and FIBER** declare specific categories of aid compatible with EU State aid rules and exempt them from the requirement of prior notification to and approval by the Commission, provided that they fulfil certain conditions. This enables Member States to quickly provide aid, where conditions limiting the distortion of competition in the Single Market are met. The rules laid down in the ABER and the FIBER are complementary to those set out in the Guidelines applicable to the agricultural, forestry and fishery sectors, which set the conditions under which the Commission assesses whether State aid measures that are not block-exempted are compatible with the Single Market. The main changes to the ABER and the FIBER include a significant extension of scope of block exempted measures. In particular: (i) new categories of block-exempted measures, such as aid to prevent or compensate damage caused by protected animals, aid in favour of environmental management commitments and aid for cooperation in the agricultural and forestry sectors or aid to prevent or repair damage caused by adverse climatic events in the fishery and aquaculture sector; (ii) tailor-made block-exempted measures for Community-led Local Development projects aimed at promoting the development of rural areas on a local scale; (iii) a new ceiling for European Innovation Partnership Operational Group projects aimed at innovations in the farming sector and in rural areas. Projects below EUR 500 000 or up to EUR 2 million per company are now block-exempted. Based on the experience gained by the Commission, the new rules block-exempt up to 50% of cases which before were subject to notification.
- **The EU Guidelines for State aid to the agricultural and forestry sectors and in rural areas³¹ (Agricultural Guidelines), and the Guidelines for State aid in the fishery and aquaculture sector³² (Fisheries Guidelines):** the revised Agricultural Guidelines and the revised Fisheries Guidelines reflect recent Commission's case experience as well as the current EU strategic priorities, in particular the Common Agricultural Policy ('CAP'), the European Maritime, Fisheries and Aquaculture Fund ('EMFAF') and the European Green Deal, as well as the Farm to Fork Strategy and the Biodiversity Strategy. The revised Agricultural Guidelines introduce the following main changes: (i) a new, simplified procedure for the authorisation of State aid for measures co-financed under the CAP; (ii) an enlarged scope of measures targeting animal diseases and plant pests, allowing for aid to be granted for emerging animal diseases and certain invasive alien species; (iii) New incentives for farmers to commit to schemes under which they respect stricter environmental standards than what is required by law. The revised Fisheries Guidelines introduce the following main changes: (i) broader scope of measures targeting animal diseases in aquaculture, allowing for aid to be granted for emerging animal diseases and certain invasive alien species; (ii) introduction of new categories of aid, such as aid for fleet and cessation measures (in line with the EMFAF) and aid for investments in equipment that contributes to safety of fishing vessels in the Union's outermost regions. At the same time, it should be noted that capacity enhancement measures are unlikely to be approved.
- In addition to the above-mentioned guidelines, parts of the **General Block Exemption Regulation (GBER)³³**, which allows for direct implementation of State aid projects by

²⁹ Commission Regulation (EU) 2022/2472 of 14 December 2022 declaring certain categories of aid in the agricultural and forestry sectors and in rural areas compatible with the internal market in application of Articles 107 and 108 of the Treaty on the Functioning of the European Union, C/2022/9131 OJ L 327, 21.12.2022

³⁰ Commission Regulation (EU) 2022/2473 of 14 December 2022 declaring certain categories of aid to undertakings active in the production, processing and marketing of fishery and aquaculture products compatible with the internal market in application of Articles 107 and 108 of the Treaty on the Functioning of the European Union C/2022/9139 OJ L 327, 21.12.2022, p. 82–139

³¹ Communication from the Commission Guidelines for State aid in the agricultural and forestry sectors and in rural areas 2022/C 485/01 C/2022/9120 (OJ C 485, 21.12.2022, p. 1–90)

³² Communication from the Commission Guidelines for State aid in the fishery and aquaculture sector a 2023/C 107/01 C/2023/1598 (OJ C 107, 23.03.2023, p 1 - 48).

³³ Regulation (EU) No 651/2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty (OJ L 187 26.6.2014, p. 1-78)

Member States without the need of a prior notification to the Commission, has also been amended. The revision adopted on 23 July 2021³⁴ aimed at facilitating national funding provided in the context of the new **Multiannual Financial Framework (MFF)**. The rules on EU funding and the relevant State aid rules have been aligned in order to avoid unnecessary complexities, while at the same time preserving competition in the Single market. The revision has also allowed for new possibilities for Member States to speedily provide aid for the recovery from the COVID-19 pandemic (**Recovery and Resilience Facility, RRF**). These new possibilities have concerned aid for energy efficiency in buildings, low emission mobility and broadband. A further amendment of the GBER ("**Green Deal GBER amendment**")³⁵ has been endorsed by the Commission on 9 March 2023 to reflect the recent changes to various sets of State aid Guidelines and to ensure that the GBER remains fit for the green and digital transition. This amendment grants Member States more flexibility to design and implement support measures in sectors that are key for the transition to climate neutrality and to a net-zero industry. It also helps speeding up investment and financing for clean tech production in Europe, in line with the Green Deal Industrial Plan. The Green Deal GBER amendment also sets the right foundations to tackle some of the economic effects stemming from Russia's war against Ukraine and contributes to the recovery of Europe's economy, affected also by the coronavirus pandemic and the high energy prices.

- De minimis regulation, Fishery de minimis regulation and SGEI de minimis Regulation

Other rules will be reviewed in the medium/long term are the Banking Communication 2013³⁶ (and related communications), the Airports and airlines Guidelines³⁷, the Railway Guidelines³⁸, general review of the GBER, the Rescue and Restructuring Guidelines³⁹, and the Guarantee notice⁴⁰.

The COVID-19 crisis and the State aid Temporary Framework - For assisting Member States in a coordinated economic response to mitigate negative repercussions of the various containment measures addressing the COVID-19 outbreak, on 19 March 2020 the Commission adopted the COVID-19 Temporary Framework (TF)⁴¹, based on Article 107(3)(b) TFEU to remedy a serious disturbance across the EU economy. The Commission acted decisively and fast and leveraged its experience from the financial crisis to design a set of rules in a fashion that respected the diversity of options chosen by Member States to support their economies. Member States have implemented a large variety of State aid measures, making use of different aid instruments, from credit-based instruments such as guarantees and subsidised loans to direct grants, recapitalisations and other non-repayable instruments. The TF has been amended seven times to keep it abreast of the various waves of the pandemic. As announced in May 2022, in light of the overall improvement of the sanitary crisis in Europe, the COVID Temporary Framework has not been extended beyond the set expiry date of 30 June 2022, with the exception of investment and solvency support measures that will be in place until 31 December 2023.

³⁴ Commission Regulation (EU) 2021/1237 of 23 July 2021 amending Regulation (EU) No 651/2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty, OJ L 270, 29.7.2021, p. 39–75, Entered into force on 1.8.2021

³⁵ Commission Regulation (EU) 2023/1315 of 23 June 2023 amending Regulation (EU) No 651/2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty and Regulation (EU) 2022/2473 declaring certain categories of aid to undertakings active in the production, processing and marketing of fishery and aquaculture products compatible with the internal market in application of Articles 107 and 108 of the Treaty (OJ L 167, 30.6.2023, p. 1–90)

³⁶ OJ C 216, 30.7.2013, p. 1–15

³⁷ OJ C 99, 4.4.2014, p. 3

³⁸ OJ C184 of 22/07/2008, p. 13

³⁹ OJ C 249, 31.7.2014, p. 1–28

⁴⁰ Commission Notice on the application of Articles 87 and 88 of the EC Treaty to State aid in the form of guarantees, OJ C 155, 20.6.2008, p. 10–22

⁴¹ Communication from the Commission Temporary Framework for State aid measures to support the economy in the current COVID-19 outbreak 2020/C 91 I/01 C/2020/1863 OJ C 91I , 20.3.2020, p. 1–9

The current State aid Scoreboard provides a factual update on the amounts of aid provided to support the economy as a response to the COVID-19 outbreak in 2020, 2021 and 2022.

European Recovery Plan – In an effort to mitigate the economic and social impact of the coronavirus pandemic and make European economies and societies more sustainable, resilient and better prepared for the challenges and opportunities of the green and digital transitions, the European Union has set up the NextGenerationEU, with the Recovery and Resilience Facility (RRF) as its key funding instrument. The RRF contains a funding facility of EUR 723.8 billion (in current prices) in grants and loans, raised by the European Commission by issuing bonds on behalf of the EU.

The implementation path requires that Member States prepare recovery and resilience plans that set out a coherent package of reforms and investment initiatives to be implemented as of February 2020 until the end of 2026 and supported by the RRF. These plans are assessed by the Commission and approved by the Council. The EU pays up to 13% of the total support upfront to kick-start the recovery. Member States can then implement the investments and reforms set out in their plans. The disbursement of further funds can be requested after the completion of milestones and targets.

Funding from the RRF is under the control of Member States and, therefore, can constitute State aid. DG Competition has prepared and published several State aid guiding templates, which aim to assist Member States with the design and preparation of the State aid elements of their recovery and resilience plans, and to provide guidance on the State aid-related aspects of the types of investments that are expected to be common to most of those plans. The guiding templates provide sector-specific guidance as to when i) the existence of State aid may be excluded and, therefore, a prior notification to the Commission is not necessary; ii) State aid would be involved but no notification is necessary, and specific rules may apply (in case of aid exempted from the notification obligation); iii) State aid would be involved and a notification is necessary, with reference to the main applicable State aid rules. The Commission aims to complete the assessment of notified State aid measures within six weeks of receiving complete notification from the Member State.

The Temporary Crisis Framework and the Temporary Crisis and Transition Framework for State Aid measures to support the economy following the aggression against Ukraine by Russia – On 23 March 2022, the European Commission adopted a Temporary Crisis Framework (TCF)⁴² to enable Member States to use the flexibility foreseen under State aid rules to support the economy in the context of Russia's invasion of Ukraine, while complying with a set of rules aiming to minimise distortions to competition in the Single Market. The State aid Temporary Crisis Framework to support the economy in the context of Russia's invasion of Ukraine, based on Article 107(3)(b) of the Treaty on the Functioning of the European Union ('TFEU'), recognises that the EU economy is experiencing a serious disturbance. The Temporary Crisis Framework has been amended on 20 July 2022 and on 28 October 2022. On 9 March 2023, the Commission adopted the **Temporary Crisis and Transition Framework** to foster support measures in sectors which are key for the transition to a net-zero economy, in line with the Green Deal Industrial Plan.

Until 31 December 2023, the Temporary Crisis and Transition Framework enables Member States to cushion the economic impact of Russia's aggression of Ukraine and to (i) ensure that sufficient liquidity remains available to businesses; (ii) incentivise additional reduction of electricity consumption. Until 31 December 2025, Member States may grant aid to foster the transition to a net-zero economy. On 20 November 2023, the Commission decided to delay the phase-out of the remaining sections 2.1 (limited amounts of aid) and 2.4 (aid to compensate for high energy prices) by six months until 30 June 2024 considering the persisting uncertainties in the energy market and to facilitate administrative implementation.

The transition rules, applicable until 31 December 2025, in the TCTF allow Member States to accelerate investments in renewable energy production and storage (section 2.5), industrial decarbonisation (section 2.6) and the additional flexibility for support for research and innovation

⁴² Communication from the Commission Temporary Crisis Framework for State Aid measures to support the economy following the aggression against Ukraine by Russia 2022/C 131 I/01 C/2022/1890 OJ C 131I , 24.3.2022, p. 1-17

in section 2.8 of the TCTF, which covers productive investments in certain essential clean technologies (batteries, solar panels, wind turbines, heat-pumps, electrolyzers and carbon capture usage and storage) as well as their key components and critical raw materials.

State aid expenditure made by Member States under the TCTF in 2023 will be disclosed in the 2024 edition of the State aid Scoreboard.

Foreign Subsidies Regulation (FSR) - In recent years, foreign subsidies appear to have distorted the EU's internal market, including by providing their recipients with an unfair advantage to acquire companies or obtain public procurement contracts in the EU to the detriment of fair competition. The FSR, entered into force on 12 January 2023, addresses such distortions and closes a regulatory gap, whereby subsidies granted by non-EU governments go currently unchecked, while subsidies granted by Member States are subject to close scrutiny. It proposes new tools to effectively tackle foreign subsidies that cause distortions and undermine the level playing field.

3 Overall trends on State aid expenditure

3.1 Total State aid expenditure

The State aid Scoreboard presents State aid expenditures in terms of **aid element** granted by the Member State to the recipient of the aid. The aid element does not represent the nominal amount granted by the public authority, but measures **the economic advantage passed on to the undertaking**. Therefore, the aid element depends on the type of instrument used: for grants, the advantage passed on to the beneficiary normally corresponds to the budgetary expenditure. For other aid instruments, such as loans or guarantees, the advantage to the beneficiary and the cost to government is respectively the lower interest rate and the reduced guarantee fee actually paid by the undertaking with respect to the one that should have been paid at market values. Further methodological details on the calculation of the aid element can be found in Section 11.

All the figures reported hereinafter refer to all types of aid, including aid for agriculture and fisheries, while only aid to railways and to the financial sector are excluded. These two categories are presented separately in Section 5.6 and Section 5.7 respectively.

According to the national expenditure reports for 2022⁴³, spending was reported for **7 849 active measures**, of which a large majority were schemes (77%). Among all the active measures, 445 (6% of total active measures) are measures related to the COVID-19 crisis and 104 (1%) are related to the Russian invasion of Ukraine approved under the TCF or based on its principles. **The new measures for which Member States have spent for the first time in 2022 are 2 635.** The new COVID-19 related measures are 166, corresponding to 7% of the total new measures, while the measures implemented in response to the Russian invasion of Ukraine represent 4% of the new measures. New GBER measures are 1 901, which represents 72% of the total new measures and 80% of the new non-crisis measures. In 2022 Member States reported expenditure for 284 new ABER measures and 18 new FIBER measures. Including ABER and FIBER measures, the **new measures implemented under block exemptions** account for **84%** of total new measures and **93%** of total new non-crisis measures.

EU 27 Member States spent EUR 227.98 billion, corresponding to 1.4% of their 2022 GDP, on State aid for both crisis and other measures. Total expenditure for COVID-19 measures amounted to EUR 76.66 billion, covering around 34% of the total spending and representing 0.48% of EU27 GDP, while expenditure for measures related to the Russian invasion of Ukraine (TCF related measures) amounted to 39.33 billion, around 17% of the total spending and 0.25% of the EU27 GDP. Although crisis measures represent a minority of all active measures in 2022 (around 7%), they mobilised significant levels of support to ensure that otherwise viable businesses hard-hit by the COVID-19 pandemic crisis and by the energy crisis following the Russian war of aggression against Ukraine could keep afloat.

In relative terms, looking at the distribution of State aid expenditure at the Member State level as a share of national GDP (Figure 1), **there still a significant spending dispersion across Member States, although consistently reduced if compared to 2021.** While in the previous year, the dispersion ranged between 4.6 and 0.9 percent of national GDP, in 2022 it ranged between 2.1 and 0.3 percent of national GDP. The Member States spending the most, spent around 2.1-1.8 of their national GDP (Hungary and Germany), while the Member State spending the least, spent around 0.3 percent of GDP (Ireland), followed by Cyprus and Luxembourg, with around 0.5-0.8 percent of their national GDP.

Figure 2 shows the breakdown of the expenditure as a share of national GDP (grey bar) into expenditure for non-crisis State aid measures (blue bar), COVID-19 related measures (yellow bar), TCF related measures (light blue bar).

⁴³ Submitted in conformity with Article 6(1) of Commission Regulation (EC) 794/2004.

Austria is the Member State with the largest share of COVID-19 State aid expenditure relative to 2022 national GDP (1.03%), followed by Greece, Italy, and Malta. Slovenia and Belgium are the Member States that spent the least in relative terms, followed by Ireland, Sweden, Estonia and Poland.

Germany and Spain are the Member States with the largest share of State aid expenditure in response to the Russian invasion of Ukraine relative to 2022 national GDP (0.62% and 0.54% respectively). Cyprus and the Netherlands are the Member States that spent the least in TCF related State aid in relative terms, followed by Estonia and Malta.

Looking at the proportion between non-crisis State aid and different types of crisis aid, COVID-19 aid accounts for more than 50% of the expenditure in Austria, Greece, and Italy. Spain is the Member State dedicating more than 40% of the State aid expenditure in 2022 to address the negative consequences of the Russian invasion of Ukraine.

Figure 1: Total State aid expenditure by Member States, as % of national 2022 GDP

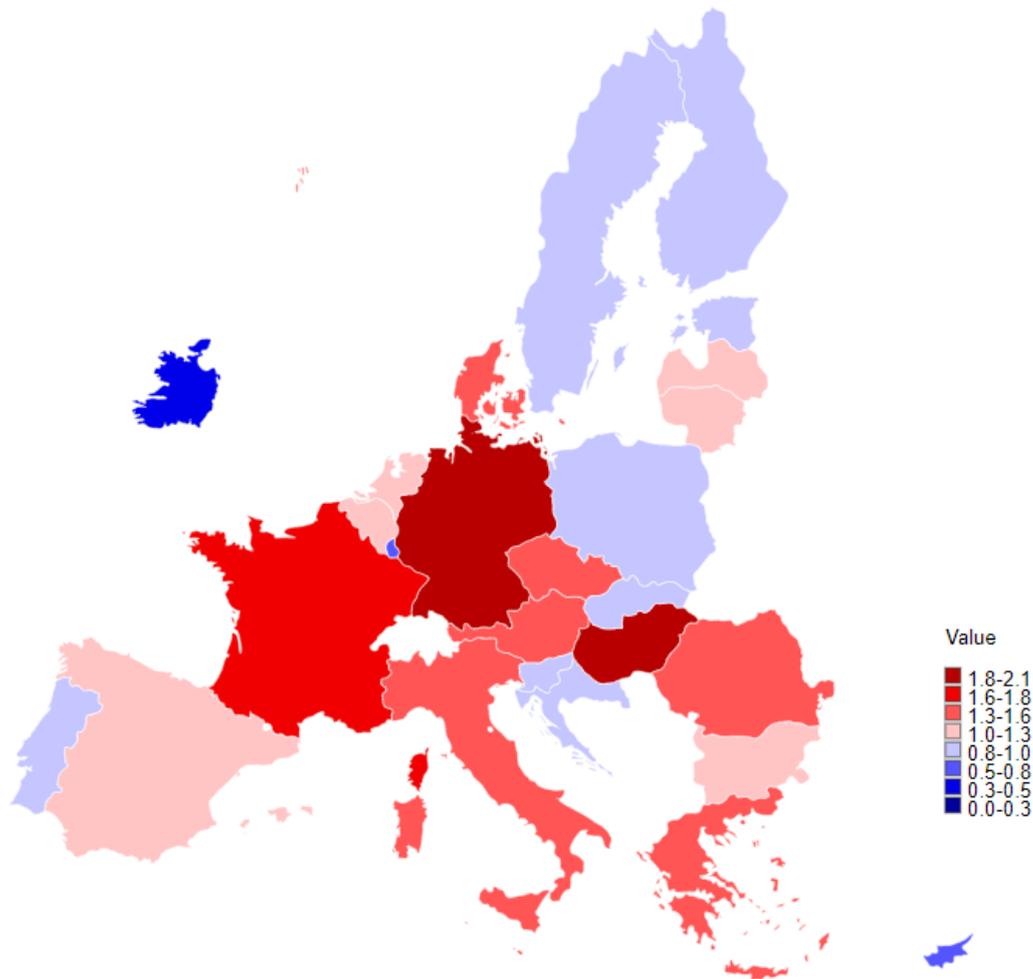
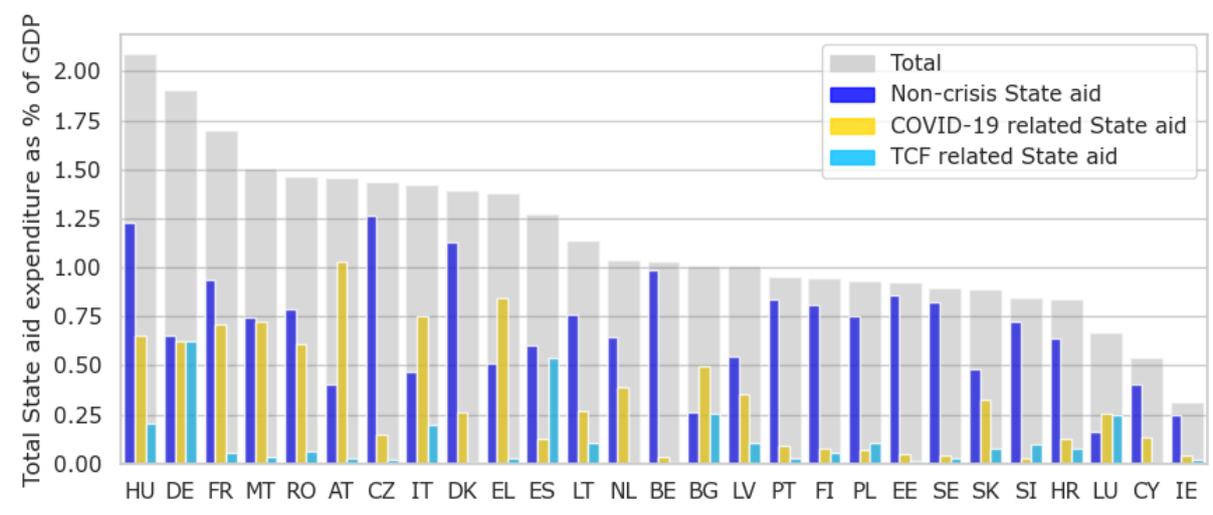


Figure 2: Total State aid expenditure by Member State, as % of 2022 national GDP, breakdown between COVID-19, State aid in response to the Russian invasion of Ukraine and other State aid measures



In nominal terms, as represented in Figure 3, the Member State spending the most in 2022 is Germany with EUR 73.67 billion, representing around 32.3% of the total State Aid expenditure in the EU27. France is the second largest spender with EUR 44.79 billion (19.6%), followed by Italy with EUR 26.61 billion (12.1%), Spain with EUR 17.12 billion (7.5%), the Netherlands with EUR 9.92 billion (4.4%) and Austria with EUR 6.52 billion (2.9%). The Member State spending the least in 2022 was Cyprus with EUR 149.49 million (less than 0.1% of the total State aid expenditure). Concerning the COVID-19 State aid measures (yellow bar), again Germany is the Member State that has granted the most with 31.5% of the total aid paid out under COVID-19 measures (EUR 24.16 billion), followed by France with EUR 18.64 billion (24.3%), Italy (EUR 14.68 billion, 19.2%), Austria (EUR 6.6 billion, 6%) and the Netherlands (EUR 3.74 billion, 4.9%). Focusing on TCF-related State aid measures (light blue bar), Germany has granted 61.5% of the total aid paid out under TCF-related measures (EUR 24.18 billion), followed by Spain with EUR 7.29 billion (18.5%), Italy (EUR 3.83 billion, 9.7%), France (EUR 1.38 billion, 3.5%) and Poland (EUR 666.8 million, 1.7%).

Figure 3: Total State aid expenditure by Member State, in EUR billion breakdown between COVID-19, State aid in response to the Russian invasion of Ukraine and other State aid measures

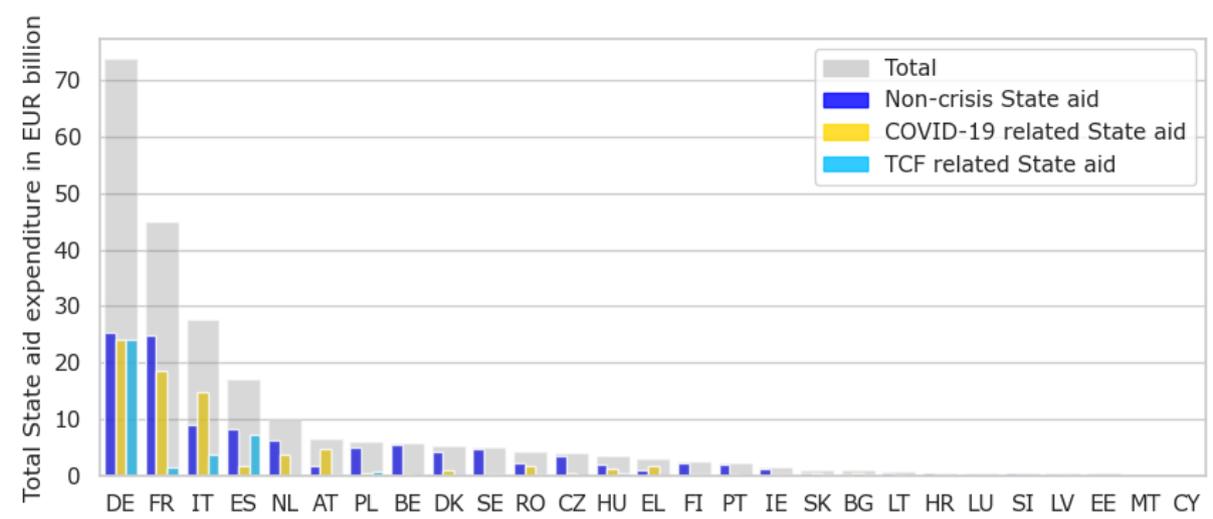


Figure 4 shows the evolution of the State aid expenditure in the EU-27 Member States over the last decade in absolute values. **The overall trend in the last decade shows a stable increase in State aid expenditure, with a huge spike in 2020 and 2021 due to the COVID-19 crisis, followed by a decrease in 2022.**

Not considering 2020 and 2021, **from 2012 to 2019 the State aid expenditure of EU-27 Member States has almost doubled in size** (EUR 78.84 billion in 2012 versus EUR 148.33 billion in 2019, in constant prices). Significant State Aid expenditure increase from 2012 to 2019 can be observed for: **Slovakia (+334%), Germany (+246%), Estonia (+226%), Lithuania (+169%)**. A positive trend is observable for most of EU-27 Member States in State Aid spending, except for: **Latvia (-73%), Slovenia (-18%), Finland (-16%), Portugal (-15%), Austria (-7%), Cyprus (-2%)**, where the expenditure in State aid measures was lower in 2019 than in 2012 in real terms.

In 2020, excluding the COVID-19 related State aid measures (blue bar), overall the **EU-27 Member States increased the provision of 'non-crisis' State aid by 2.3%** (from EUR 148.33 billion in 2019 to EUR 151.78 billion in 2020, in constant prices). On top of the expenditure for non-crisis related objectives, **in 2020 additional EUR 201.14 billion have been granted to remedy the serious disturbance of the economy provoked by the COVID-19 crisis**. Given the unprecedented levels of support that have been mobilised to counteract the negative shock due to the COVID-19 outbreak, 15 Member States (Austria, Cyprus, France, Germany, Greece, Italy, Latvia, Luxembourg, Malta, the Netherlands, Poland, Portugal, Slovakia, Slovenia) more than doubled their State aid expenditure in 2020.

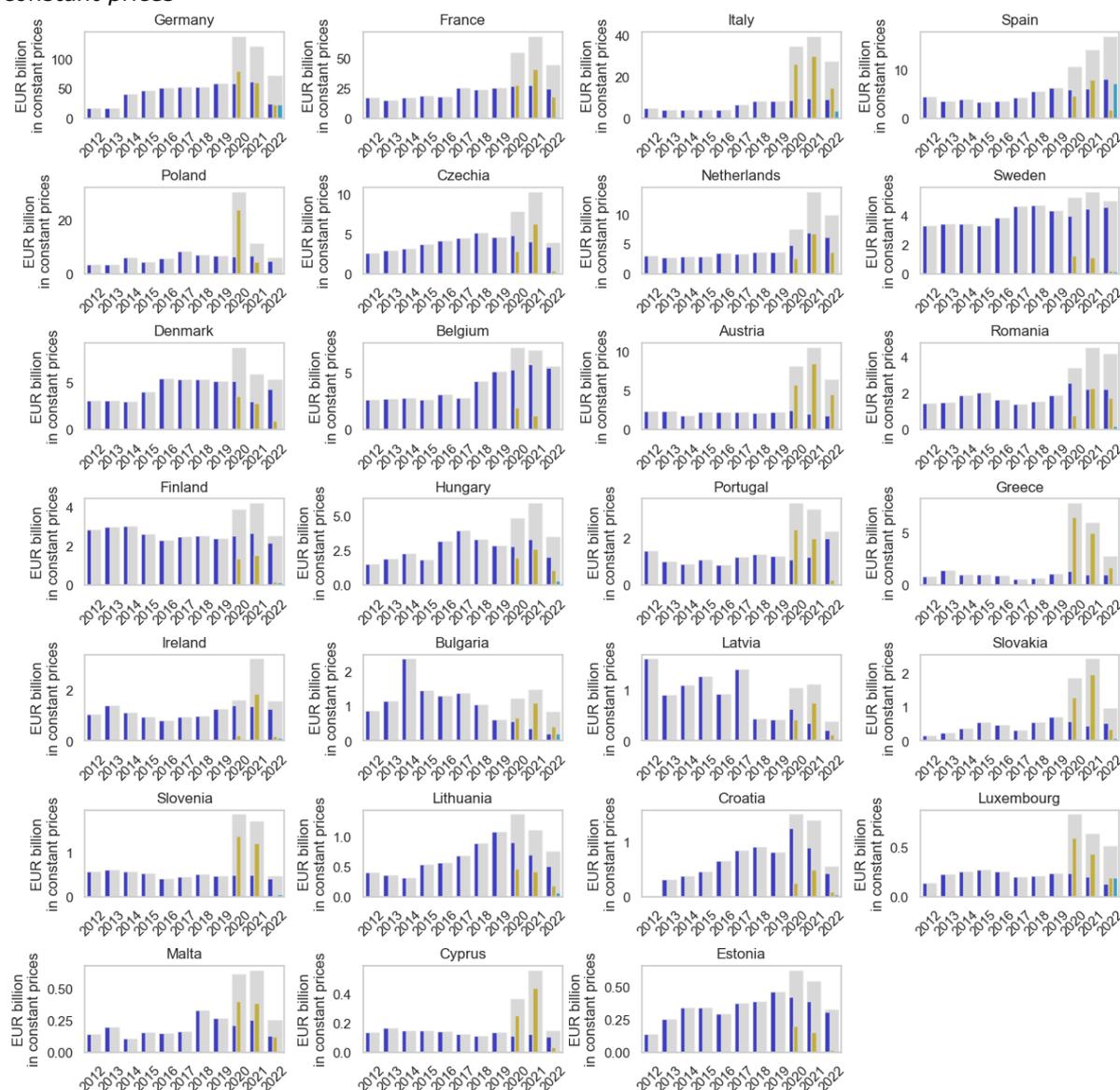
In 2021, the total State aid expenditure started slightly decreasing (-0.9%, from EUR 352.92 billion to EUR 349.7 billion). At the aggregate level, the **aid for non-crisis objectives slightly increased (+2.47%**, from EUR 151.78 billion to EUR 155.53 billion), **while COVID-related aid that decreased (-3.47%**, from EUR 201.14 billion in 2020, in constant prices, to EUR 194.17 billion in 2021).

In 2022, the total State aid expenditure strongly decreased (-34.8%, from EUR 349.7 billion to EUR 227.98 billion). **Both aid for non-objectives and COVID-related aid strongly reduced. Non-crisis aid reduced by almost one third (-28% in constant prices), COVID-related aid by almost two thirds (-61%). New measures to counterbalance the negative economic effects of the Russian invasion of Ukraine were put in place**, mobilizing approximately **EUR 39.33 billion**.

Spain was the only Member State to increase the aggregate expenditure in 2022, compared to 2021 (+20%). For all the other Member States an aggregate negative trend is observed, driven mainly by the reduction of COVID-19 related aid.

In 18 Member States (Belgium, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Hungary, Ireland, Latvia, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Sweden) the aid granted for non-crisis objectives was higher than the crisis-related aid in 2022.

Figure 4: Evolution of State aid expenditure from 2012 to 2022, by Member State, in EUR billion in constant prices



In **absolute terms** (Figure 5), **State aid spending in the EU 27 has been increasing since 2014**, the year when the GBER entered into force, with **two spikes in 2020 and 2021** due to the massive COVID-19 support (yellow bar). **COVID-19 support strongly decreased in 2022, as well as non-crisis aid.** In **2022, measures in response to the crisis provoked by the Russian invasion of Ukraine were also put in place.** Thus, despite the fact that the non-crisis aid is below the level it was in 2019, the total State aid expenditure is still consistently higher than it was before the pandemic.

In **relative terms**, as shown in Figure 6, **the total State aid expenditure as a share of EU 27 GDP reduced already in 2021, and then sharply decreased in 2022.** While the reduction in the expenditure for COVID-19 measures in percentage of GDP (yellow bar) drove the overall reduction in 2021, in 2022 it is **driven by the reduction of both COVID-19 related aid (-0.77 p.p. of EU GDP) but also by the reduction of aid for non-crisis objectives (-0.29 p.p. of EU**

GDP). This seems to indicate that **in 2022, with the continuation of the COVID-19 crisis and the consequent need to prolong the granting of COVID-19 aid measures, as well as the need to put in place new crisis measures to address the consequences of the Russian invasion of Ukraine, Member States have strongly reduced their spending capacity for non-crisis objectives.**

Figure 5: Evolution of total State aid expenditure from 2012 to 2022 in the EU27, in EUR billion, in current prices

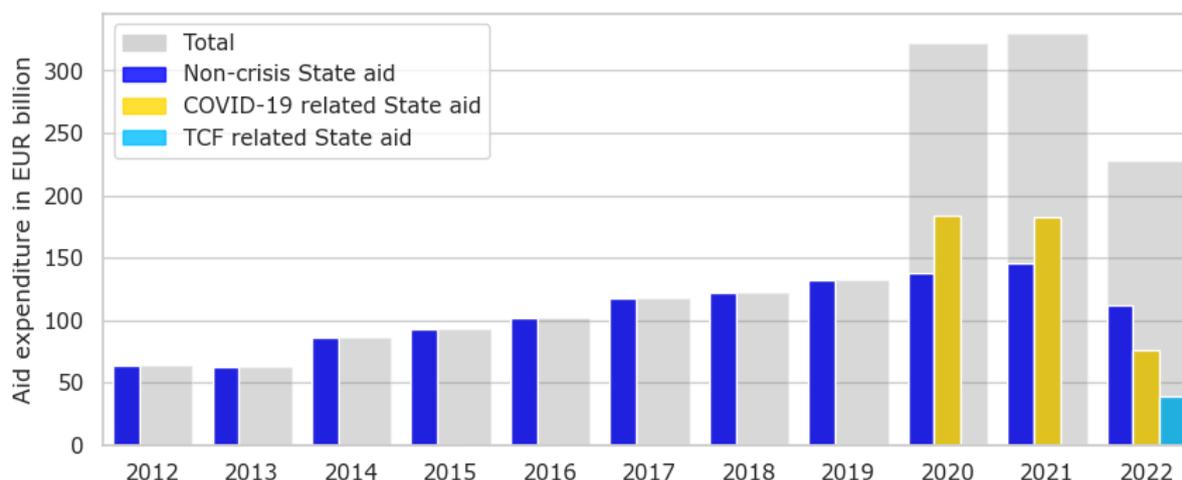


Figure 6: Evolution of total State aid expenditure from 2012 to 2022 in the EU27, as % of EU 27 GDP

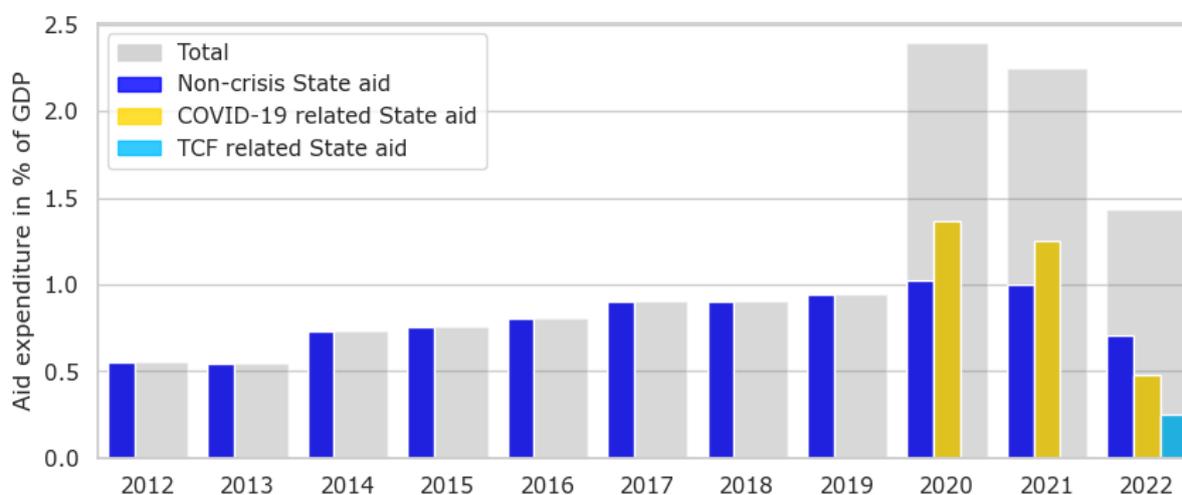


Figure 7 reports expenditures in 2021 (x axis) and in 2022 (y axis) as a percentage of yearly national GDP. Member States above the 45 degrees line reported an increase in total State aid expenditure in proportion to their GDP in 2022 as compared to 2021, those below a decrease. The upper chart includes all types of aid.

When looking at total expenditure from 2021 to 2022, **almost all Member States reduced their level of spending, although at different degrees.** Spain was the only Member State increasing the level of expenditure (+ 0.16 p.p.).

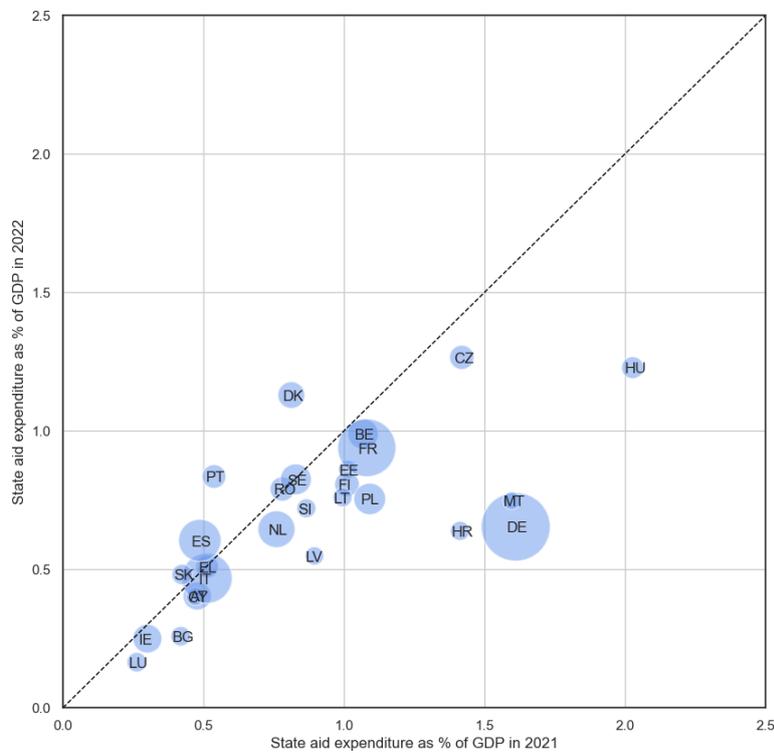
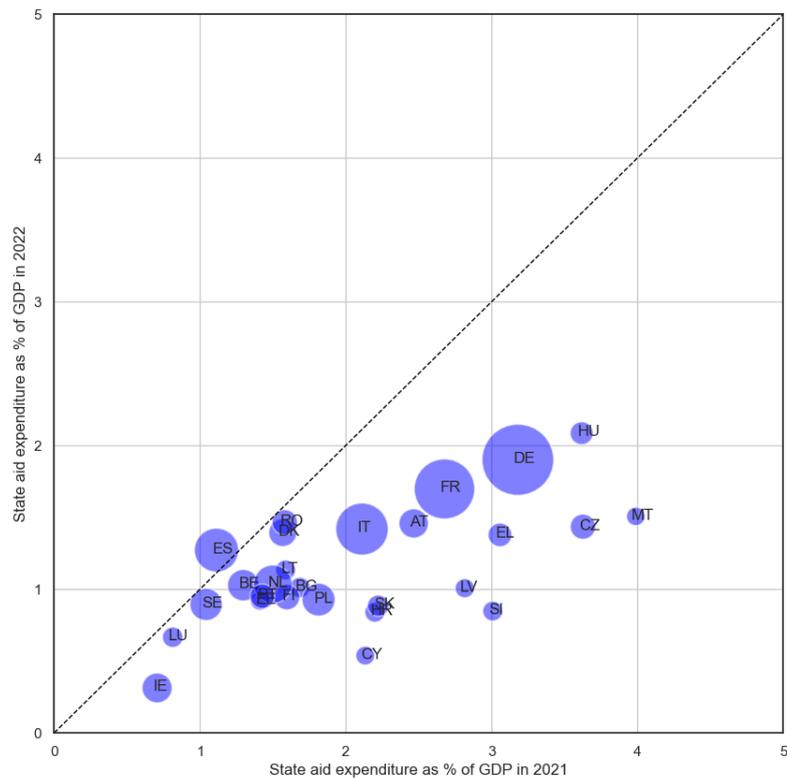
The most pronounced decrease is observed in Malta (-2.48 p.p.), Czechia (-2.19 p.p.), Slovenia (-2.16 p.p.), Latvia (-1.81 p.p.), Greece (-1.68 p.p.), Cyprus (-1.6 p.p.), Hungary (-1.53 p.p.), Croatia (-1.36 p.p.), Slovakia (-1.34 p.p.), Germany (-1.28 p.p.) and Austria (-1.01 p.p.)

To a lesser extent, the reduction is observed also in the other Member States: France (-0.98 p.p.), Poland (-0.89 p.p.), Italy (-0.69 p.p.), Bulgaria (-0.67 p.p.), Finland (-0.65 p.p.), Estonia (-0.49 p.p.), Portugal (-0.48 p.p.), the Netherlands (-0.46 p.p.), Lithuania (-0.45 p.p.), Ireland (-0.39 p.p.), Belgium (-0.27 p.p.), Denmark (-0.17 p.p.), Sweden and Luxembourg (-0.15 p.p.), and Romania (-0.12 p.p.)

The bottom chart focuses on non-crisis expenditure (excluding COVID-19 related and TCF related aid). **Excluding crisis-related expenditure from 2021 to 2022, there are different trends across Member States.** Four Member States increased their expenditure: Denmark (+0.32 p.p.), Portugal (+0.3 p.p.), Spain (+0.12 p.p.) and to a lesser extent, Slovakia (+0.06 p.p.). Five other Member States (Romania, Greece, Sweden, Italy, Ireland) kept their relative State aid spending for other objectives in 2022 as compared to 2021 almost constant, with a variation between -0.05 and +0.05 p.p. In all other 18 Member States⁴⁴, the expenditure compared to GDP has reduced. The largest decrease in State aid expenditure for non-crisis objectives relative to the GDP was recorded in Germany (-0.96 p.p.), Malta (-0.85 p.p.), Hungary (-0.8 p.p.), and Croatia (-0.77 p.p.).

⁴⁴ Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, Finland, France, Germany, Hungary, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Slovenia.

Figure 7: Evolution of total State aid expenditure between 2021 and 2022, as % of GDP, by Member State (upper chart); Evolution of State aid expenditure between 2021 and 2022 excluding COVID-19 expenditure and State aid in response to the Russian invasion of Ukraine, as % of GDP, by Member State (bottom chart)



N.B. The size of the dots is proportional to the 2022 GDP of the Member States.

3.2 Total State aid expenditure by instrument

State aid can take numerous forms, *i.e.*, direct grants, tax advantages (exemptions, reductions or deferrals), equity investments, soft loans/repayable advances, guarantees, *etc.* The choice of the most appropriate aid instrument is made in view of the market failure that the aid seeks to address, to generate the lowest possible distortive effects on competition and trade.

Comparing the evolution of expenditure by aid instrument from 2012 to 2022 (see Figure 8), **direct grants** and direct grants/interest rate subsidies⁴⁵ together are by far the aid instruments for which Member States have spent the most over the whole period. Around 43% of the total expenditure in 2022 was disbursed through direct grants and direct grants/interest rate subsidies, making this the largest used instrument, despite an 18 percentage points decrease compared to the previous year in which 61% of the expenditure was channelled through direct grants and direct grants/interest rate subsidies. **Tax advantages** were the second most used aid instrument, around 20% of total in 2022. This represents a 5 percentage points increase compared to 2021. While in the period 2012-2019 tax advantages have represented the second most used instrument, their relative use strongly decreased during the pandemic. Thus, despite they represented one fifth of the total aid in 2022, the relative share is still below the 2019 level, in which they represented approximately one third of the total expenditure.

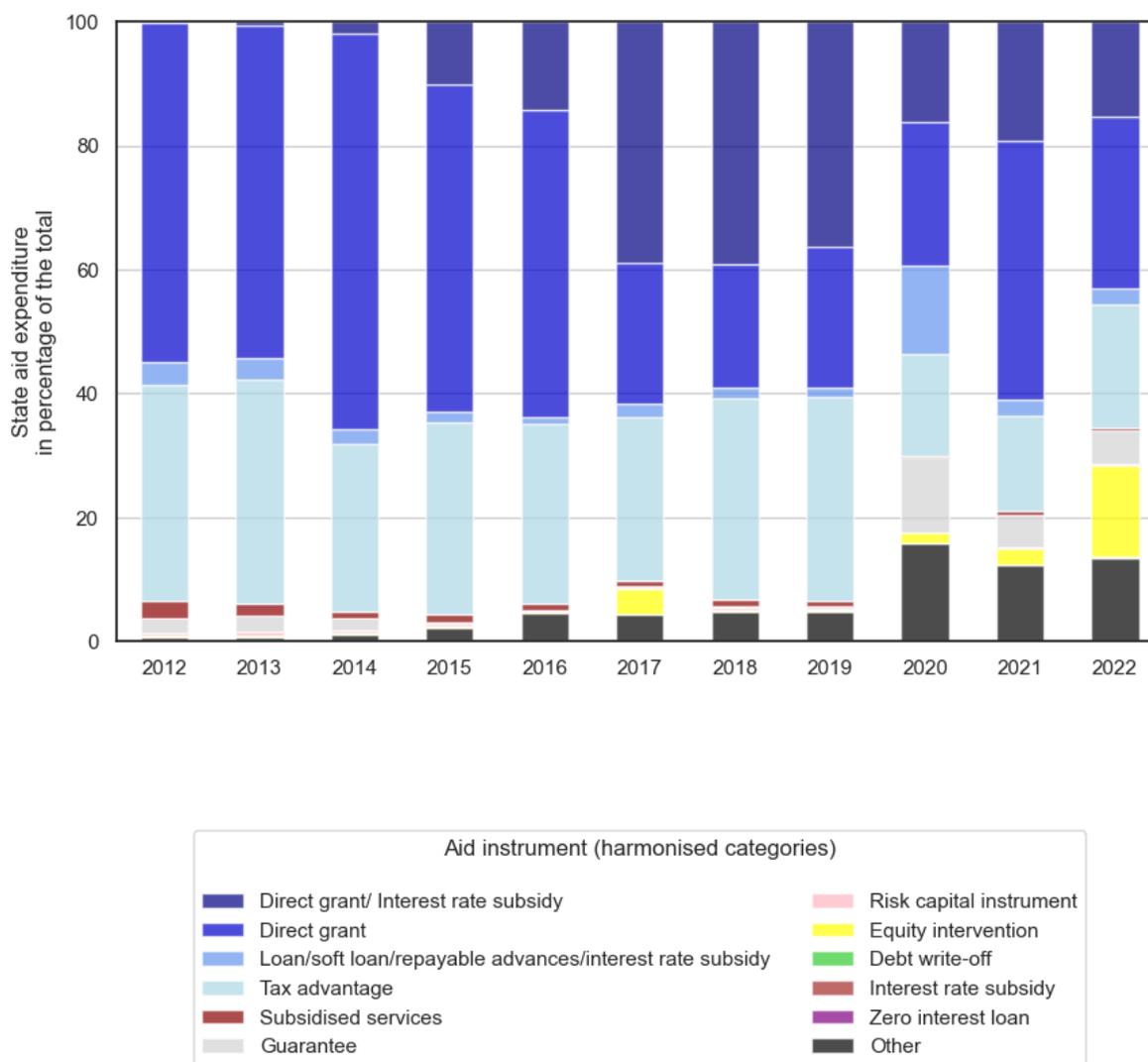
Equity interventions grew quite significantly, being the only instrument of which the use grew both in absolute amounts and as a share of the total. While in 2021, equity interventions represented around 3% of the aid expenditure, in 2022 they increased by 12 percentage points, getting to represent 15% of the total aid. This represents also a 11 percentage points increase compared to 2017, when they had reached the previous peak in relative share (around 4% of the total). The increase is driven by the large use of recapitalisation for crisis measures. Of the EUR 33.93 billion of equity intervention spent in 2022, only EUR 930 million (2.7% of the equity interventions) were realised under non-crisis measures. 97.3% of the equity interventions were realised under crisis measures, 38.6% of the equity interventions (EUR 13.08 billion) to remedy the serious disturbance in the economy caused by the COVID-19 outbreak, 58.7% (EUR 19.91 billion) in the context of the energy crisis that followed the Russian invasion of Ukraine.

Equity interventions are followed by the residual category **other**⁴⁶ (14%), guarantees (5%), loan/soft loan/repayable advances/interest rate subsidy (2% of the total). In general, it is worth noticing that the lower amounts of spending reported for repayable instruments (such as guarantees and loans) also depends on the lower aid element associated to these instruments as compared to their nominal amounts and not only to an actual less frequent use of these forms of aid.

⁴⁵ Direct grants/interest rate subsidies is a mixed category that Member States have used in their official reporting to the Commission. Although it is not possible to fully disentangle the two components, we estimate that most of the amounts reported under this mixed category takes the form of direct grants.

⁴⁶ This is strongly driven by a single German COVID-19 State aid scheme (SA.56790 - Federal Framework "Small amounts of aid 2020" - COVID-19), under which around EUR 16.23 billion, were reported by the German authorities as "other" (52% of the total amount reported as other), and by a Spanish scheme (SA.102454 - TCF - Spain - MIBEL fossil fuel cost adjustment mechanism) under which the expenditure of around EUR 6.45 billion represent around 21% of the amount reported under this category.

Figure 8: Share of total State Aid expenditure from 2012 to 2022 by type of aid instrument (in % of total)



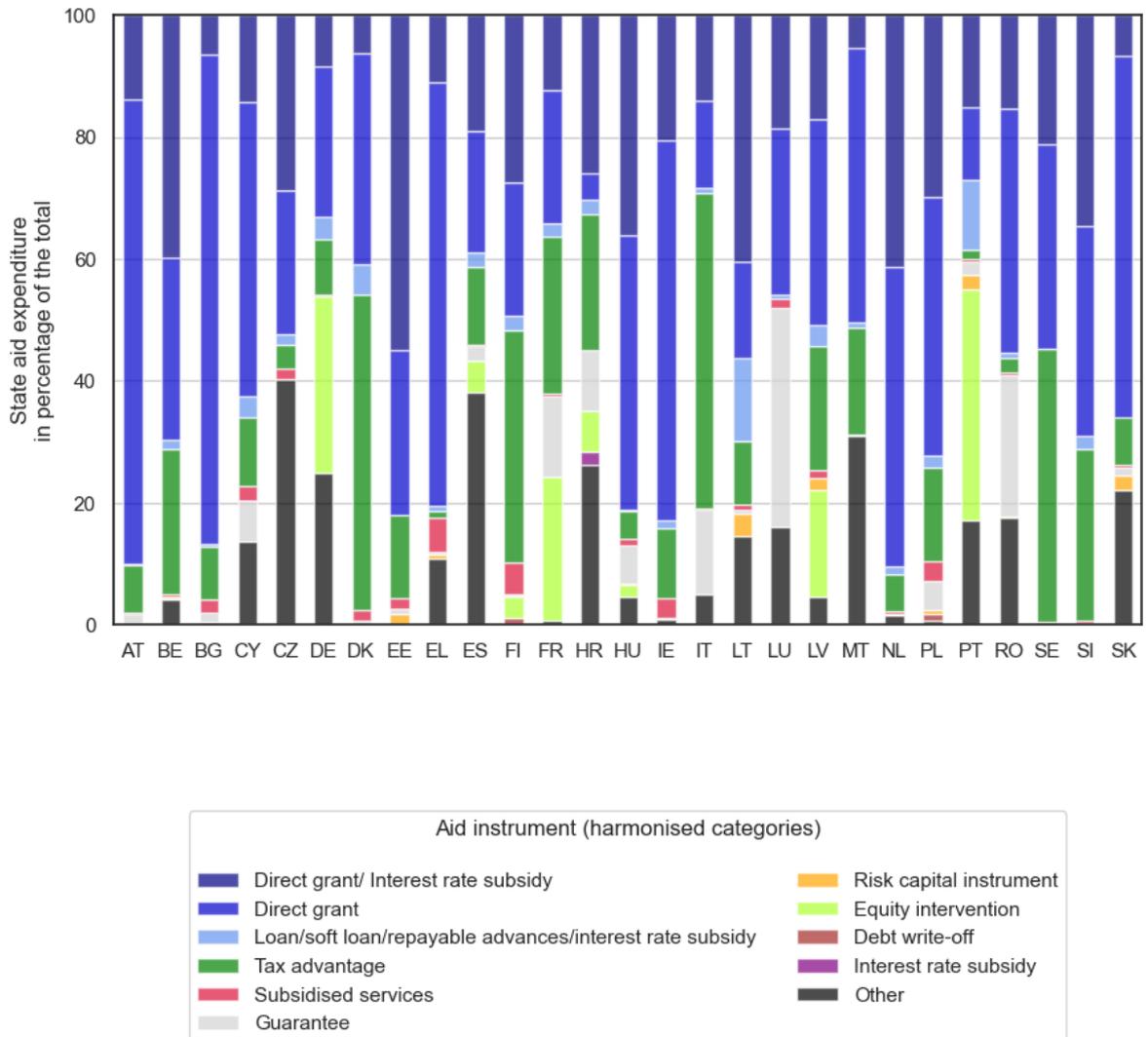
The majority of Member States provided most of their support to undertakings via non-repayable instruments in 2022 (Figure 9). Direct grants and direct grant/interest rate subsidy together account for more than 90% in Austria and the Netherlands, and for more than 50% in other 16 Member States (Belgium, Bulgaria, Cyprus, Czechia, Estonia, Greece, Hungary, Ireland, Lithuania, Latvia, Malta, Poland, Romania, Sweden, Slovenia, Slovakia). The Member States that have spent the least in direct grants (including the mixed category direct grants/interest rate subsidy) are Portugal (27%), Croatia (30%), Germany (33%), France (34%) and Denmark (39%).

Denmark and Italy implemented many tax advantage measures (around 52% each, of their total disbursement). Other Member States showing a significant share of tax advantages are Sweden (45%) and Finland (38%).

Portugal made the relatively largest use of equity interventions (around 38% of its aid expenditure), followed by Germany (29%), France (23%), and Latvia (17%). Guarantees on loans represent the 36% of total granting in Luxembourg and 23% in Romania, signalling a reliance on this type of credit-based instrument, whose aid element is a small fraction of the underlying contracts. Other Member States showing a significant share of guarantees are Italy (14%), France (13%) and Croatia (10%).

Czechia, Spain, Malta, Croatia and Germany recorded under 'other' one fourth or more of their total expenditure.

Figure 9: Total State Aid expenditure by Member State, by aid instrument, in percentage of the total



3.3 Total State aid expenditure by policy objective

To be compatible with the State aid rules, i) the aid must facilitate the development of an economic activity (positive condition), and ii) the aid shall not adversely affect the trading conditions to an extent contrary to the common interest (negative condition). Despite the general prohibition of State aid, in some circumstances government interventions are necessary for a well-functioning and equitable economy. Therefore, the Treaty leaves room for a number of policy objectives for which State aid can be considered compatible. However, in practice various State aid measures are often complementary and some of them might contribute to several objectives⁴⁷.

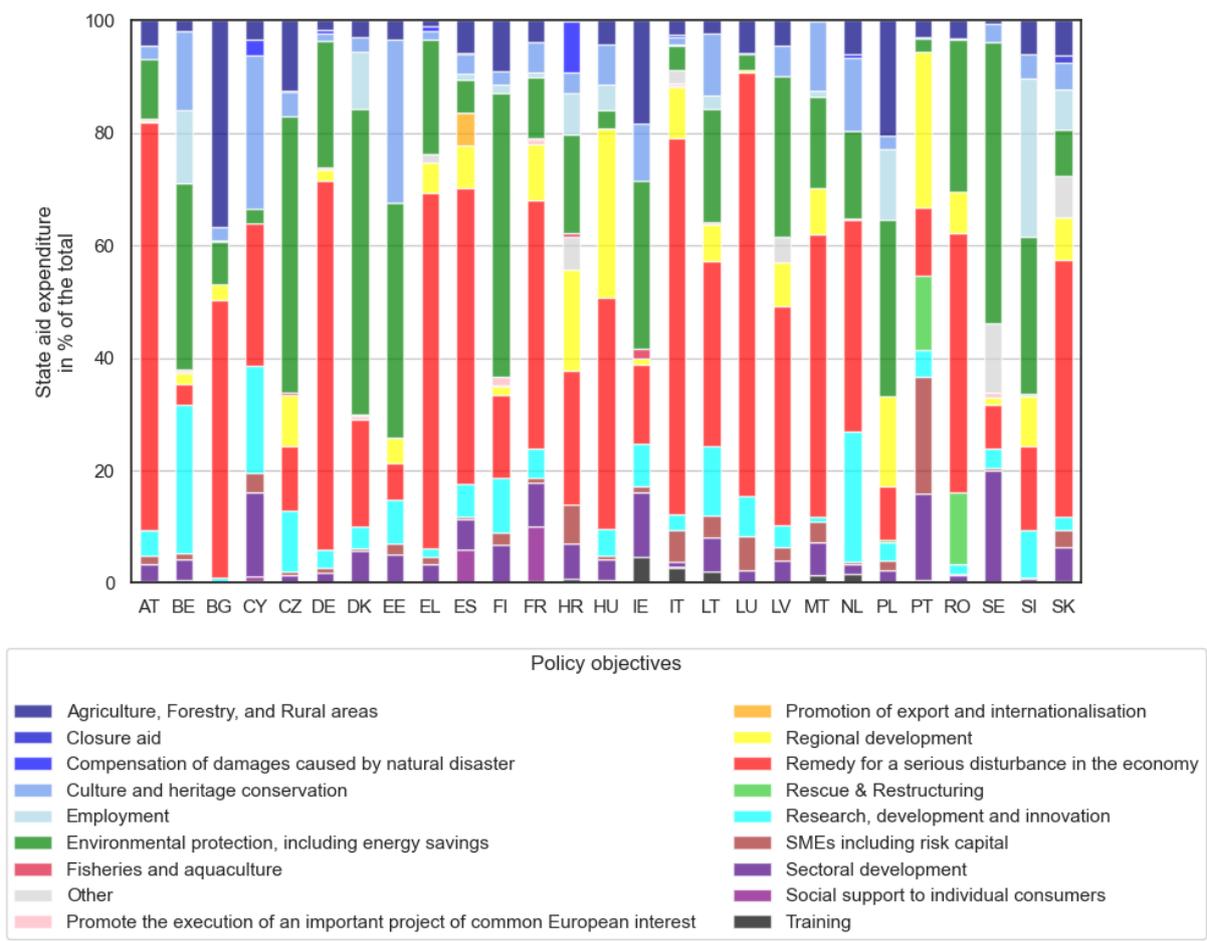
The TFEU also explicitly provides that aid to **remedy a serious disturbance in the economy** of a Member State may be compatible with the internal market. This provision can only be invoked

⁴⁷ For example, a regional aid scheme might be targeted at the sole benefit of SMEs located in an assisted region.

where the disturbance affects the whole or an important part of the economy of the Member State concerned, and not only some parts of its territory. The State aid Temporary Framework to support the economy in the context of the COVID-19 outbreak and the Temporary Crisis Framework, based on Article 107(3)(b) TFEU, recognises that the COVID-19 pandemic and the represents a serious disturbance in the EU economy. The Temporary Crisis Framework, also based on Article 107(3)(b) TFEU, then recognises that the aggression against Ukraine by Russia, the sanctions imposed the EU or its international partners and the counter measures taken, for example by Russia have created significant economic uncertainties, disrupted trade flows and supply chains and led to exceptionally large and unexpected price increases, especially in natural gas and electricity, but also in numerous other input and raw materials and primary goods, including in the agri-food sector. Those effects taken together have caused a serious disturbance of the economy in all Member States. Supply chain disruptions and increased uncertainty have direct or indirect effects that affect many sectors. In addition, rising energy prices affect virtually every economic activity in all Member States.

Member States have granted State aid for rather diverse objectives. Figure 10 shows the 2022 State aid expenditure by policy objectives by Member State. In order to make them comparable across Member States, amounts are reported in percentages of total State aid spending in each Member State.

Figure 10: Total State Aid expenditure by Member State, by policy objective, in percentage of the total.



As regards the four prime objectives at EU level in 2022:

- **Remedy for a serious disturbance in the economy** is the prime objective in 16 Member States.⁴⁸ It represents more than half of total spending in 7 Member States: Luxembourg (75%), Austria (72%), Italy (67%), Germany (66%), Greece (63%), Spain (53%), and Malta (50%). It is the second most used objective in Cyprus, Denmark, Finland. It **accounts for 50.3% of overall expenditure at EU level.**
- **Environmental protection, including energy savings** is the prime objective in 8 Member States: Denmark (54%), Finland (51%), Sweden (50%), Czechia (49%), Estonia (42%), Belgium (33%), Poland (31%), and Ireland (30%). It is the second most used policy objective in 10 Member States: Austria, France, Germany, Greece, Lithuania, Latvia, Malta, Romania, Slovenia, and Slovakia. It **accounts for 18.2% of overall expenditure at EU level.**
- **Regional development** is the prime objective in Portugal (28%). It constitutes the second most used objective in Croatia, Hungary, Italy, and Spain. It **accounts for 6.1% of overall expenditure at EU level.**
- **Research, development, and innovation** is the second most used objective in Belgium, the Netherlands and Luxembourg. It **accounts for 5.6% of overall expenditure at EU level.**

⁴⁸ All excluding Belgium, Czechia, Denmark, Estonia, Finland, Ireland, Poland, and Sweden and Slovenia, where the prime objective is environmental protection including energy savings. Cyprus, where the prime objective is culture and heritage conservation. Portugal, where the prime objective is regional development. Slovenia where the prime objective is employment.

4 Total State aid expenditure for non-crisis measures

4.1 State aid expenditure for non-crisis objectives: environmental aid remains the main policy focus of Member States

In 2022, EU27 Member States spent EUR 112 billion on State aid for non-crisis measures. This corresponds to 0.7% of EU27 2022 GDP, covering around 49% of the total spending. State aid expenditure for non-crisis objectives strongly decreased since 2021, with a nominal decrease of around 23.4% (-EUR 34.21 billion), and the reduction is even more accentuated when adjusting for the effects of the inflation, in which case State aid expenditure for non-crisis objectives has **decreased by -28% compared to 2021** (-EUR 43.53 billion, see Figure 12). It appears that in 2022, due to the need to implement measures related to impact of Russia's war of aggression against Ukraine and the presence of expenditures related to the COVID-19 crisis, thus the prolonged need to provide crisis aid, Member States have decreased their ability to spend on non-crisis-related objectives.

Figure 11: Percentage change in total State aid expenditure for non-crisis objectives, 2017-2022, current prices

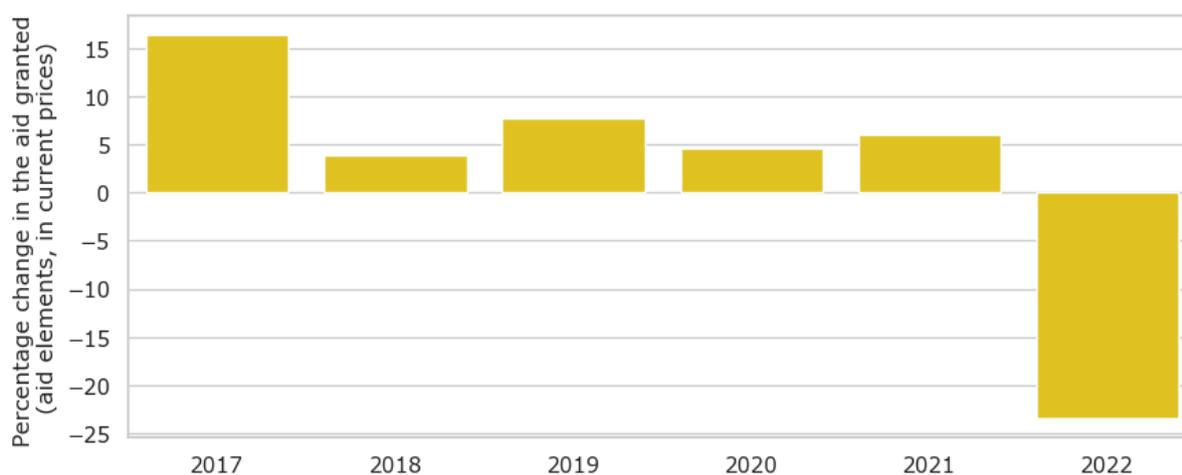
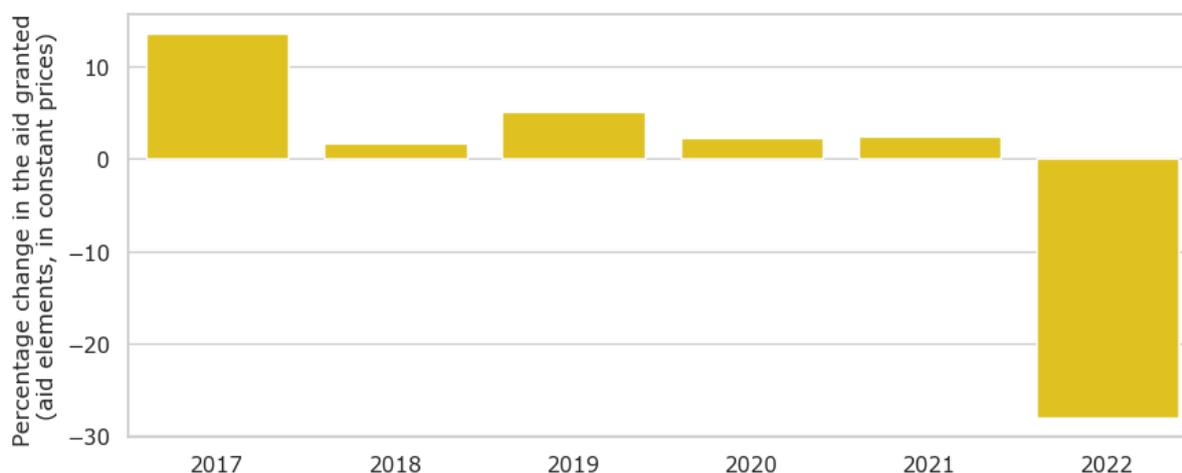


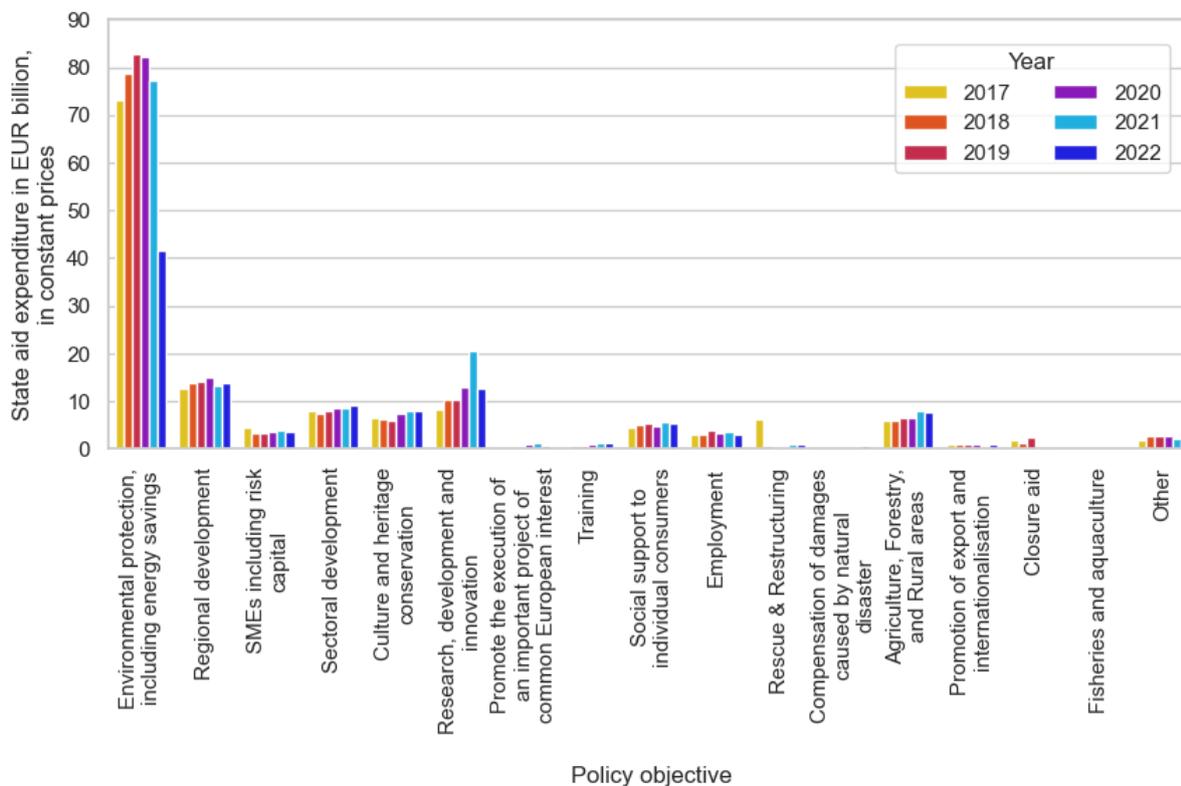
Figure 12: Percentage change in total State aid expenditure for non-crisis objectives, 2017-2022, constant prices



Looking at the evolution of State aid spending in the last six years, as depicted in Figure 13 with inflation-adjusted figures, **Environmental protection and energy savings is by far the policy objective for which Member States have spent the most**, with cumulative total expenditure of EUR 435.58 billion in constant prices. **However, the increasing trend observed until 2019** (from EUR 73.2 billion in 2017 to EUR 82.78 billion in 2019) **reversed already in 2020**, the expenditure for environmental aid slightly decreased (EUR 82.51 billion in 2020, corresponding to -1% in real terms compared to 2019). A more consistent decrease is then observed in 2021, when the expenditure for such objective has been EUR 77.29 in constant prices (-EUR 4.82 billion, -6% in real terms). Compared to 2021, in 2022 the aid for **Environmental protection and energy savings reduced by 46%**, also considering the effect of inflation, as the total expenditure for this objective was EUR 41.51 billion (-EUR 35.78 billion compared to 2021, in constant prices). Nevertheless, Environmental protection and energy savings alone accounts for 51% of the total expenditure for non-crisis objectives over the last six years, and 37% in 2022. Despite the decreased expenditure in 2022, environmental aid is more than five times larger than the cumulative expenditure under the second most used objective: **regional development** (EUR 82.9 billion from 2017 to 2022, of which EUR 13.91 billion in 2022). Regional aid slightly increased in 2022 compared to the previous year (from EUR 13.27 billion in 2021 to EUR 13.91 billion in 2022, corresponding to an increase of 4.8% in real terms). A total of EUR 75.21 billion has been spent under **research and development including innovation** from 2017 to 2022, of which EUR 12.69 billion in 2022. Despite the strong increase in 2021 of around the 60% (from EUR 12.85 billion in 2020 to EUR 20.57 billion in 2021), aid to research and development decreased by around 38% in real terms in 2022. These three prime non-crisis objectives cover around 70% of overall expenditure at EU level for non-crisis objectives in the period 2017-2022 and 61% in 2022.

Moreover, EUR 49.94 billion has been spent for **sectoral development** over the 2017-2022 period (of which EUR 9.21 billion in 2022), EUR 42.51 billion for **culture and heritage conservation** (of which EUR 8.13 billion in 2022) and EUR 40.93 billion for **agriculture, forestry, and rural areas** (of which EUR 7.72 billion in 2022).

Figure 13: Total State Aid expenditure for non-crisis objectives, by policy objective, 2017-2022, constant prices



The map and graph below (Figure 14 and Figure 15) display the State aid expenditure in Environmental protection and energy savings by Member State as a share of national GDP in 2022. In 2022, **Denmark** is the Member State that has spent the most on **Environmental protection and energy savings** measured in real terms, namely **0.76% of national GDP**. Denmark is followed by Czechia (0.71% of its own GDP), Finland (0.48%), Sweden (0.45%), Germany (0.43%), Romania (0.40%), Estonia (0.38%), Belgium (0.34%), Poland (0.29%) and Greece (0.28%), which are all above the EU27 average (0.26% of GDP). Cyprus, Luxembourg, and Portugal are the Member States spending the least on environmental aid in 2022, with less than 0.02% of national GDP.

Figure 14: State aid expenditure in Environmental protection and energy savings by Member State, as % of national GDP in 2022

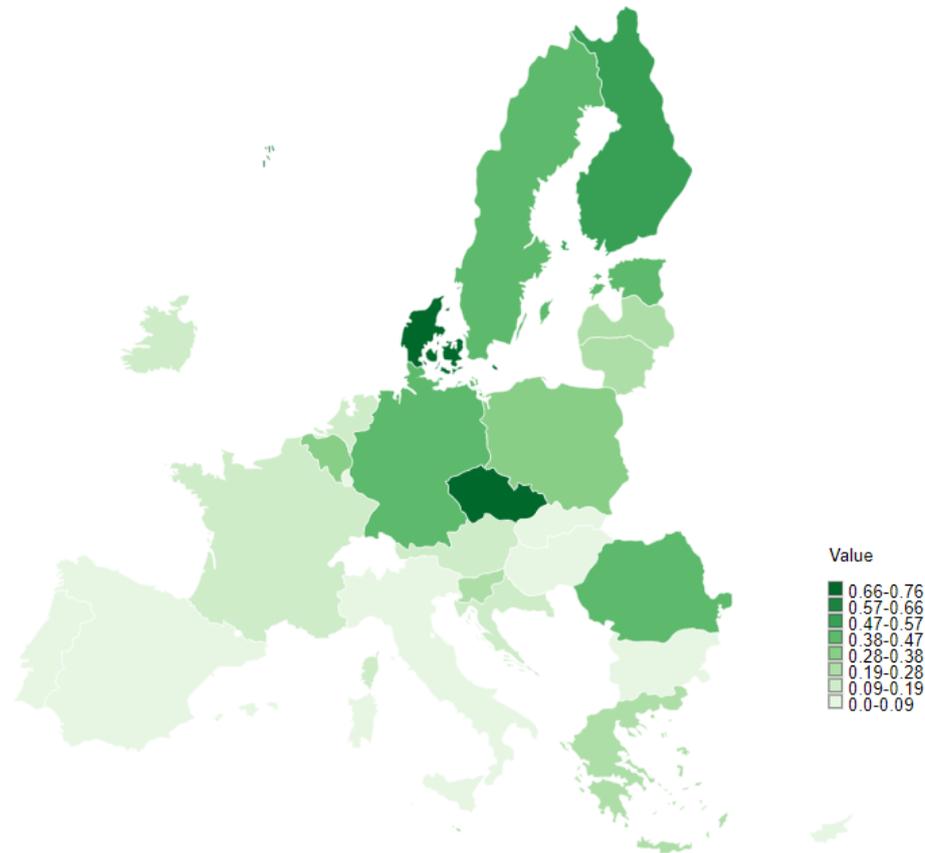
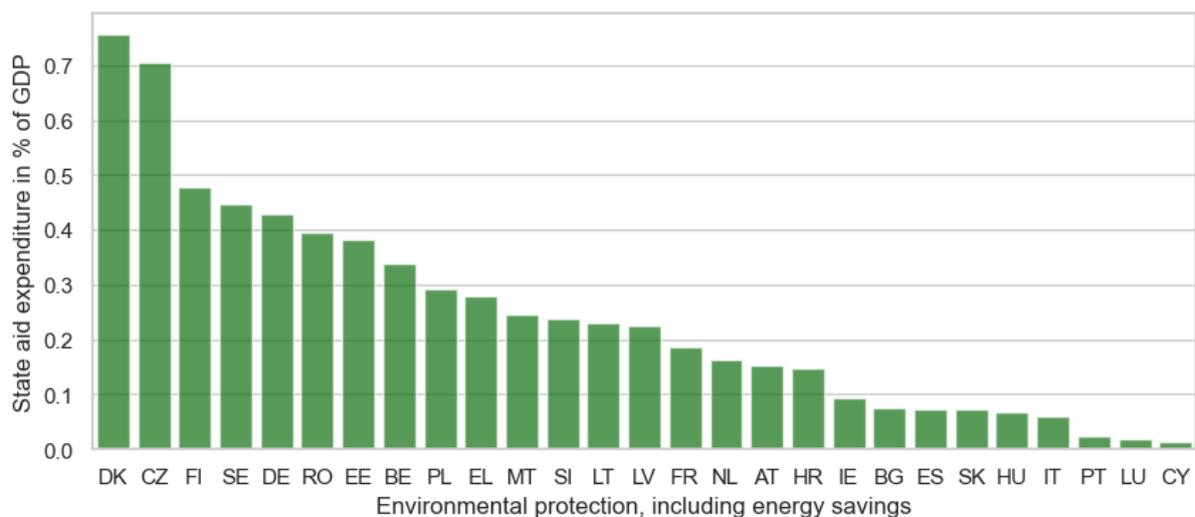


Figure 15: State aid expenditure in Environmental protection and energy savings by Member State, as % of national GDP in 2022



Regional development represents a significant share of State aid expenditure in **Hungary** (0.63% of national GDP), followed by **Portugal** and **France** with 0.26% and 0.17% of GDP respectively, as displayed in Figure 16 and Figure 17. The next ranked Member States – Croatia, Poland – account for a share of GDP of around 0.15%. Czechia and Italy (both around 0.13% of

their own GDP), Malta (0.12%), Romania (0.11%), and Spain (0.10%) are all above the EU27 average (0.09% of GDP).

Figure 16: State aid expenditure in Regional development by Member State, as % of national GDP in 2022

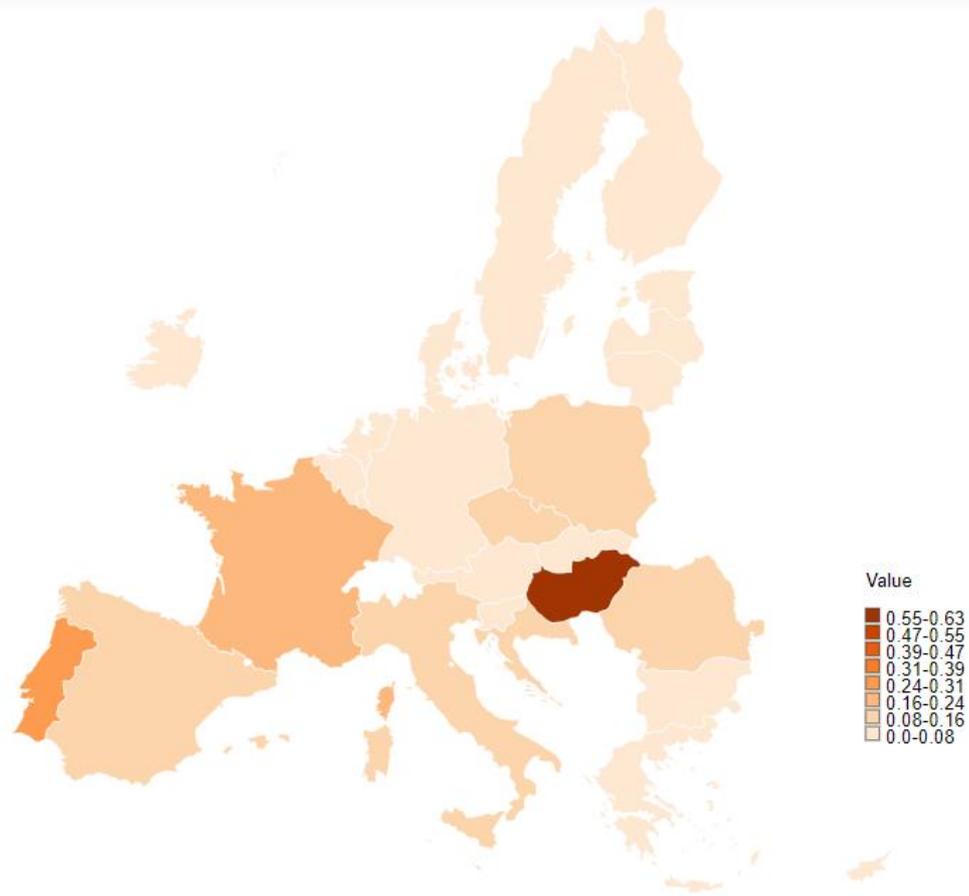
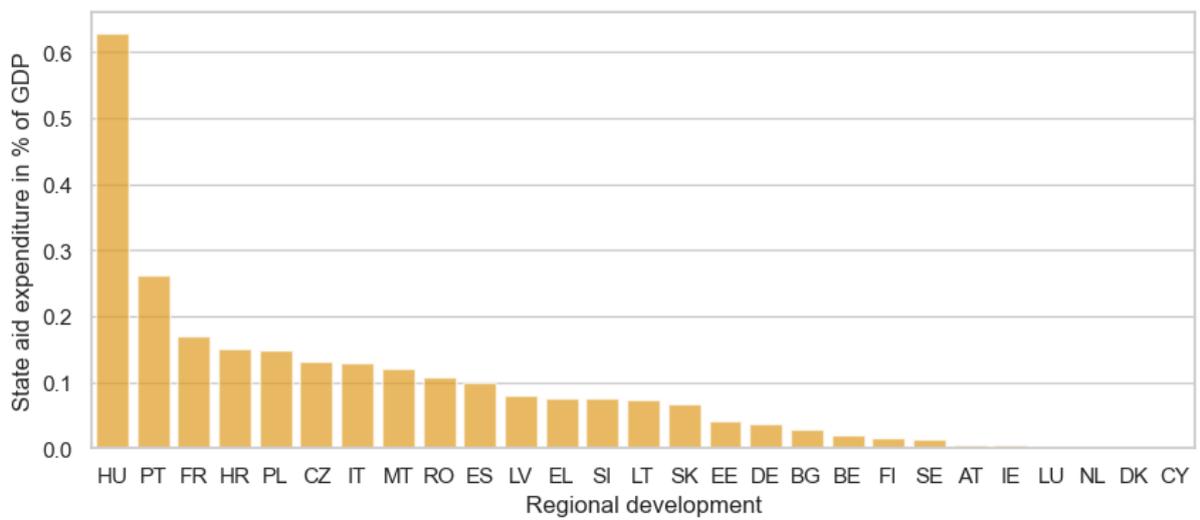


Figure 17: State aid expenditure in Regional development by Member State, as % of national GDP in 2022



Concerning **research, development and innovation** measures, **Belgium** and **the Netherlands** are the Member States that spent the most in 2022, with around 0.27% and 0.24% of their GDP respectively. They are followed by Czechia (0.16%), Lithuania (0.14%), Cyprus and Hungary (both around 0.10% of their own GDP), Finland and France (both around 0.09% of their own GDP) are all above the EU27 average (0.08% of GDP). (Figure 18 and Figure 19).

Figure 18: State aid expenditure in R&D&I by Member State, as % of national GDP in 2022

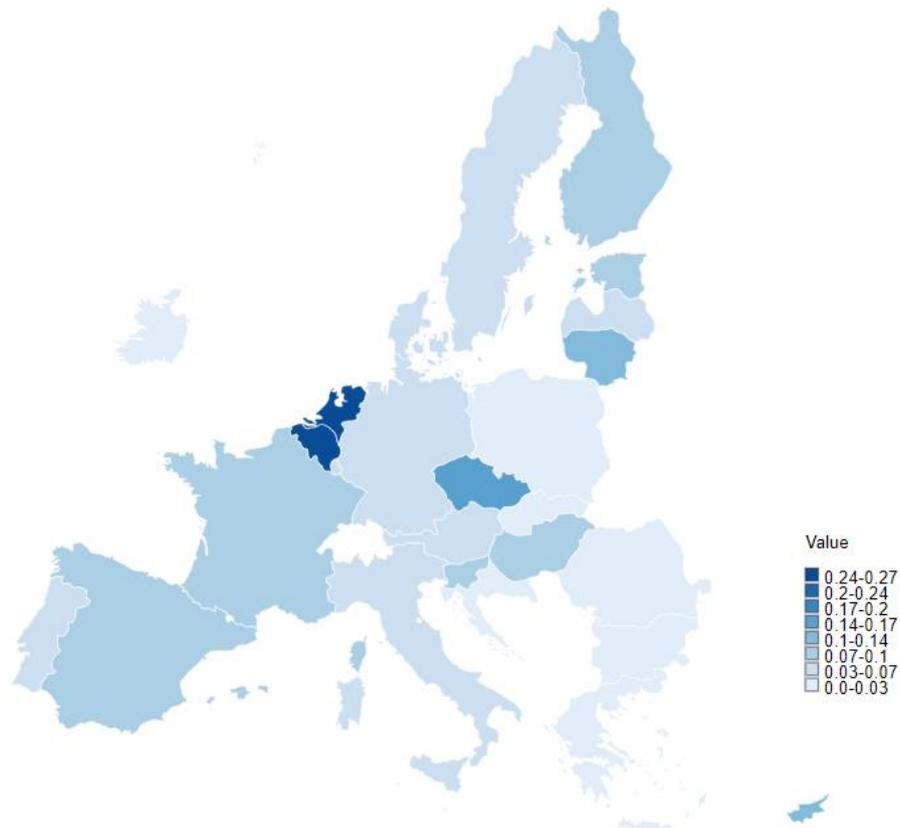
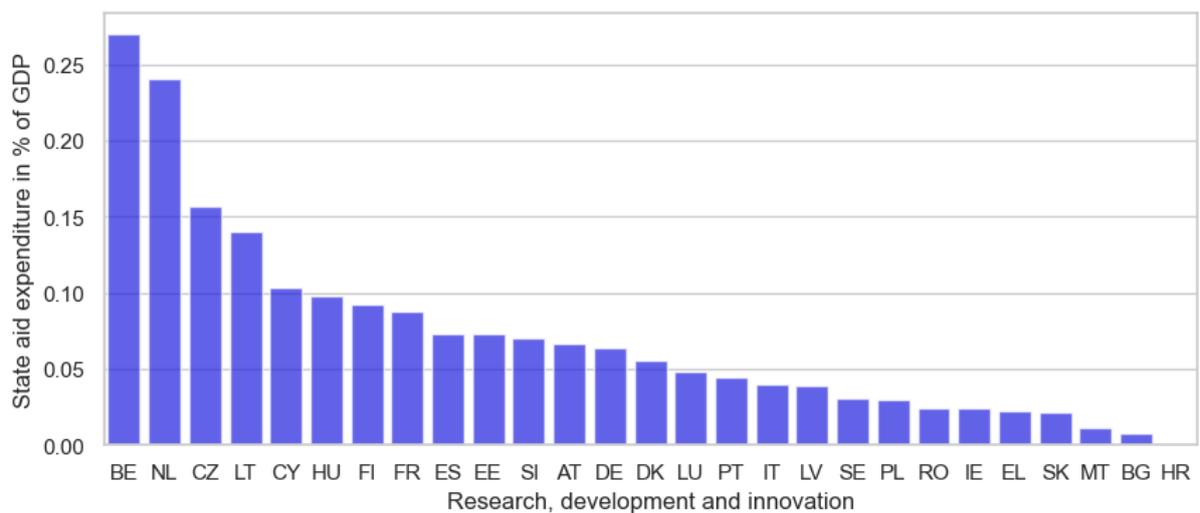


Figure 19: State aid expenditure in R&D&I by Member State, as % of national GDP in 2022

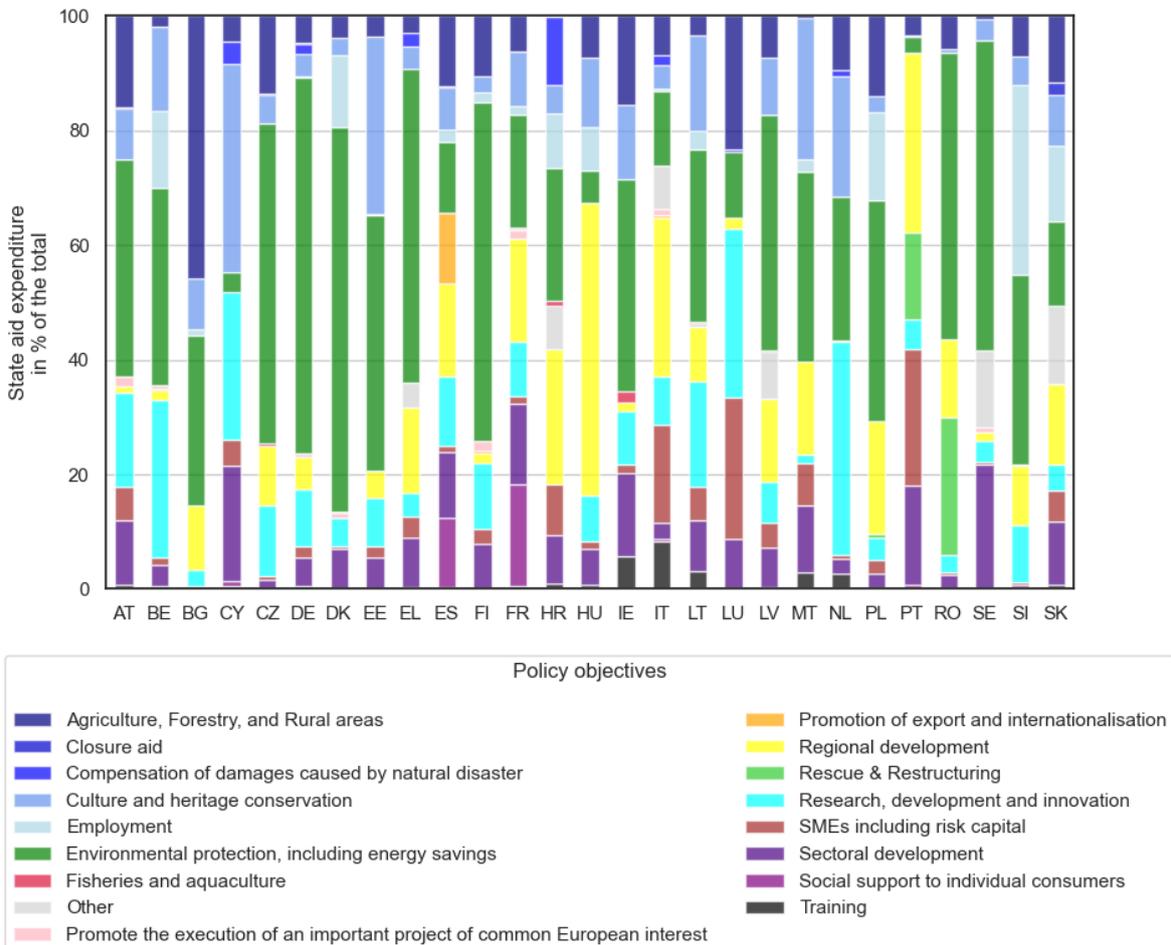


As regards the three prime non-crisis objectives at EU level in 2022:

- **Environmental protection and energy savings** is the prime objective, excluding crisis aid, in 17 Member States. It represents more than 50% of total spending for non-crisis measures in 7 Member States: Denmark (67%), Germany (65.6%), Finland (59.2%), Czechia (55.8%), Greece (54.8%), Sweden (54.1%) and Romania (50.1%).
- **Regional development** is the prime objective in Hungary (51.2%% of total spending excluding crisis aid), Portugal (31.5%), Italy (27.6%), Croatia (23.7%) and Spain (16.4%).
- **R&D&I** is the prime objective in the Netherlands (37.4% of the total spending excluding crisis aid) and Luxembourg (29.3%).

In some Member States, the three largest objectives at the aggregate level represent a minor share of State aid spending at national level. This is in particular the case of Cyprus, where these objectives only represent around 29.1% of total spending for non-crisis measures, while culture and heritage conservation is the prime objective. Moreover, in Slovenia a large share of national resources targets employment (prime objective, accounting for 33.2% of non-crisis spending). Agriculture, Forestry and Rural areas is the prime objective in Bulgaria (45.8%).

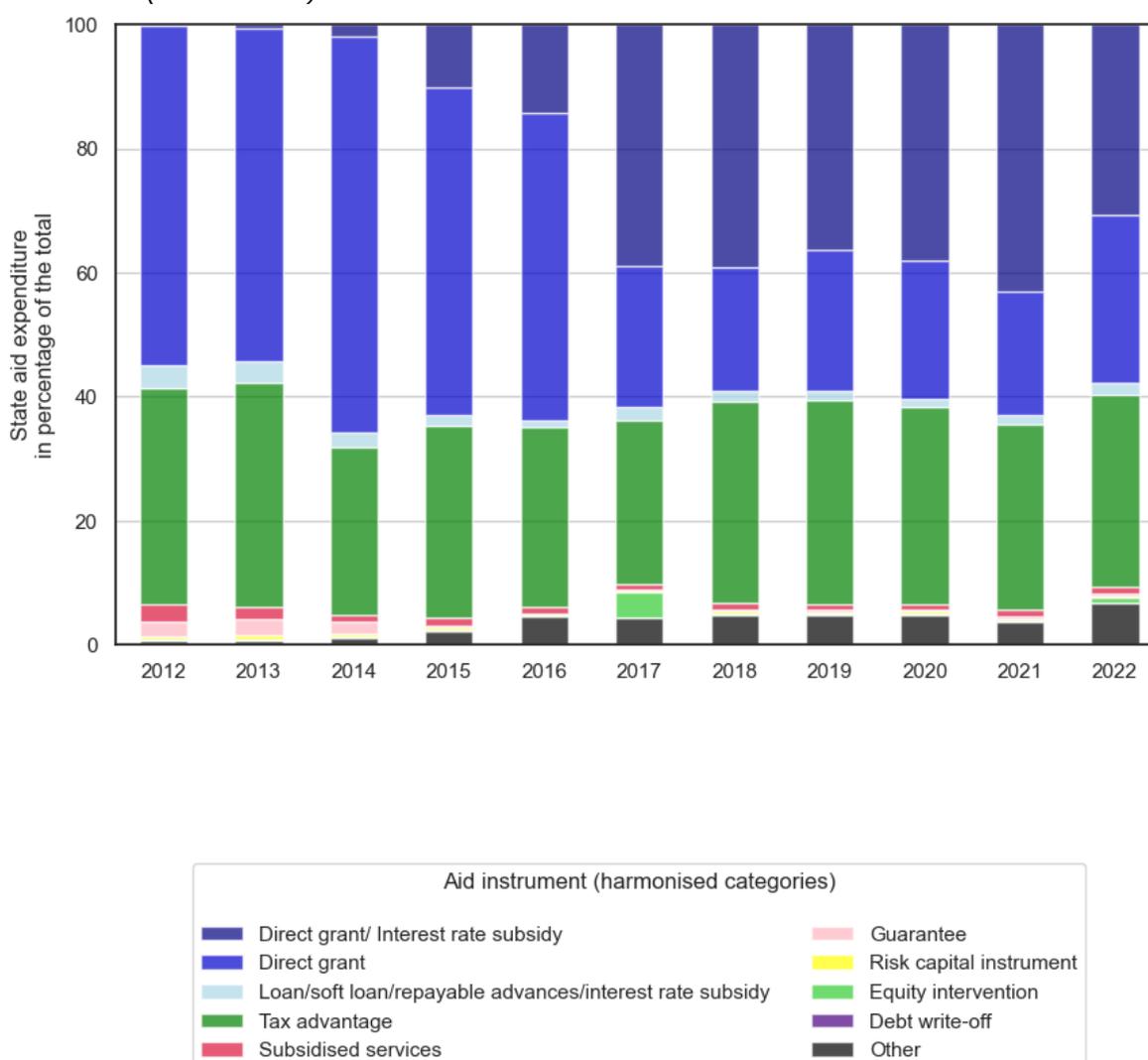
Figure 20: Share of State aid expenditure for non-crisis State aid measures, by Member State in 2022 (in % of total)



4.2 State aid expenditure for non-crisis measures by type of instrument: different practices across Member States

Comparing the evolution of expenditure for non-crisis objectives by type of aid instrument from 2012 to 2022 (see Figure 21), **direct grants**⁴⁹ are by far the most popular aid instrument both over the last decade and in 2022, representing **60.7% of total expenditure** in the period 2012-2022. Direct grants even grew increasingly popular over time, from 54.9% in 2012 to 57.8% in 2022. **Tax advantage measures** are the second most used instrument in the last decade with an average share of 30.3%, and a slightly higher share of 30.9% in 2022. Since 2012, the share of spending in the form of **subsidised services** has decreased (from 2.8% of the total in 2012 to 1.2% in 2022), as well as the share of spending in the form of **guarantees** (from 2.5% of the total in 2012 to 0.3% in 2022). The use of **other** State aid instruments has increased (the residual category 'other' represents 6.8% of total spending in 2022). **Equity interventions** have been used for large amounts exclusively in 2017.

Figure 21: Share of total State Aid for non-crisis State aid measures, by type of instrument, from 2012 to 2022 (in % of total)



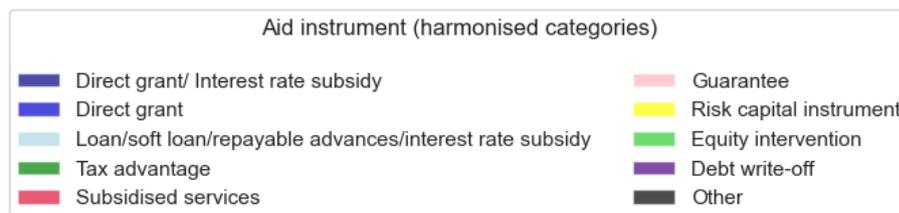
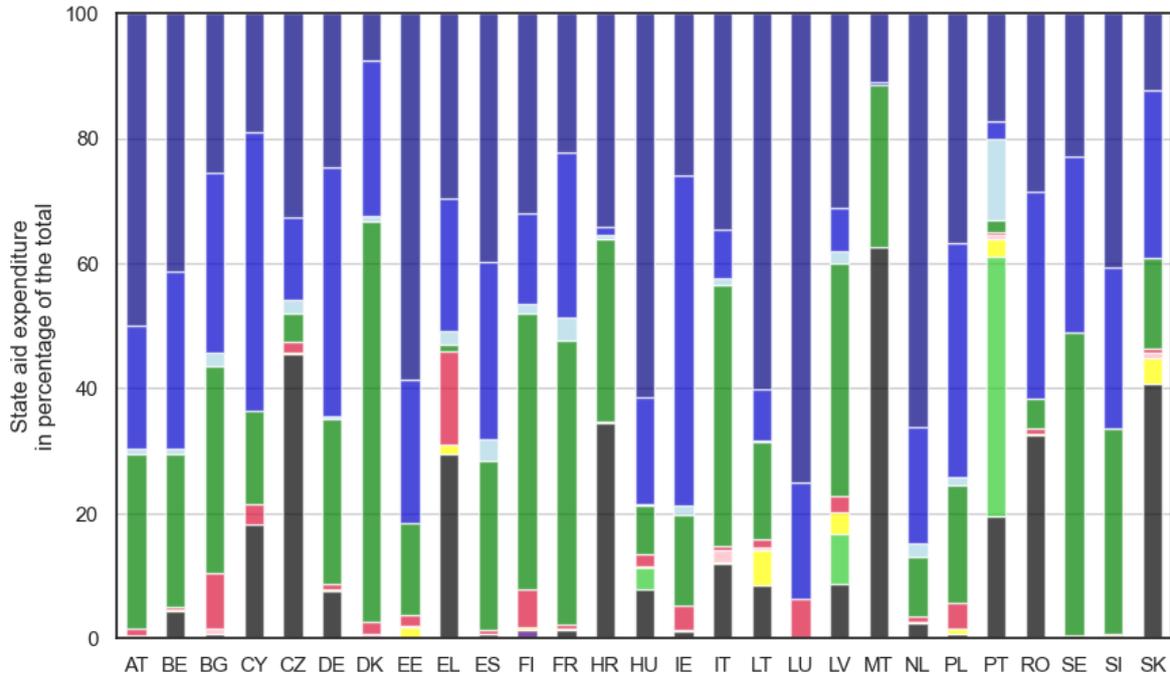
Looking at the different practices across Member States in 2022: direct grants⁵⁰ cover less than 50% of State aid expenditure in 10 Member States (Malta, Portugal, Denmark, Croatia, Latvia, Slovakia, Italy, Czechia, Finland, and France), see Figure 22. Tax advantage measures accounted

⁴⁹ Including the mixed category direct grants/interest rate subsidies.

⁵⁰ Ibid.

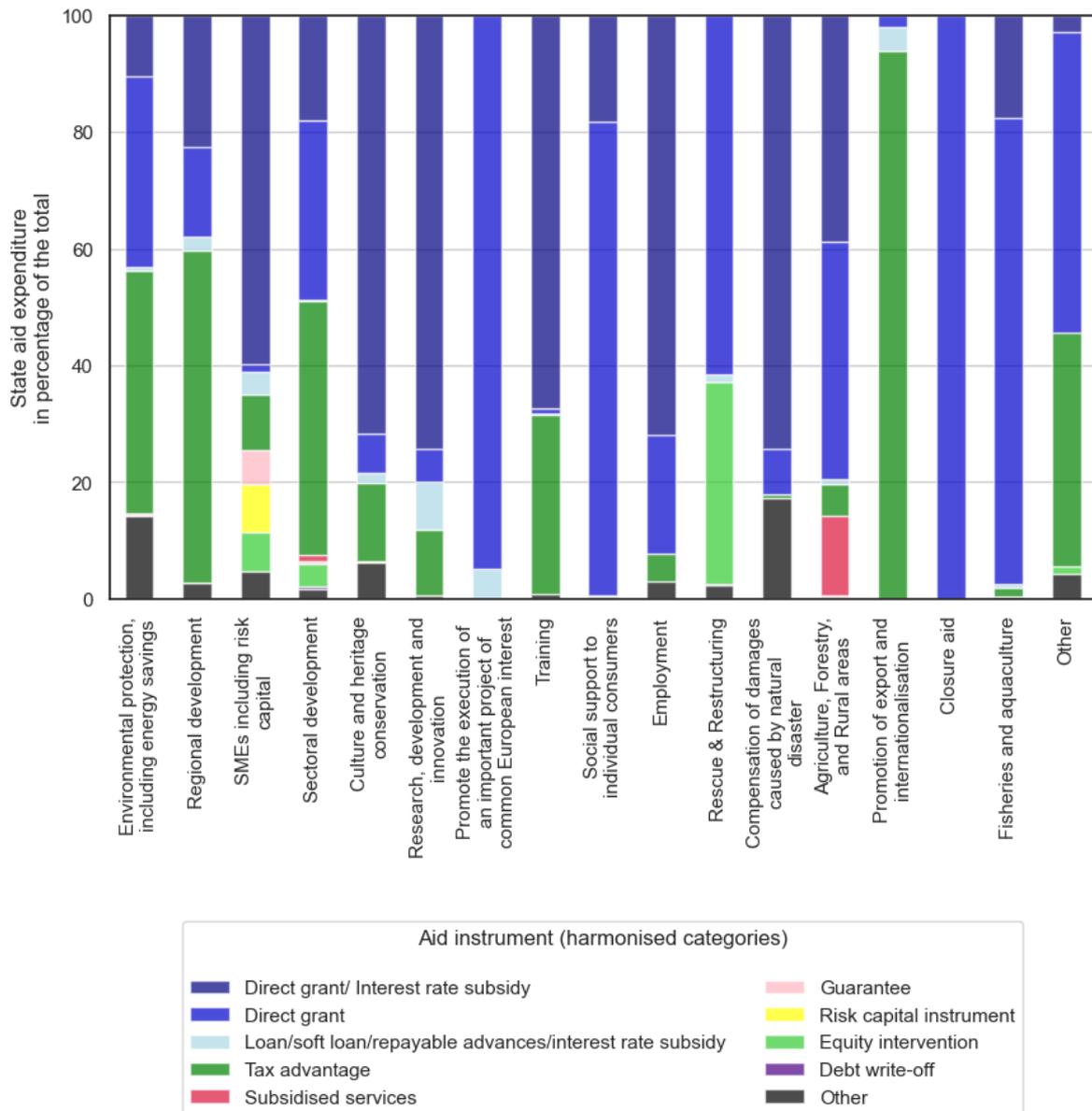
for 64% of Denmark’s State aid expenditure for non-crisis objective in 2022. Sweden (48.6%), France (45.6%), Finland (44.1%), Italy (41.7%), Latvia (37.3%) and Bulgaria (33.3%) granted more than one third of their spending in the form of tax measures. Portugal made a substantial use of equity interventions (41.5%). Malta reported 62.7% of its spending in 2022 under the residual category “other”, Czechia the 45.6%, Slovakia the 40.6%, Croatia and Romania the 34.4% and 32.5%, respectively. Greece reported a substantial use of subsidised services (15%).

Figure 22: Share of total State aid expenditure for non-crisis State aid measures by Member State and by type of instruments in 2022 (in % of total)



Looking at the use of aid instrument by policy objective (Figure 23), direct grants (including interest rate subsidies) is by far the most widely used type of instrument across all objectives, with the exception of promotion of export and internationalisation for which represent around 2% and is mainly channelled through tax advantages (94%). Tax advantage measures are mainly used also for regional development (56.8%), sectoral development (43.5%) and environmental protection including energy savings (41.4%), training to a lesser extent (30.8%).

Figure 23: Share of total State aid expenditure for non-crisis State aid measures, by main policy objectives and by type of instrument, in 2022 (in % of total)



4.3 State aid expenditure on co-financed projects

Figure 24 compares how much State aid expenditure for non-crisis objectives that was co-financed in 2022 across Member States. The figures are presented as a share of national GDP. The Member States that spent the most on co-financed projects in 2022 are: Lithuania (0.41% of national GDP), followed by Croatia (0.29%), Portugal (0.26%), Latvia and Hungary (0.22%), and Czechia (0.21%). Member States which appear spending relatively less in 2022 can spend their available funds in the following years of the Multiannual Financial Framework⁵¹.

⁵¹ [Open Data Portal for the European Structural Investment Funds - European Commission | Data | European Structural and Investment Funds \(europa.eu\)](https://open-data-portal.ec.europa.eu/data/european-structural-investment-funds)

Figure 24: State aid expenditure for non-crisis State aid co-financed projects in 2022, in percentage of GDP

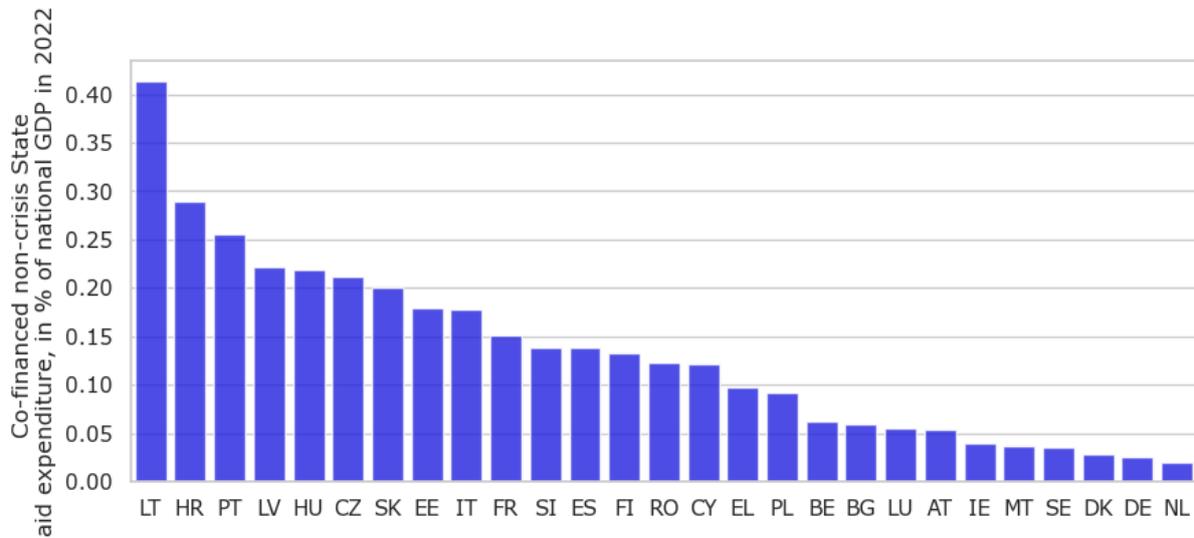


Figure 25: State aid expenditure on co-financed projects from 2012 to 2022, in EUR billion, current prices

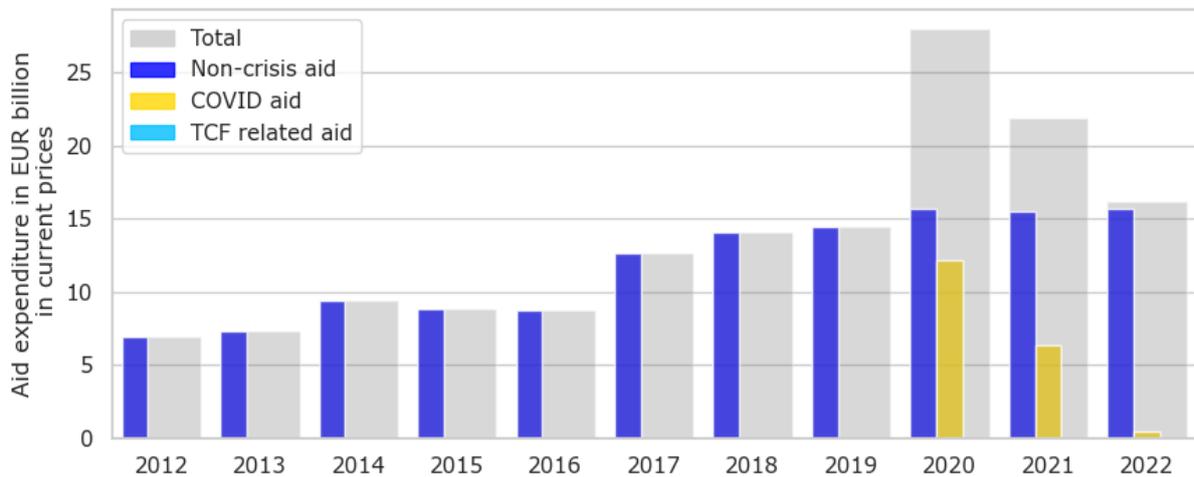


Figure 26: State aid expenditure on co-financed projects from 2012 to 2022, in EUR billion, constant prices

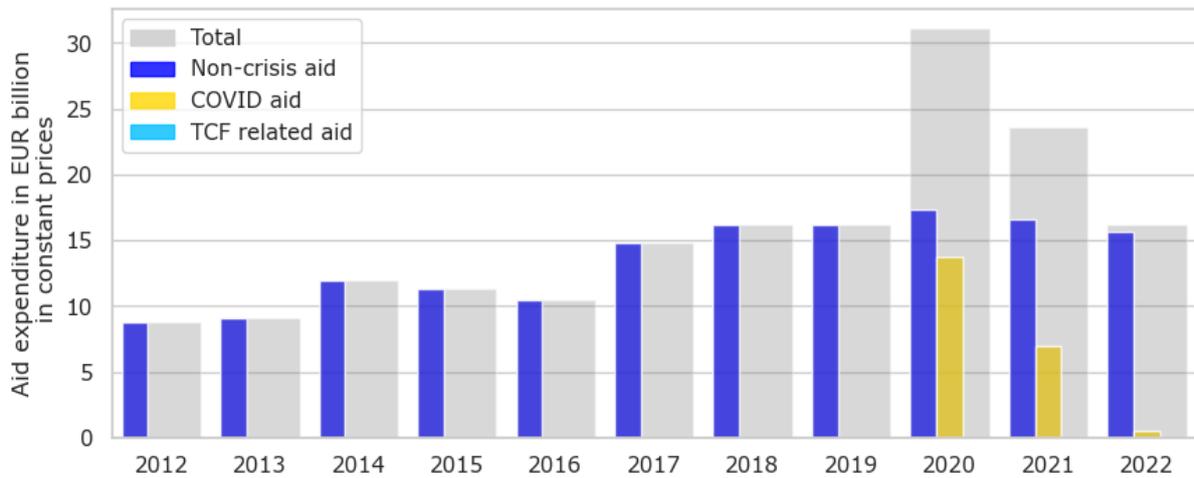


Figure 25 shows the evolution of spending on co-financed projects per Member State from 2012 to 2022 in absolute values. Compared to 2021, **total spending on non-crisis co-financed projects is stable** (blue bar), from about EUR 15.51 in 2021 billion to about EUR 15.71 billion in 2022. This corresponds to a small 1.3% increase in nominal terms, which turns into a -5.2% decrease when adjusting for the inflation (Figure 26). Regarding co-financed State aid expenditure in the context of the pandemic (yellow bar), it drastically decreased from around EUR 7 billion in 2021 (adjusted for inflation) to around EUR 463 million in 2022. Co-financed State aid expenditure for measures related to the Russian invasion of Ukraine is very limited (approximately EUR 13 million).

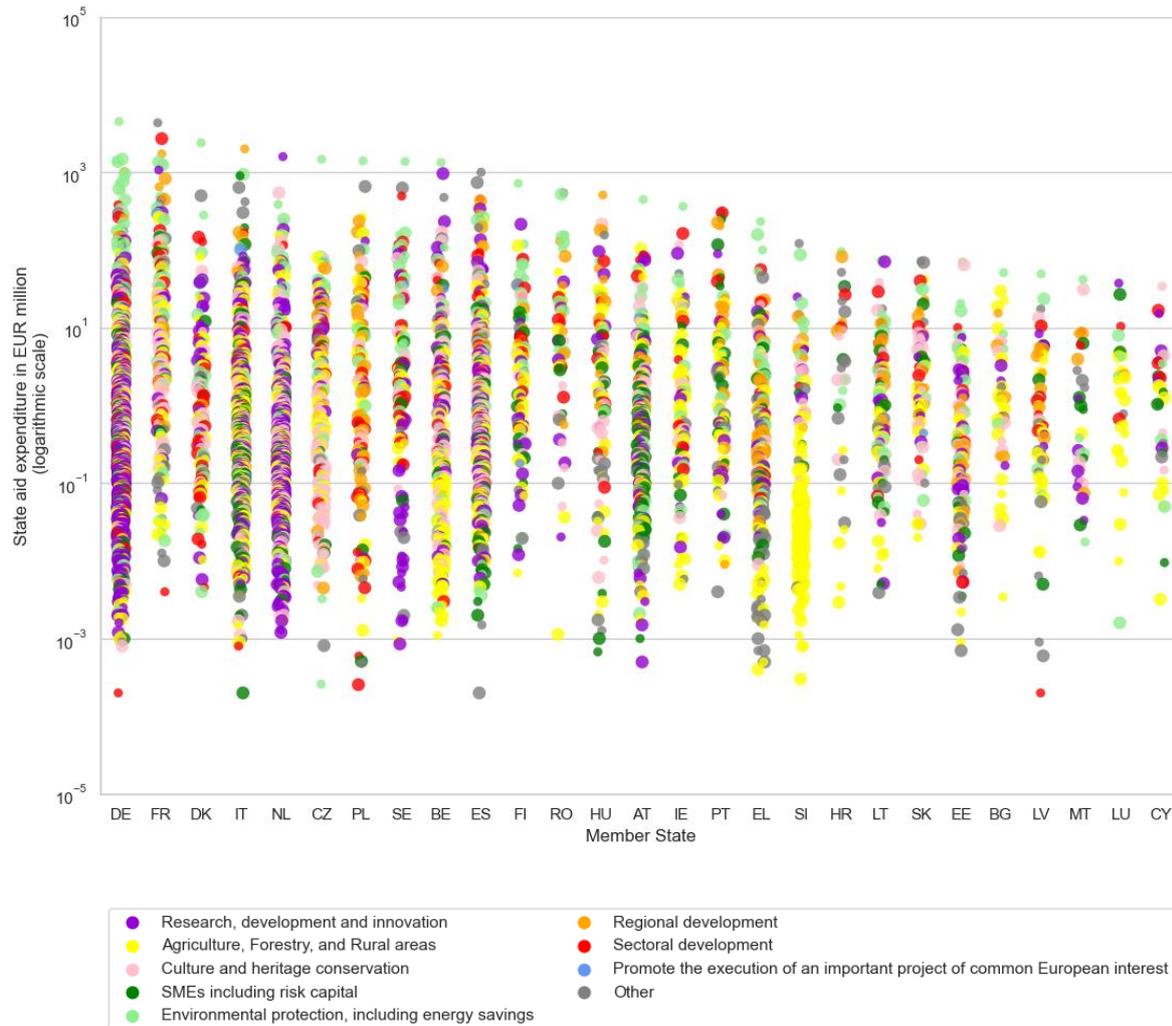
4.4 State aid schemes are highly heterogeneous: focus on the largest State aid schemes for non-crisis objectives in 2022

The State aid measures currently in force are very heterogeneous in terms of expenditure size. For this reason, the 2023 Scoreboard pays particular attention to the largest State Aid schemes in terms of expenditure and displays data at the level of individual measures.

Figure 27 presents expenditure under State aid schemes in 2022⁵², sorted by Member State (in the x-axis) and policy objective (different colours associated to different policy objectives).

⁵² Excluding aid to railways.

Figure 27: State aid schemes for non-COVID-19 objectives, by Member State and policy objective, (in EUR million – logarithmic scale)



N.B. Each point represents a State aid scheme and appears at the intersection of its category on the x-axis (the Member State concerned) and its expenditure on the y-axis. The expenditure is displayed with a logarithmic scale⁵³: the upper grey line represents 10 times more expenditure than the lower white line. In practice, aid measures can target several objectives, and therefore some objectives may overlap⁵⁴.

4.5 State aid expenditure to agriculture and fisheries

In 2022, EU27 Member States provided a total **EUR 7.72 billion for non-crisis State aid to agriculture, forestry, and rural areas** corresponding to **0.05% of EU GDP**.

In relative terms, the map and graph below (Figure 28 and Figure 29) display the State aid expenditure for agriculture, forestry and rural areas by Member State. In 2022, Czechia is the Member States that has spent the most on measures addressing the agriculture sector, namely

⁵³ A logarithmic scale allows to compare the order of magnitudes when there is a large heterogeneity in a variable, in our case in the expenditure. Using a logarithmic scale is useful to compress the scale and make the data easier to comprehend.

⁵⁴ For instance, following the liberalization of a sectoral market, a measure compensating a privatized company for the high labour cost of its workforce still employed under civil servants' contracts can be classified either under the objective 'sectoral development' or 'Social support to individual consumers'.

0.17% of national GDP. It is followed by Bulgaria and Poland, which are both above 0.11% of domestic GDP and by Hungary (0.09%) and Finland (0.08%).

Figure 28: State aid expenditure in agriculture, forestry, and rural areas by Member State, as % of national GDP in 2022

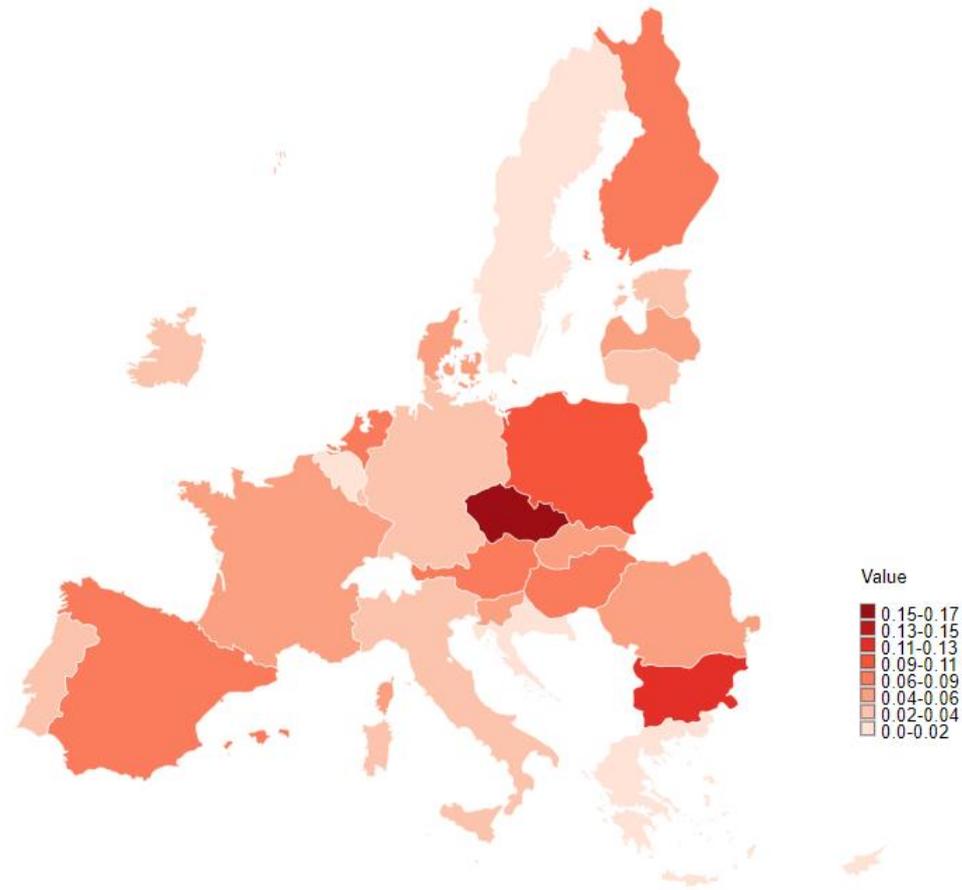


Figure 29: State aid expenditure in agriculture, forestry, and rural areas by Member State, as % of national GDP in 2022

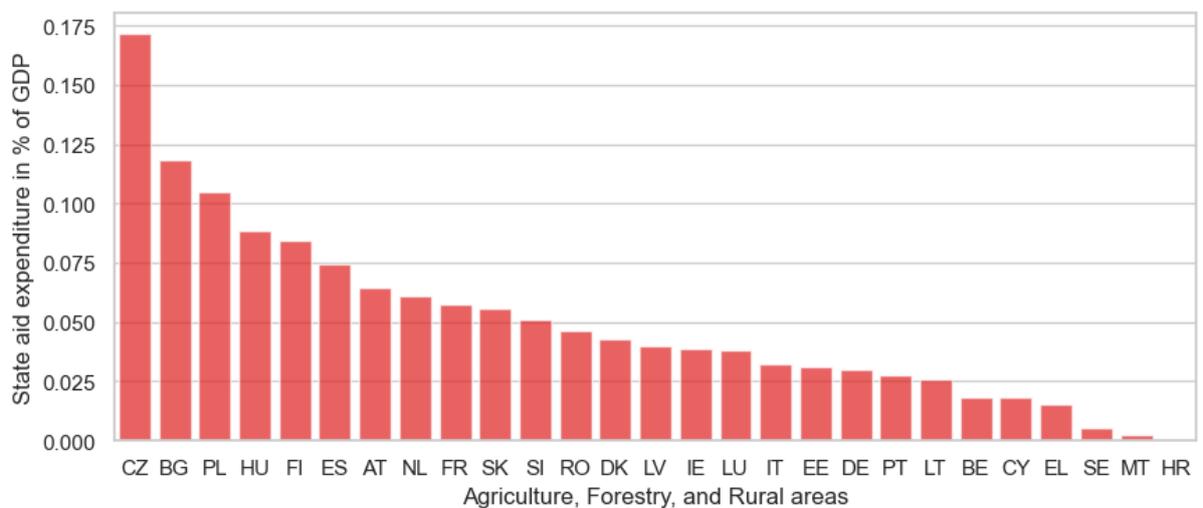
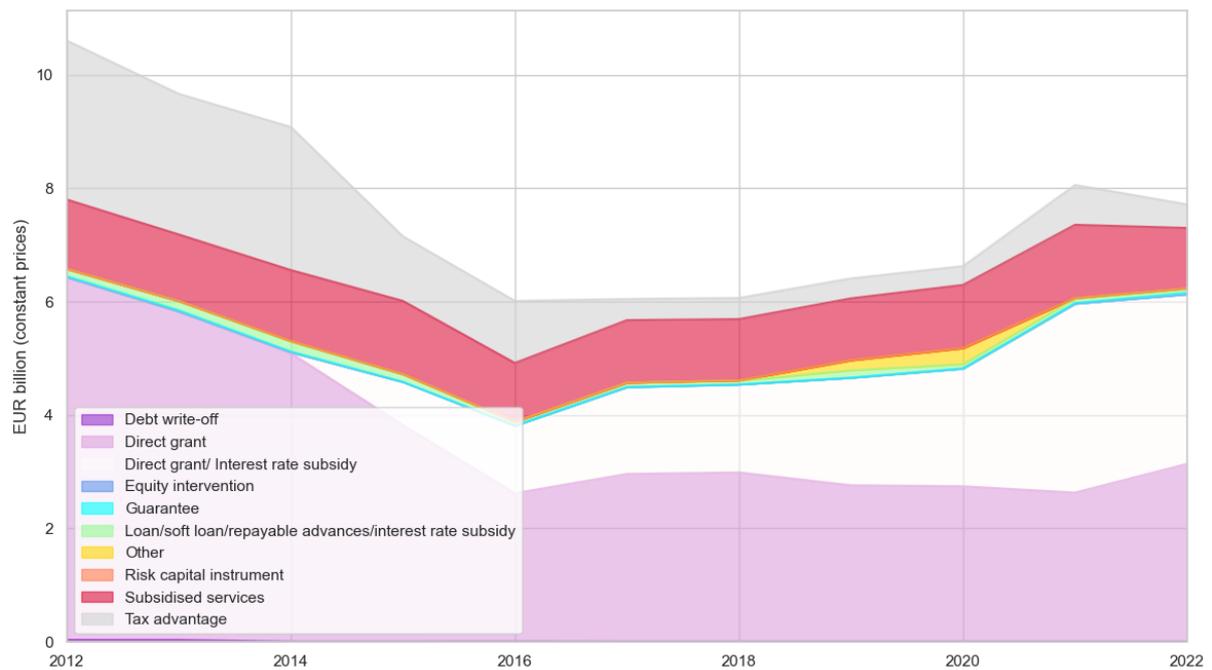


Figure 30 displays the overall State aid expenditure to agriculture, forestry, and rural areas, by type of aid instrument over the period 2012-2022, in constant prices. As shown in the figure, State

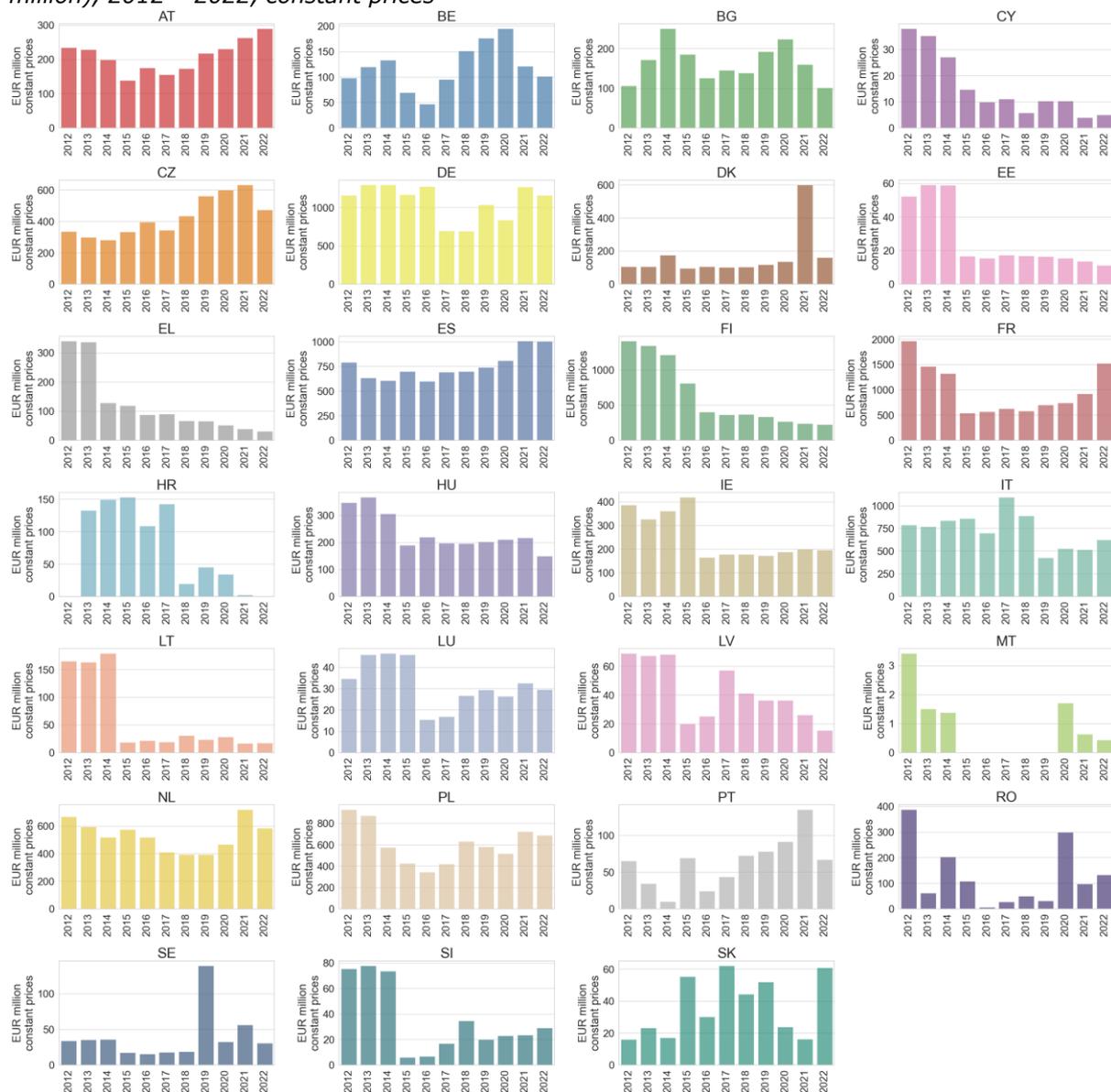
aid to agriculture, forestry, and rural areas has almost halved in the period 2012-2016, from EUR 10.61 billion in 2012 to EUR 6.01 billion in 2016⁵⁵. After 2016, expenditure has slightly increased, reaching EUR 6.23 billion in 2020. In 2021, the expenditure increased by 22% (+EUR 1.43 billion) since the previous year, the largest increase observed in the last ten years. In 2022, non-crisis aid to agriculture, forestry and rural areas has decreased by around 4%. Concerning the instruments, the **most widely used aid tool** in State aid expenditure in the agricultural sector in 2022 are **direct grants**, followed by subsidised services, tax advantage measures and soft loans. Tax advantage measures have lost relevance over the last decade in the agricultural sector. Compared to 2012, this instrument has decreased more than six-fold.

Figure 30: Total non-crisis State aid to agriculture, forestry, and rural areas by aid instrument (in EUR million), 2012 – 2022, constant prices



⁵⁵ Constant prices.

Figure 31: Total subsidies to agriculture, forestry and rural areas, EU27 Member States (in EUR million), 2012 – 2022, constant prices



Regarding **Member States’ State Aid expenditure in the agricultural sector** (Figure 31): in absolute values, the **largest spender** in the agricultural sector in **2022** was **France** with EUR 1.52 billion, followed by **Germany** (EUR 1.16 billion), **Spain** (EUR 1 billion), **Poland** (EUR 688 million) and **Italy** (EUR 624 million). The **biggest expenditure growth** in comparison to 2021 can be observed for **Slovakia**, which reports an almost five-fold increase in its State aid to agriculture expenditure after adjusting for inflation. France and Romania also have significantly increased their expenditure, although to a much lower extent (around +65% and +36% increase respectively). Cyprus, Slovenia, Italy and Austria increased their expenditure between 30% and 10%. Croatia experienced a -85% State Aid expenditure reduction since 2021. Similarly, Denmark experienced a -73% reduction, while Sweden and Latvia experienced a -45% and -41% reduction, respectively.

Member States’ State Aid expenditure in the **fishery and aquaculture sector** amounted to **EUR 107.2 million** in 2022 (Figure 32), a 56% increase compared to the last year (EUR 68.64 million in 2021 in constant prices). The four biggest spenders, namely **France, Ireland, Czechia,** and **Italy** made up for approximately 80% of the total expenditure in 2022.

Figure 32: Total State aid to fisheries and aquaculture by year for EU27 Member States (in EUR million), 2012-2022, in constant prices

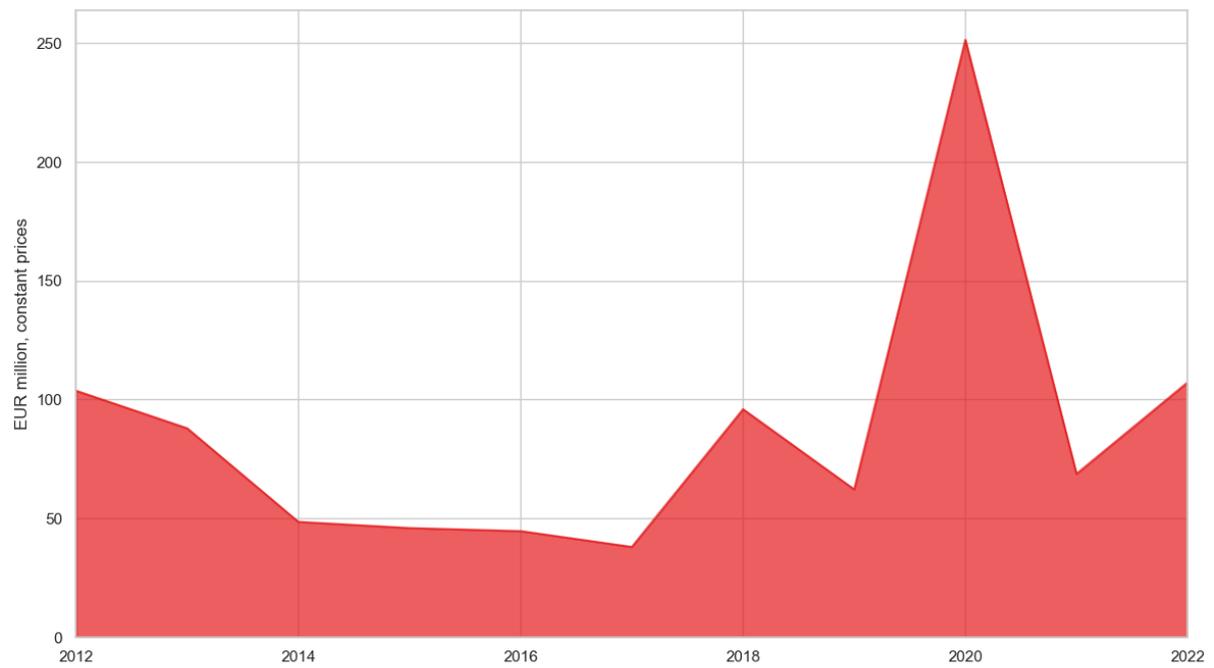
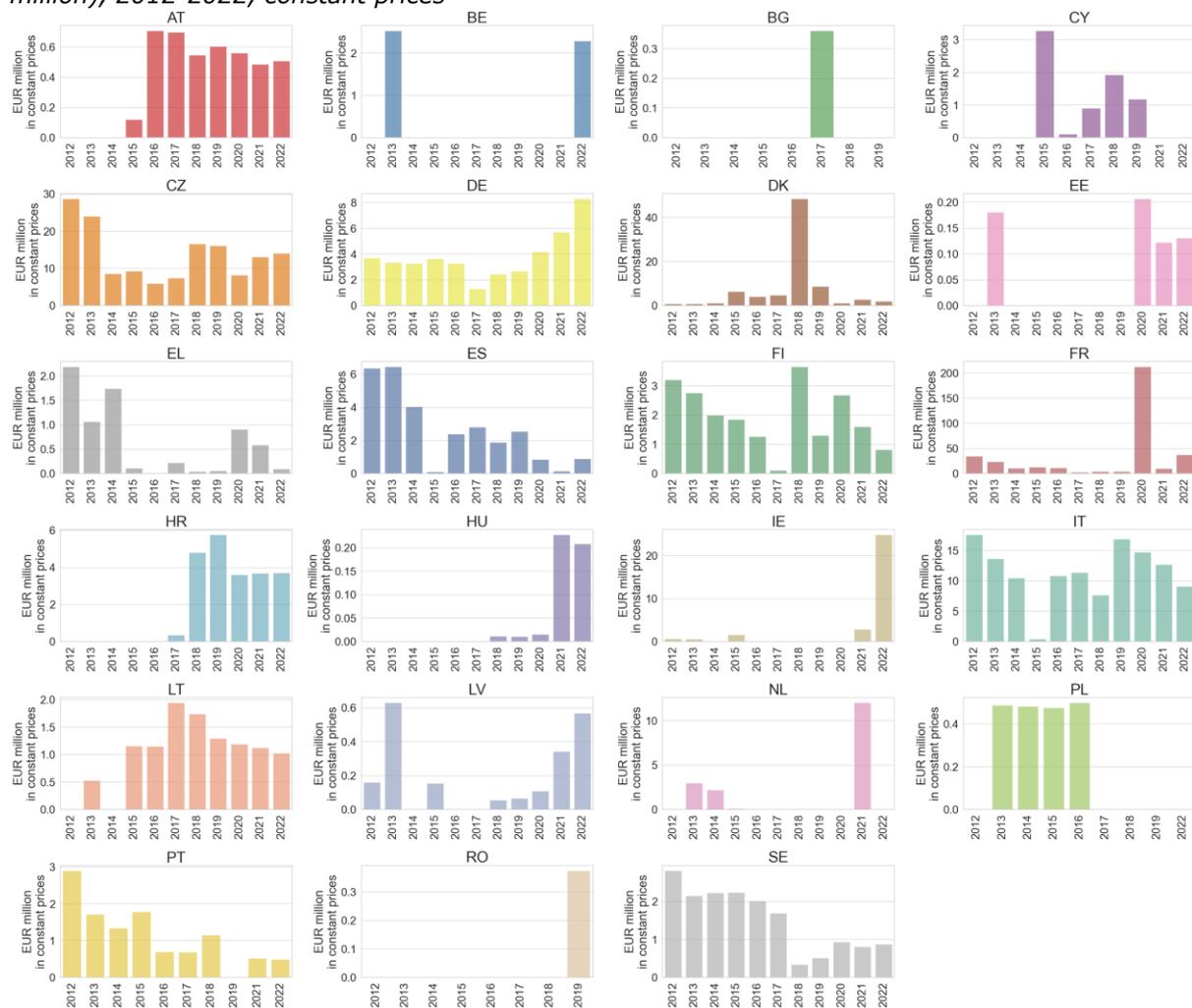


Figure 33 shows the evolution of the fishery and aquaculture sector spending in the last decade, by Member State. Bulgaria, Cyprus, the Netherlands, Poland, and Romania did not report any expenditure for 2022. Luxembourg, Malta, Slovenia and Slovakia did not report any expenditure for fisheries in the last decade.

Figure 33: Total State aid to fisheries and aquaculture by year for EU 27 Member States (in EUR million), 2012-2022, constant prices



N.B. The Member States who did not report any State aid expenditure to fisheries and aquaculture over the 2011-2021 period are excluded from this figure: Luxembourg, Malta, Slovenia and Slovakia.

4.6 Compensation and aid granted to the rail sector

Subsidies to railways are excluded from the total State aid amount in the Scoreboard, as they fall under Article 93 TFEU and corresponding regulations. This section reports figures regarding compensation and aid granted to the rail sector reported by Member States in accordance with Articles 5 to 7 of Commission Regulation (EC) No 794/2004⁵⁶, as amended by Commission Regulation (EU) 2015/2282⁵⁷, Regulation 1370/2007⁵⁸ of the European Parliament and of the

⁵⁶ Commission Regulation (EC) No 794/2004 of 21 April 2004 implementing Council Regulation (EC) No 659/1999 laying down detailed rules for the application of Article 93 of the EC Treaty (OJ L 140, 10.4.2004, p. 1)

⁵⁷ Commission Regulation (EU) 2015/2282 of 27 November 2015 amending Regulation (EC) No 794/2004 as regards the notification forms and information sheets (OJ L 325, 10.12.2015, p.1-180)

⁵⁸ Regulation (EC) No 1370/2007 of the European Parliament and of the Council of 23 October 2007 on public passenger transport services by rail and by road (OJ L 315, 3.12.2007, p. 1-13)

Council and Commission Directive 2006/111/EC⁵⁹. These figures include also the amounts provided to the rail sector in the COVID-19 crisis.

Figure 34: Total subsidies to the railway sector, 2012 – 2022, in EUR billion current prices⁶⁰

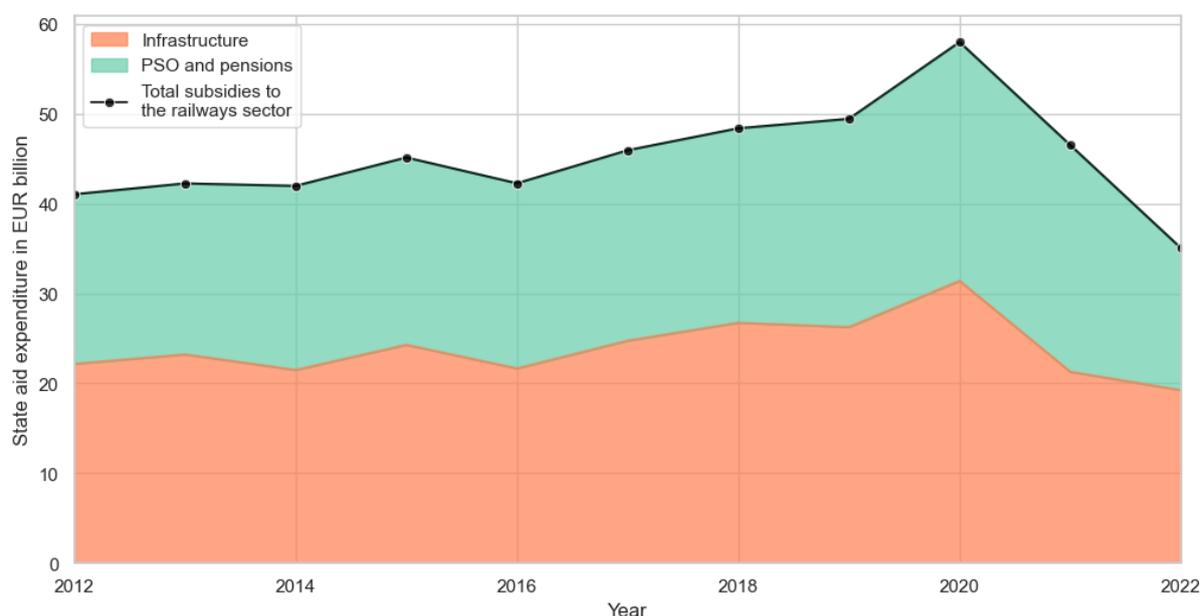


Figure 34 shows the evolution of the overall expenditure across the EU, from 2012 to 2022 in absolute values. **The trend of subsidies to the rail sector shows a slight increase since 2016, with a steep increase in 2020 of +17.3% in nominal values**, when the need to compensate providers of rail services for the damage suffered due to the COVID-19 outbreak and the ensuing containment measures was more acute. **Total subsidies to the rail sector had a significant drop in 2021 (-19.8% compared to the previous year), followed by an even more steep reduction in 2022 (-24.6%)** that brought the total compensation and aid granted to the **rail sector to EUR 35.06 billion**, from EUR 46.48 billion in 2021. The observed decrease in 2021 when containment measures on transport by rail were generally less tight and then in 2022, removed. Figures are broken down into public passenger rail transport services (PSO) under Regulation 1370/2007 (green area) and infrastructure and other aid (orange area). While infrastructure and other aid represented slightly more than half of all subsidies to railways until 2020 (53.5% on average), in 2021 we observe an increase of the public passenger rail transport services (PSO) and pensions, with this category accounting for 54.2% of the total rail subsidies while aid to infrastructure and other aid decreased to 45.8%. In 2022, infrastructure and other aid represented again the majority of the aid expenditure with around 54.8% of the expenditure.

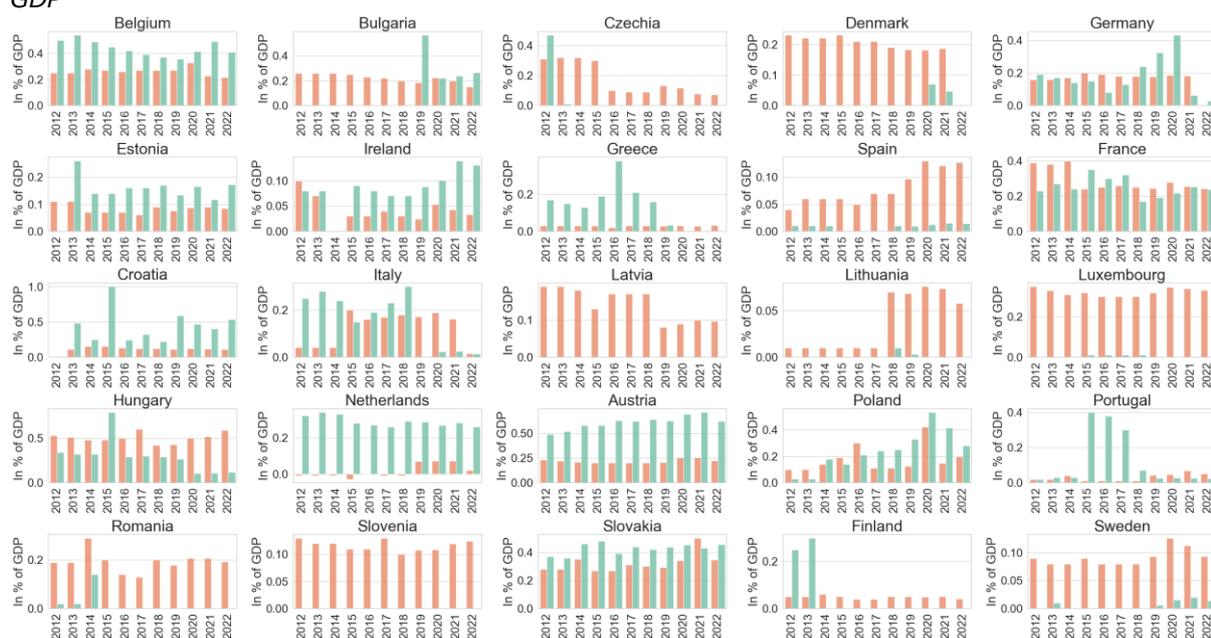
Looking at the distribution of rail sector subsidies as a share of national GDP across Member States (Figure 35), Austria, Slovakia, Hungary, Croatia and Belgium are the Member State spending relatively most in 2022, followed by France, Poland, Bulgaria, Luxembourg, the Netherlands and Estonia which have spent above the EU 27 average (0.22% of EU27 GDP). Denmark is the Member State that have spent relatively least. Cyprus and Malta report no expenditures.

Several Member States may not report spending on infrastructure and other aid, considering that the measures at stake do not constitute aid in case they benefit all operators of the railways network.

⁵⁹ Commission Directive 2006/111/EC of 16 November 2006 on the transparency of financial relations between Member States and public undertakings as well as on financial transparency within certain undertakings (OJ L 318, 17.11.2006, p. 17–25)

⁶⁰ The aid expenditure to railway by France has been estimated based on the previous report submitted in the reporting exercise 2022.

Figure 35: Total subsidies to the railway sector by Member State, 2012 – 2022, as % of national GDP⁶¹



4.7 State aid to financial institutions

The 2023 Scoreboard presents State aid to financial institutions in the period 2013-2022, by aid instrument. The data includes both the amounts of aid that the Commission authorised based on notifications by the Member States ("State aid approved") and the amounts of aid actually disbursed by the Member States ("State aid used").

Since the outbreak of COVID-19, the war of aggression against Ukraine and the consequent adoption by the Commission of the corresponding Temporary Frameworks for State aid measures, the Member States have targeted their State aid at undertakings that could not cover their liquidity needs due to the pandemic or due to economic effects of the war of aggression against Ukraine. The banking sector has indirectly benefitted from this support to the real economy, showing increased resilience so far. This is evident in the declining amounts of aid to the financial sector for 2020 to 2022 in comparison to the previous years.

The level of State aid approved in the form of capital or capital-like instruments in 2022 continued to increase slightly since 2019 due to measures in Poland, more concretely the budget increase for a scheme, fully applicable from the end of 2020, and an individual recapitalisation as a result of bank resolution in 2022. As regards approved liquidity aid, the amount of aid in the form of guarantees fell to zero as a remaining scheme in Greece expired in 2021. Liquidity measures other than guarantees were approved for the first time since 2017 and they were also related to the bank resolution in Poland in 2022. Liquidity support under the Temporary Frameworks is not reflected here as the financial sector was excluded from these temporary state aid regimes.

The amount of State aid used by banks in 2022 has followed two different trends. On the one hand, the use of aid in the form of capital or capital-like instruments increased due the bank resolution measures in Poland. On the other hand, the use of guarantees and other liquidity measures continued its decreasing trend compared to the previous years due to the reduction of guaranteed instruments.

⁶¹ The aid expenditure to railway by France has been estimated based on the previous report submitted in the reporting exercise 2022.

Table 1: Total amounts of State aid to banks approved and used in the EU over the period 2013-2022

Total amounts of State aid to banks approved and used in the EU over the period 2013-2022										
Aid approved (EUR billion)										
Aid instrument	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
1. Recapitalisations	29.6	20.3	18.8	8.5	25.7	9.2	8.6	8.7	11.6	13.1
2. Impaired asset measures	14.7	3.5	1.0	0.0	0.0	3.5	0.0	0.3	0.0	0.0
Total of capital-like aid instruments (1+2)	44.3	23.9	19.8	8.5	25.7	12.7	8.6	9.0	11.6	13.1
3. Guarantees	76.0	38.7	165.4	310.7	328.5	153.3	176.0	49.0	30.0	0.0
4. Other liquidity measures	9.7	1.7	0.0	0.0	14.2	0.0	0.0	0.0	0.0	2.4
Total of liquidity aid instruments (3+4)	85.7	40.4	165.4	310.7	342.7	153.3	176.0	49.0	30.0	2.4
Aid used (EUR billion)										
Aid instrument	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
1. Recapitalisations	26.5	7.6	10.1	0.1	11.3	0.2	0.1	0.1	0.3	1.5
2. Impaired asset measures*	19.0	1.6	2.3	2.8	0.0	3.6	0.0	0.0	0.0	0.0
Total of capital-like aid instruments (1+2)	45.6	9.2	12.4	2.9	11.3	3.8	0.1	0.1	0.4	1.5
3. Guarantees	415.5	266.5	169.3	118.4	107.3	88.2	85.3	63.0	55.9	47.4
4. Other liquidity measures	39.2	37.5	22.0	12.4	10.9	6.7	4.4	4.2	3.8	3.8
Total of liquidity aid instruments (3+4)	454.7	304.0	191.3	130.8	118.2	94.9	89.7	67.3	59.7	51.2

* Bad banks initial assets transfers value

Disclaimer: The information on aid used might be subject to future revisions depending on new information that the Member States may make available.

Source: Commission services. For guarantees and other liquidity measures, the amounts represent outstanding aid in a given year (in nominal amount) and not only the new liquidity aid granted in that year.

4.8 State aid in the United Kingdom

Figure 36 shows the evolution of State aid expenditure in the United Kingdom over the last 10 years in current prices. The grey bar represents the amount of State aid spent for all kinds of policy objectives until 2020, the yellow bar the expenditure related to COVID-19 cases and the red bar the total expenditure for the types of measures that have to be reported to the European Commission as of 1 January 2021, when the withdrawal agreement became fully operational. This concerns expenditure under measures:

- i) affecting trade between Northern Ireland and the EU⁶², and
- ii) schemes where EU funds are involved⁶³

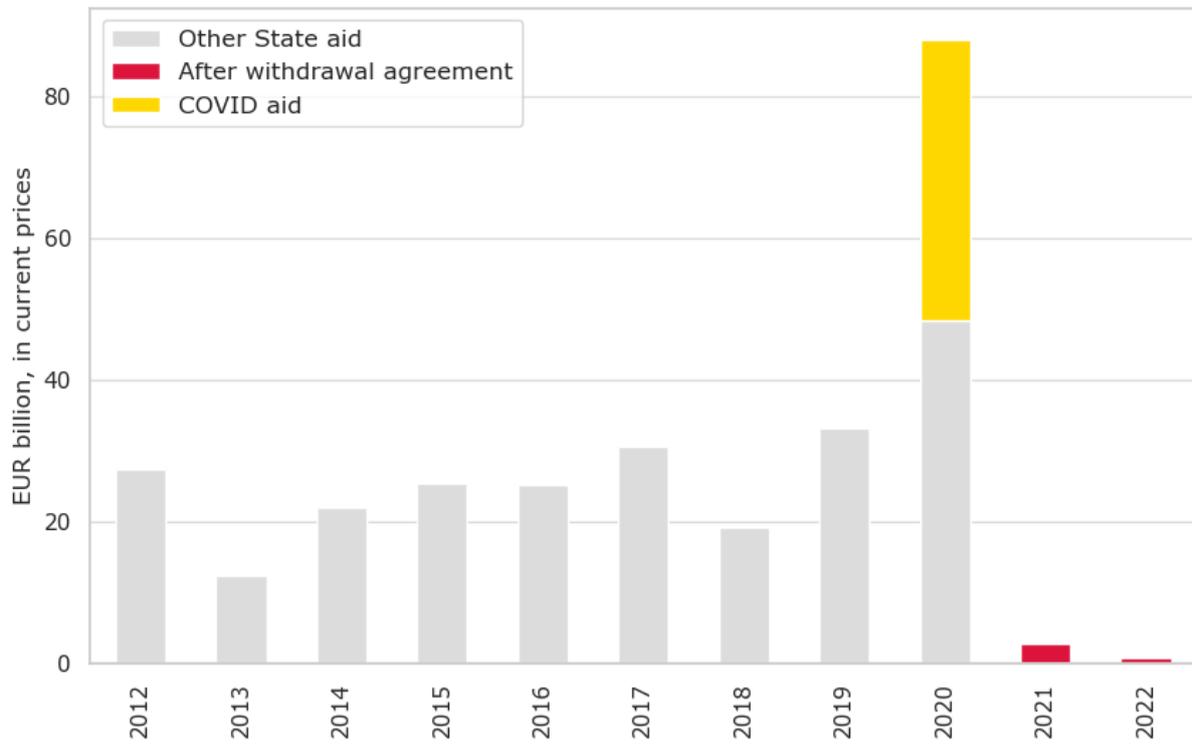
The State aid expenditure in the United Kingdom, excluding the aid related to the COVID-19 crisis, showed a strong variation in the last decade, reaching a peak in 2020 of EUR 48.48 billion (in current prices), when the United Kingdom disbursed also EUR 39.59 billion to remedy the serious disturbance in the economy provoked by the COVID-19 outbreak, leading to a total expenditure of EUR 88.07 billion.

The expenditures reported for the year 2021 and 2022 concern 15 not co-financed measures, affecting trade between Northern Ireland and the EU, as well as 53 active measures where EU funds are involved, of which 12 also relate to Northern Ireland. The total expenditures amount to EUR 2.7 billion in 2021 and EUR 857.4 million in 2022. Of those, EUR 2.45 billion and EUR 688.4 million were spent for co-financed projects in 2021 and 2022, respectively.

⁶² See Article 10 and Annex 5 of Protocol (No 15) On Certain Provisions Relating to The United Kingdom Of Great Britain And Northern Ireland (OJ C 202, 7.6.2016, p. 284–286).

⁶³ See Article 138 of Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community (OJ C 384I, 12.11.2019, p. 1–177).

Figure 36: Evolution of State Aid expenditure reported by the UK from 2012 to 2022, in EUR billion, in current prices



5 State aid expenditure for COVID-19 related measures

5.1 Overview

This section compares the **nominal amounts** of the aid granted to support undertakings in the COVID-19 crisis with the corresponding **aid elements**. As already specified in this note, while for some types of aid, such as direct grants, the nominal amount coincides with the aid element, for other instruments, notably for repayable instruments, there is a large discrepancy between the two metrics as the nominal amount represents the nominal value of the underlying credit contract (*e.g.* loan, guarantee), while the aid element quantifies the advantage to the beneficiary and the cost to government (*e.g.* the lower interest rate for a subsidised loan or the reduced guarantee fee). As such, differently from the nominal amounts, the aid element enables the correct comparison of aid granted via different instruments.

In absolute terms, looking at the **nominal amounts** of the COVID-19 State aid measures provided to undertakings in 2022 (Figure 37), **EU27 Member States provided EUR 121.06 billion**. Italy granted slightly more than a third (34.3%) of the total nominal amounts (EUR 41.58 billion), followed by Germany with 20.5% (EUR 24.86 billion), and France (15.4%, EUR 18.64 billion). Romania granted 7% of the total COVID-19 State aid (EUR 8.49 billion) and Spain the 4.3% (EUR 5.24 billion).

In relative terms and considering the nominal values of the aid (Figure 38), Romania is the country that has provided the most to the economy as compared to its own GDP in 2022 (2.97%), followed by Italy (2.13%), Hungary (1.8%), Austria (1.03%), Greece (0.9%), Malta (0.73%) and France (0.7%). Germany and Spain provided a lower relative amount of COVID-19 nominal aid, corresponding to around 0.64% and 0.39% respectively of their national 2022 GDP.

Figure 37: Total State Aid expenditure for COVID-19 measures by Member State in 2022 (nominal amounts, in EUR billion)

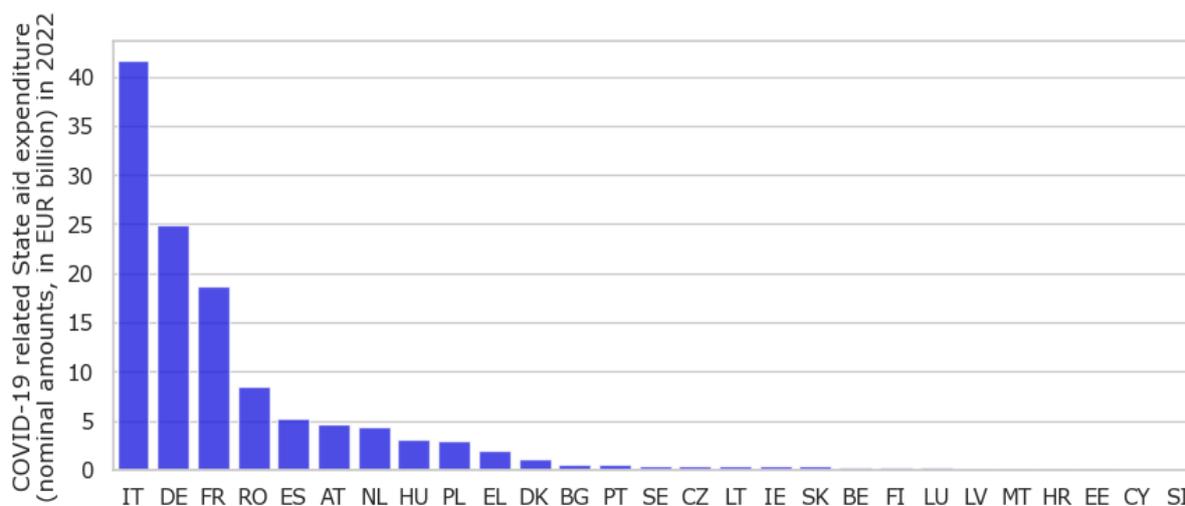
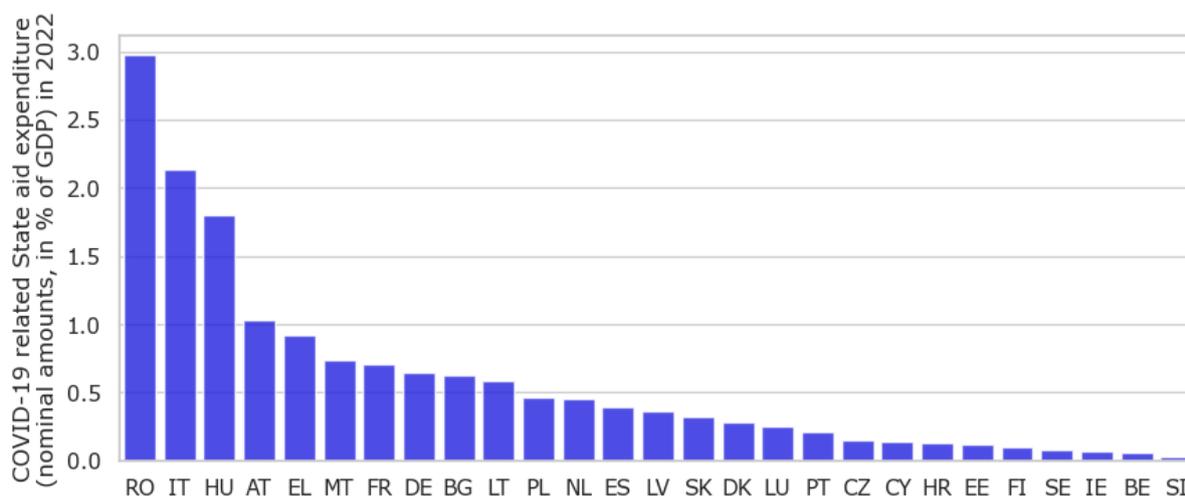


Figure 38: Total State Aid expenditure for COVID-19 measures by Member State in 2022 (nominal amounts, as a percentage of 2022 GDP)



Since the COVID-19 outbreak in early 2020, looking at the nominal amounts of the COVID-19 State aid measures provided to undertakings, **EU27 Member States provided a total of EUR 1.097 trillion**. More than half (56%) of this amount, EUR 614.42 billion (in constant prices) were provided in the first year of the pandemic in 2020. In 2021, the support in nominal amount almost halved, getting to EUR 361.54 billion (33% of the total State aid for COVID-19 measures in nominal amounts). It reduced almost threefold in 2022, when Member States provided EUR 121.06 billion in nominal amounts (11% of the total).

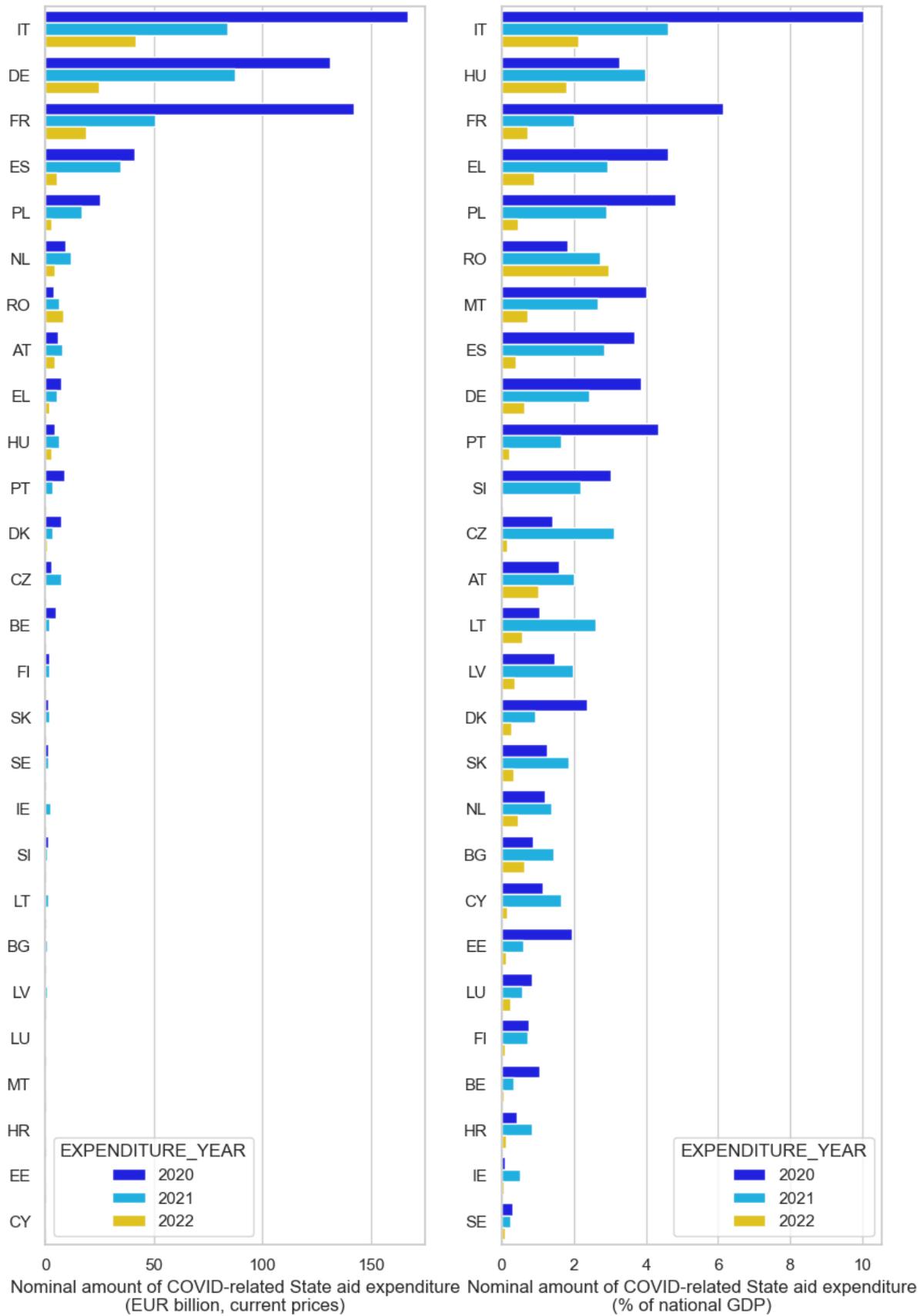
As shown in Figure 39, Italy is the Member State that has provided the largest support in nominal amounts (EUR 301.93 billion in constant prices, around 28% of the total). The largest part of this amount (EUR 173.46 billion, 57% of the total support provided by Italy) was provided in 2020, 29% (EUR 86.89 billion) was provided in 2021, and 14% (EUR 41.58 billion) in 2022. Germany is the second largest provider in nominal amounts, having provided around 24% of the total State aid for COVID-19 measures (EUR 263.3 billion). Similarly to Italy, Germany has provided the majority of the support in nominal amounts in 2020 (EUR 145.05 billion adjusted to the inflation, 55% of the total), reducing the amount to EUR 93.39 billion in 2021 (36% of the total) and finally to EUR 24.86 billion in 2022 (9% of the total).

France follows, having provided one fifth of the total State aid for COVID-19 measures in nominal amounts between 2020 and 2022 (EUR 219.81 billion, of which 68% - EUR 149.01 billion - in 2020, 24% - EUR 52.15 billion - in 2021, and 8% - EUR 18.64 billion - in 2022).

Also, in relative terms and still considering the nominal values of the aid (Figure 39), EU27 Member States provided around 4.25% of their GDP at the peak of the crisis in 2020, 2.33 % of their GDP in 2021, 0.76% of their GDP in 2022.

With an amount of aid corresponding to 10.05% of its GDP in 2020, 4.62% in 2021 and around 2.13% in 2022, Italy is the country that has provided the most to the economy as compared to its own GDP in the last three years for measures to remedy the serious disturbance of the economy caused by the COVID-19 outbreak. It is followed by Hungary (3.86% of its GDP in 2020, 3.99% in 2021 and 1.8% in 2022), and France (6.13% in 2020, 2.02% in 2021, 0.64% in 2022)

Figure 39: Total State Aid expenditure for COVID-19 measures by Member State in 2020, 2021 and 2022 (nominal amounts, in EUR billion and as a percentage of GDP)

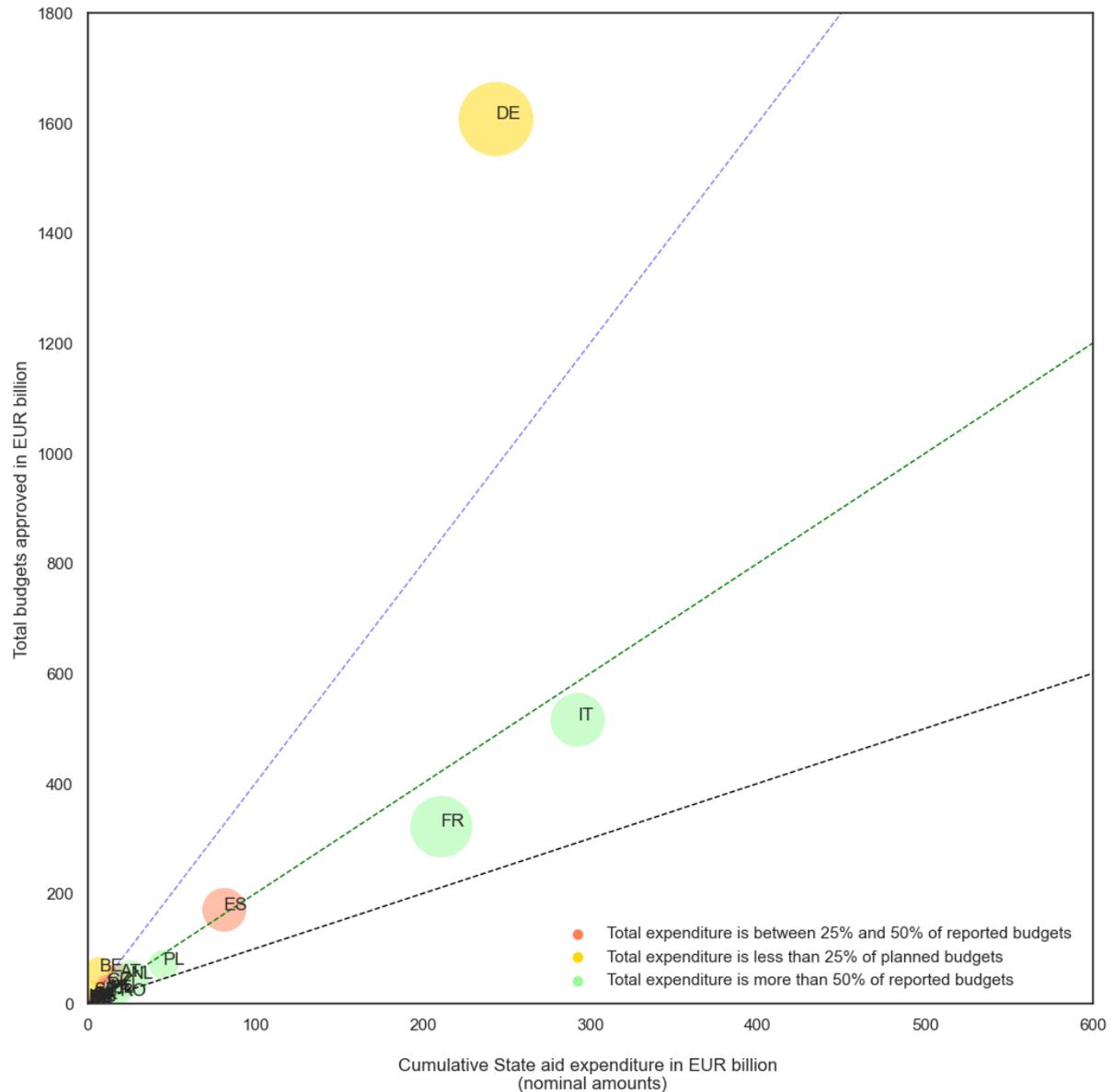


In the period between the adoption of the COVID-19 Temporary Framework on 19 March 2020 and December 2022, out of nearly EUR 3.05 trillion of aid approved, around one third (34%) of it (EUR 1.03 trillion in nominal amounts) was actually spent. . Thus, Member States have provided to their companies a relatively small percentage of the amounts approved by the Commission.

Only four Member States (Belgium, Croatia, Germany, and Sweden) have spent less than 25% of the approved budgets. 10 Member States⁶⁴ has spent between 25% and 50% of the approved budget.

The remaining 13 Member States⁶⁵ have spent more than 50% of the budgets approved by the end of 2022.

Figure 40: Relation between cumulative State Aid expenditure and the total budgets approved by Member State (nominal amounts in EUR billion)



⁶⁴ Austria, Cyprus, Czechia, Denmark, Estonia, Finland, Spain Luxembourg, Slovakia, Slovenia.

⁶⁵ Belgium, France, Greece, Hungary, Ireland, Italy, Lithuania, Latvia, Malta, the Netherlands, Poland, Portugal, Romania.

However, the picture changes when looking at the **aid element**, which is the correct metric to look at in order to compare the aid provided through different instruments, as it is the case with the COVID-19 related measures. **The total aid element provided by all EU27 Member States in 2022 amounts to EUR 76.65 billion.** In absolute terms, **Germany** is the country that has provided the most, with an amount of EUR 24.16 billion, corresponding to around 32% of the total aid expenditure for COVID-19 measures in 2022. **France** follows with EUR 18.64 billion (24% of the total), then **Italy**, which shows much lower amounts reported as aid elements (EUR 14.68 billion, 19% of the total at the EU27 level) compared to nominal amounts as channelled a great part of the aid through repayable instruments. Austria and the Netherlands spent EUR 4.6 billion and EUR 3.74 billion respectively for COVID-19 measures, corresponding to approximately 6% and 5% of the total expenditure for these measures in 2022.

The ranking of the Member States in terms of expenditure expressed as a percentage of the national GDP significantly changes when looking at the aid elements (Figure 42). **Austria and Greece are the Member States with the largest share of COVID-19 State aid expenditure relative to 2022 national GDP** (1.03% and 0.84% respectively), followed by Italy (0.75%), Malta (0.73%) and France (0.71%). The amount spent by Germany, the greatest in absolute amounts, corresponds to around 0.62% of the 2022 German GDP. On the other hand, Slovenia (0.03% of its own GDP), Belgium, Ireland and Sweden (around 0.04% of their own GDP) are the Member States that spent least in relative terms, closely followed by Estonia (0.05%).

Figure 41: Total State Aid expenditure for COVID-19 measures by Member State in 2022 (aid elements, in EUR billion)

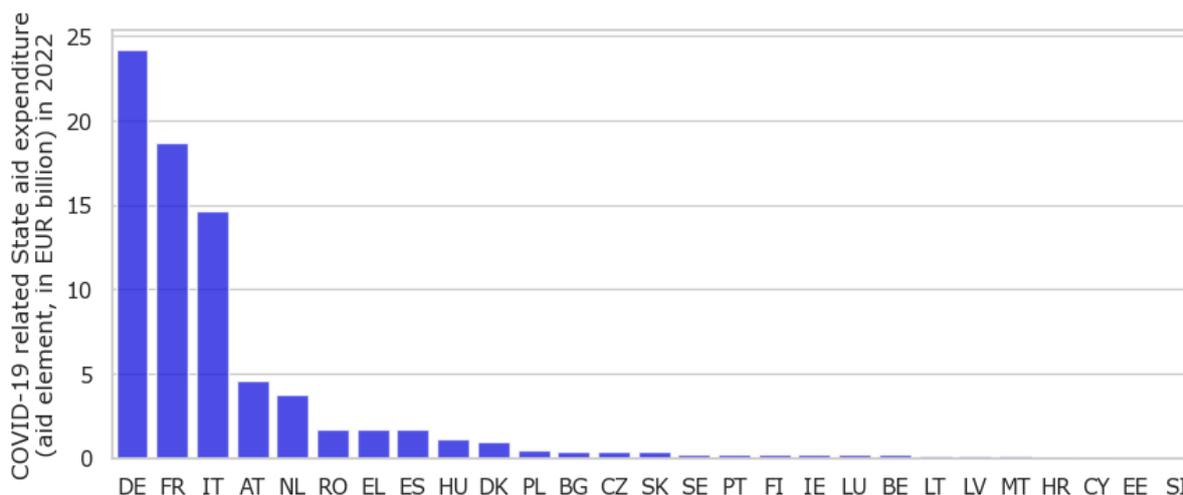
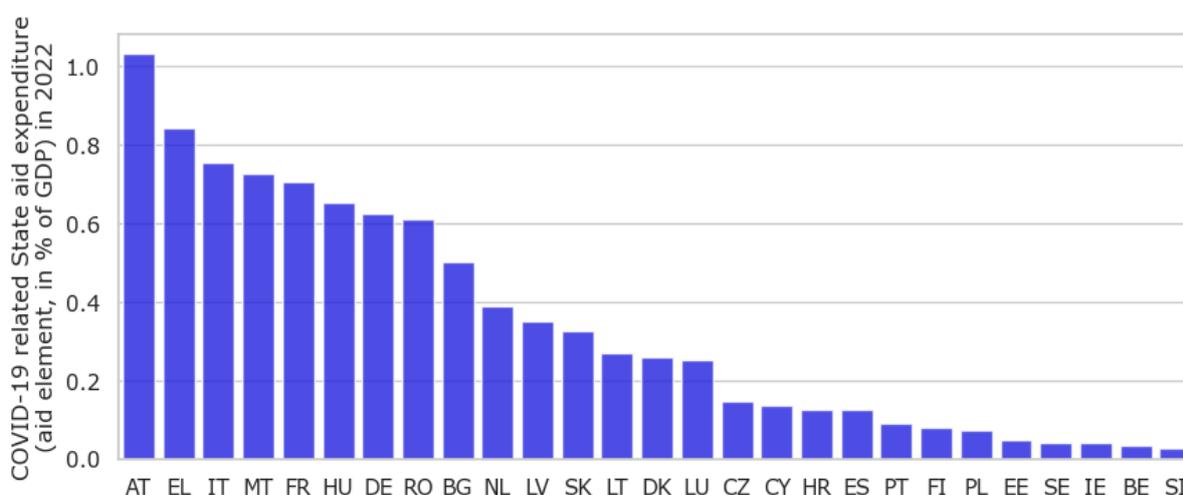


Figure 42: Total State Aid expenditure for COVID-19 measures by Member State in 2022 (aid elements, as a percentage of 2022 GDP)



During the period 2020-2022, considering the aid elements of the COVID-19 State aid measures, **EU27 Member States spent a total of EUR 471.96 billion to remedy the serious disturbance of the economy caused by the COVID-19 outbreak.** The greatest part of the support was provided in the first two years, as 43% of the total amount, approximately EUR 201.14 billion (in constant prices) was provided in the first year of the pandemic, and 41% of the total aid expenditure was realised in 2021 (EUR 194.17 billion). In 2022, the COVID-19 related support more than halved, getting to EUR 76.65 billion (16% of the total State aid for COVID-19 measures in aid elements provided in the last three years).

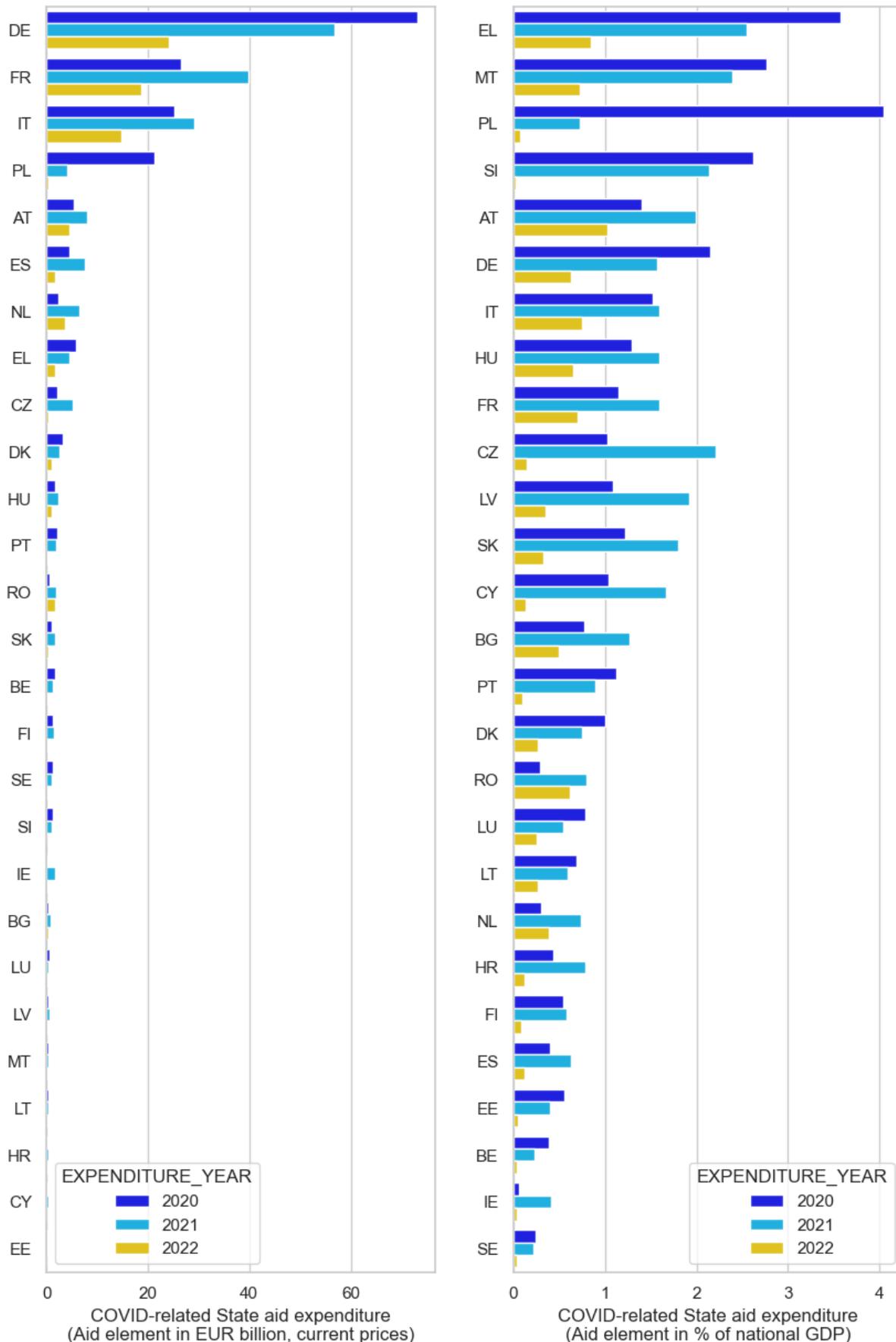
As shown in Figure 43, Germany is the Member State that has provided the largest support in aid elements (EUR 165.45 billion in constant prices, around 35% of the total State aid expenditure for COVID-19 measures between 2020 and 2022). Almost half (49%) of the support provided by Germany to remedy serious disturbance of the economy caused by the COVID-19 outbreak in the last three years, was spent in the first year of the pandemic (EUR 80.79 billion), 36% (EUR 60.5 billion) was provided in 2021, and 15% (EUR 24.16 billion) in 2022. France is the second largest provider in nominal terms when considering aid elements, having provided slightly less than one fifth (19%) of the total State aid for COVID-19 measures (EUR 87.7 billion in constant prices). Of this amount, 32% was spent in the first year of the pandemic (EUR 27.79 billion). The French expenditure for COVID-19 measures increased to EUR 41.28 billion in 2021 (47% of the total amount spent by France for these measures in three years), and then decreased to EUR 18.64 billion in 2022 (21% of the total).

Italy follows, having provided 15% of the total State aid for COVID-19 measures in between 2020 and 2022 (EUR 71.1 billion, of which 37% - EUR 26.33 billion - in 2020, 42% - EUR 30.09 billion - in 2021, and 21% - EUR 14.68 billion - in 2022).

In relative terms, (Figure 43), **EU27 Member States provided around 1.36% of their GDP at the peak of the crisis in 2020, and kept it to a similar level (1.25 % of their GDP) in 2021, and then reduced it to 0.48% of their GDP in 2022.**

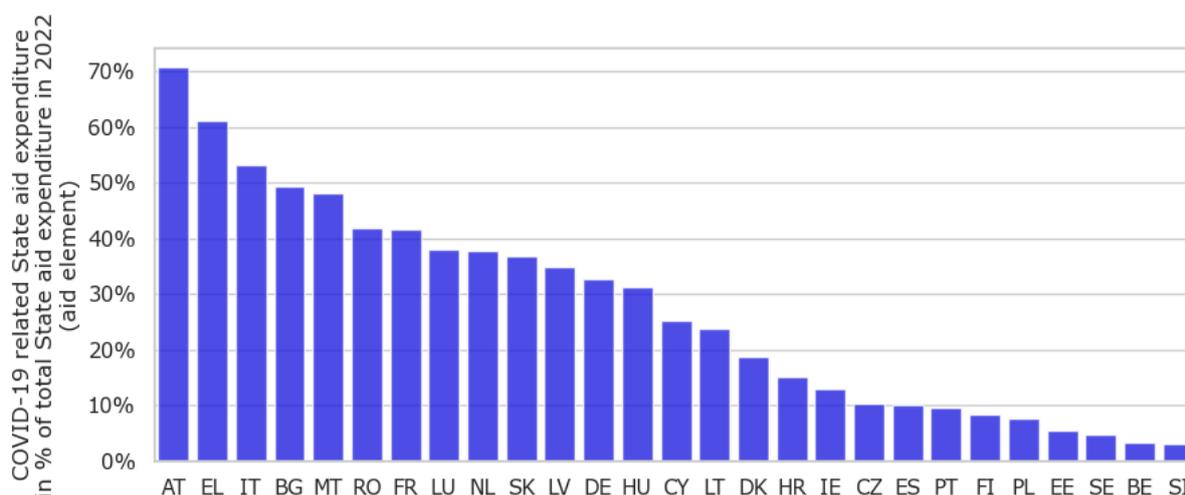
Compared to the absolute amounts, the picture changes when considering the aid expenditure in relative terms. Greece is the country that has provided the most to the economy as compared to its own GDP in the last three years for measures to remedy the serious disturbance of the economy caused by the COVID-19 outbreak, having provided 3.57% of its GDP in 2020, 2.54% in 2021 and around 0.84% in 2022. It is followed by Malta (2.77% of its GDP in 2020, 2.39% in 2021 and 0.73% in 2022), and Poland (4.05% in 2020, 0.72% in 2021, 0.07% in 2022)

Figure 43: Total State Aid expenditure for COVID-19 measures by Member State in 2020, 2021 and 2022 (aid elements, in EUR billion and as a percentage of GDP)



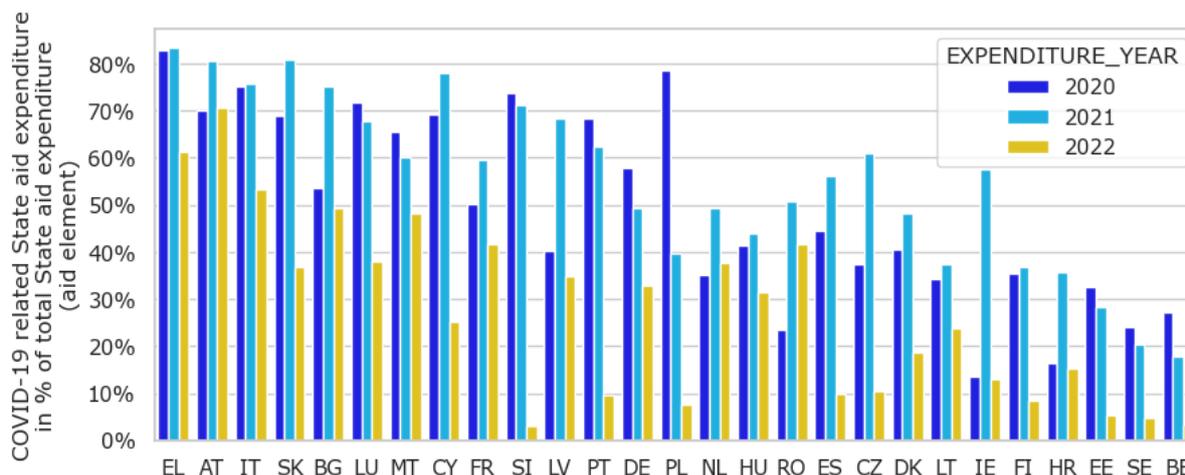
Looking at the proportion of COVID-19 aid out of the total aid granted in 2022 in each Member State (Figure 44), Austria has provided slightly more than 70% of its total State aid expenditure under COVID-19 measures, followed by Greece and Italy, that spent more than half of the total on these measures. Bulgaria, Malta, Romania, and France spent more than 40% under COVID-19 measures. On the contrary, in Slovenia, Belgium, Sweden and Estonia the expenditure for COVID-19 measures counted for 5% or less of the total.

Figure 44: Total State Aid expenditure for COVID-19 measures by Member State in 2022 (aid element, as a percentage of total State aid)



At the EU level, COVID-19 represented most of the aid expenditure in 2020 (57%) and 2021 (56%), and approximately one third (34%) in 2022. Figure 45 below shows the total State Aid expenditure for COVID-19 measures aid element, as a percentage of total State aid, by Member State in 2020, 2021 and 2022.

Figure 45: Total State Aid expenditure for COVID-19 measures by Member State in 2020, 2021 and 2022 (aid element, as a percentage of total State aid)

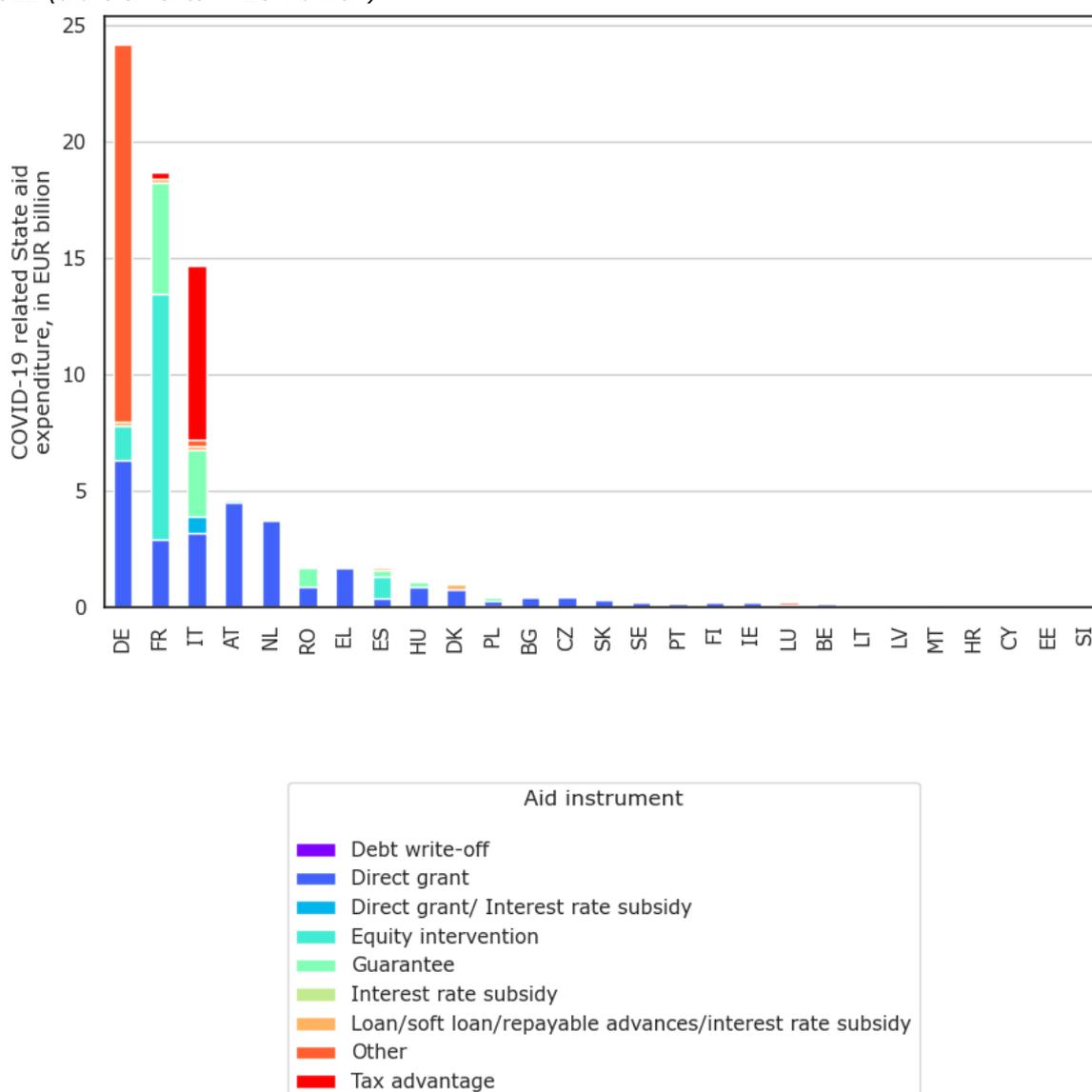


5.2 COVID-19 State aid expenditure by aid instrument

Figure 46 provides a breakdown of the total State Aid expenditure for COVID-19 measures by type of aid instrument in each Member State. Amounts refer to the aid element of each instrument. The largest spender, Germany, provided EUR 16.23 billion, corresponding to 67% of its total spending

under COVID-19 measures, in the form of 'other' instruments⁶⁶. France provided 56% of its total aid elements of COVID-19 aid as equity interventions (EUR 10.53 billion) and 26% (EUR 4.77 billion) as guarantees. Instead, Italy preferred to provide COVID-19 aid in the form of tax advantages (EUR 7.49 billion, approximately 51% of its expenditure for these measures), but made large use of direct grants⁶⁷ (EUR 3.91 billion, corresponding to 27% of its total COVID-19 spending) and guarantees (EUR 2.83 billion, 19%). Austria and the Netherlands used almost exclusively direct grants, with an expenditure of EUR 4.5 billion (98% of the total) and 3.73 billion (99% of the total), respectively.

Figure 46: Total State aid expenditure for COVID-19 measures by Member State and instrument in 2022 (aid elements in EUR billion)



As shown in Figure 47, direct grants account for more than 90% of the total aid elements under COVID-19-related measures in 10 Member States (Austria, Bulgaria, Czechia, Greece, Finland,

⁶⁶ As already specific in this note, this entirely depends on a single German COVID-19 State aid scheme (SA.56790 - Federal Framework "Small amounts of aid 2020" - COVID-19), whose spending, corresponding to EUR 16.23 billion, was reported by the German authorities as "other".

⁶⁷ Including the mixed category direct grants/interest rate subsidies

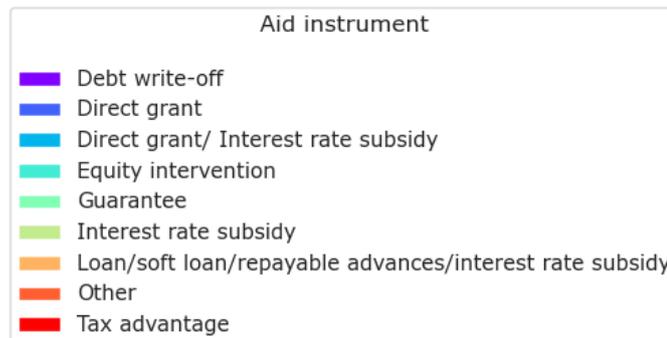
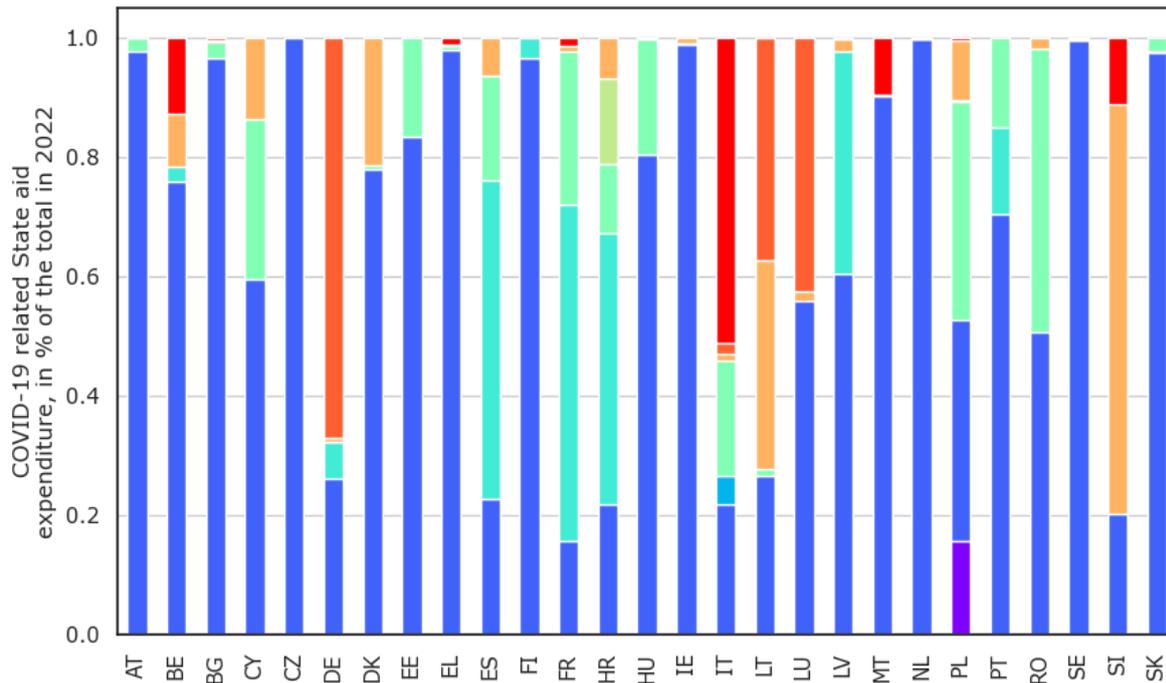
Ireland, Malta, the Netherlands, Sweden, Slovakia), and for more than 50% in other 9 Member States (Belgium, Cyprus, Denmark, Estonia, Hungary, Luxembourg, Latvia, Portugal, Romania).

The Member State with the lowest aid elements in direct grants for COVID-19 measures is Slovenia (20%), where the government preferred to channel aid through repayable instruments (69% of the expenditure in the mixed category loan/soft loan/repayable advances/interest rate subsidy). Loans, repayable advances, and interest rate subsidies represented a large share of total expenditure for COVID-19 measures in Lithuania (35%) and Denmark (21%), although to a lower extent. Equity interventions were the main instrument used for COVID-19 measures in France (56% of the expenditure for COVID-19 measures), Spain (53%) and Croatia (45%), and were largely used also by Latvia (37%).

Guarantees on loans have been extensively used in Romania (47%), but also in Poland (37%), Cyprus (27%) and France (26%). This signals a heavy reliance on this type of credit-based instrument, being the aid element just a small fraction of the underlying contracts.

Tax advantage measures represent the main instrument only in Italy, where 51% of the total COVID-19 support was provided in this way.

Figure 47: Total State aid expenditure for COVID-19 measures by Member State and instruments in 2022 (aid elements in % of the total)



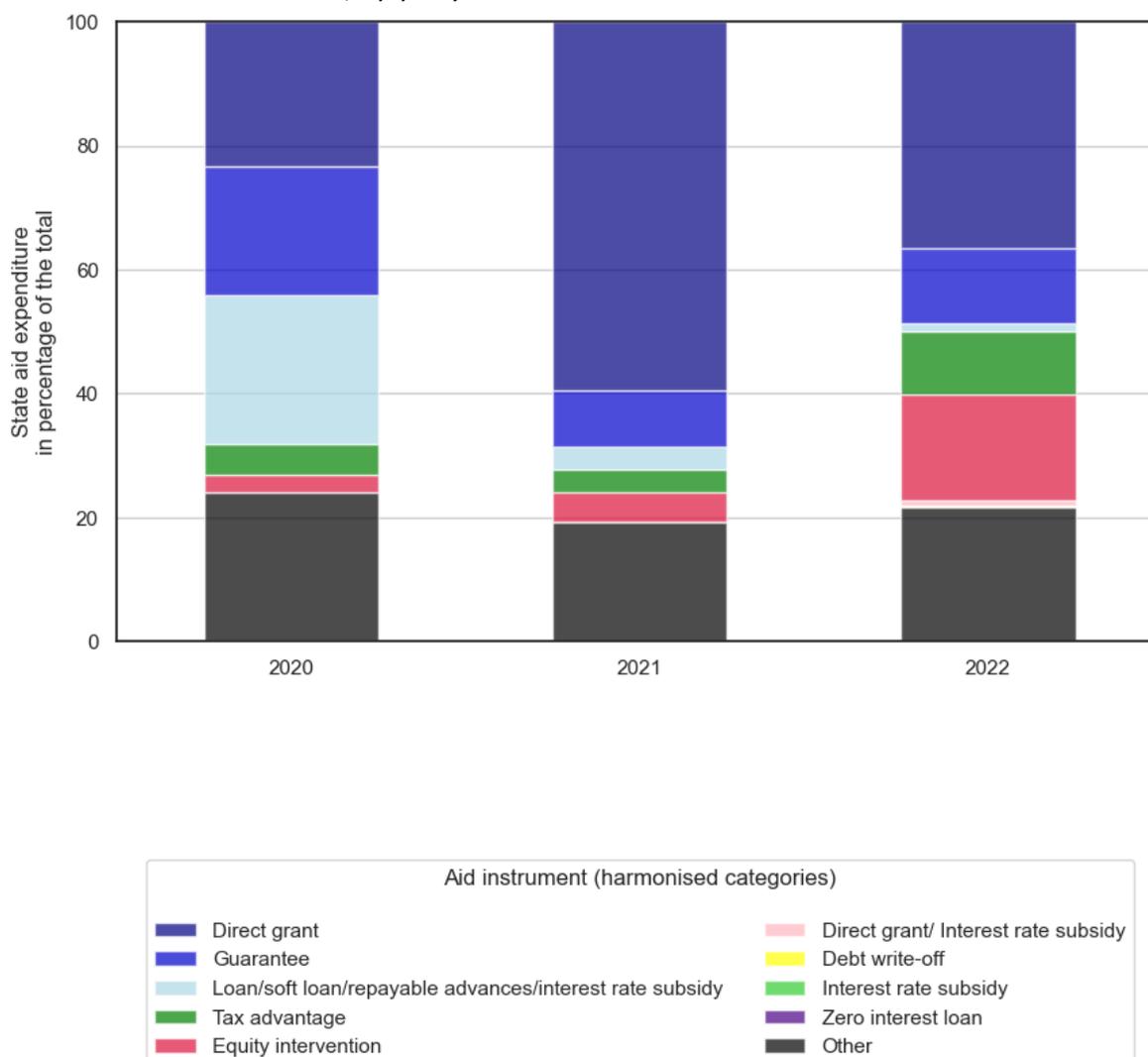
In **2020**, State aid for COVID-19 measures has been **substantially channelled through repayable instruments**. 24% of the COVID-19 expenditure in 2020 was in the form of Loan/soft loan/repayable advances/interest rate subsidy, that constituted the main instrument, and 21% in the form of guarantees. Direct grants represented 23% of the expenditure. The use of tax advantages (5%) and equity interventions (3%) was relatively limited.

In **2021**, **direct grants have risen markedly** (from 23% of the total in 2020 to 59% of the total in 2021), while credit-based instruments have significantly decreased (loans from 24% to 4% of the total and guarantees from 21% to 9%). Tax advantages and equity interventions showed a modest variation, of -1 percentage point and +2 percentage points respectively.

In **2022**, the share of **equity interventions** grew to 17% of the yearly COVID-19 expenditure and the relative weight of **tax advantages** more than doubled from 2020 (10%). 38% of the aid was provided in the form of direct grants⁶⁸ (although this decreased from 2020 by -22 p.p.), while 13% was in the one of repayable instruments (12% guarantees and 1% in the mixed category loan/soft loan/repayable advances/interest rate subsidy).

⁶⁸ Including the mixed category direct grants/interest rate subsidies

Figure 48: Total State aid expenditure for COVID-19 measures by Member State and instruments (aid elements in % of the total, by year)



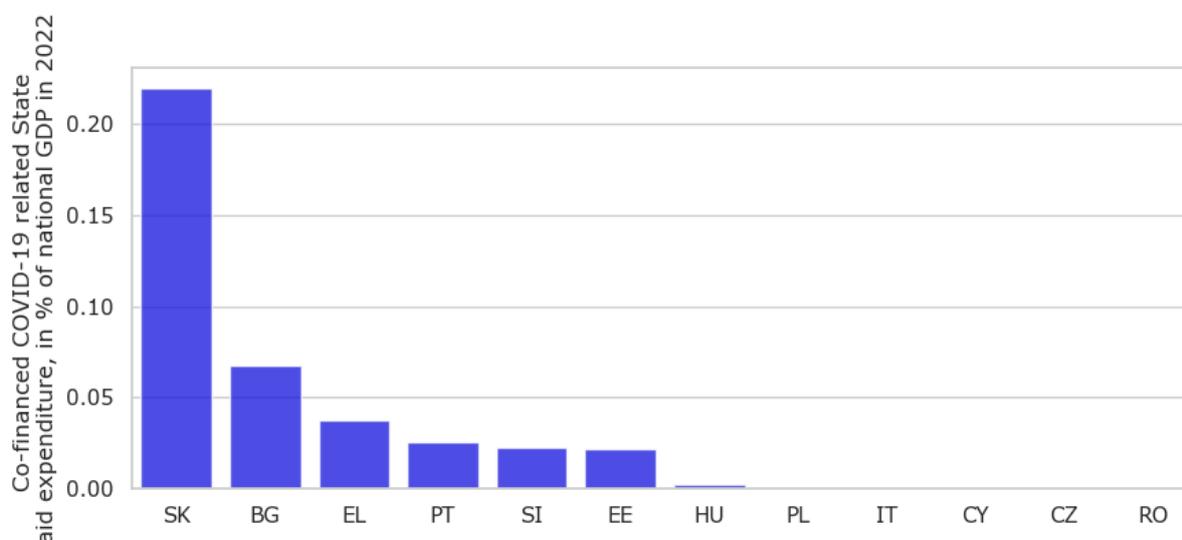
5.3 COVID-19 State aid expenditure on co-financed projects

Financing granted under the structural funds qualifies as State aid, given that EU funds are integrated in the national budget and Member States are free to select beneficiaries (Art 107 TFEU). Therefore, since 2014 Member States must report the total amount of co-financed aid, including both national and EU Structural Funds expenditure⁶⁹. With the pandemic crisis, EU Structural Funds have been directed to finance the implementation of several COVID-19 State aid measures in different Member States. In 2022, total spending on co-financed measures related to the COVID-19 crisis amounted to EUR 463.37 million.

Figure 49 shows the total amount of expenditure in co-financed COVID-19 State aid measures in 2022 across Member States. Total spending on co-financed COVID-19 subsidies represent more than 0.2% of national GDP in Slovakia. Other Member States that implemented co-financed measures are Bulgaria, Greece, Portugal, Slovenia, Estonia, Hungary, Poland, Italy, Cyprus, Czechia and Romania, although to a lesser extent (State aid expenditure represent less than 0.07% of national GDP in these Member States).

⁶⁹ The corresponding projects are funded under the sole responsibility of the Member States.

Figure 49: State aid expenditure for COVID-19 measures on co-financed projects by Member State (aid elements, in percentage of GDP)



5.4 Pan-European guarantee fund in response to COVID-19

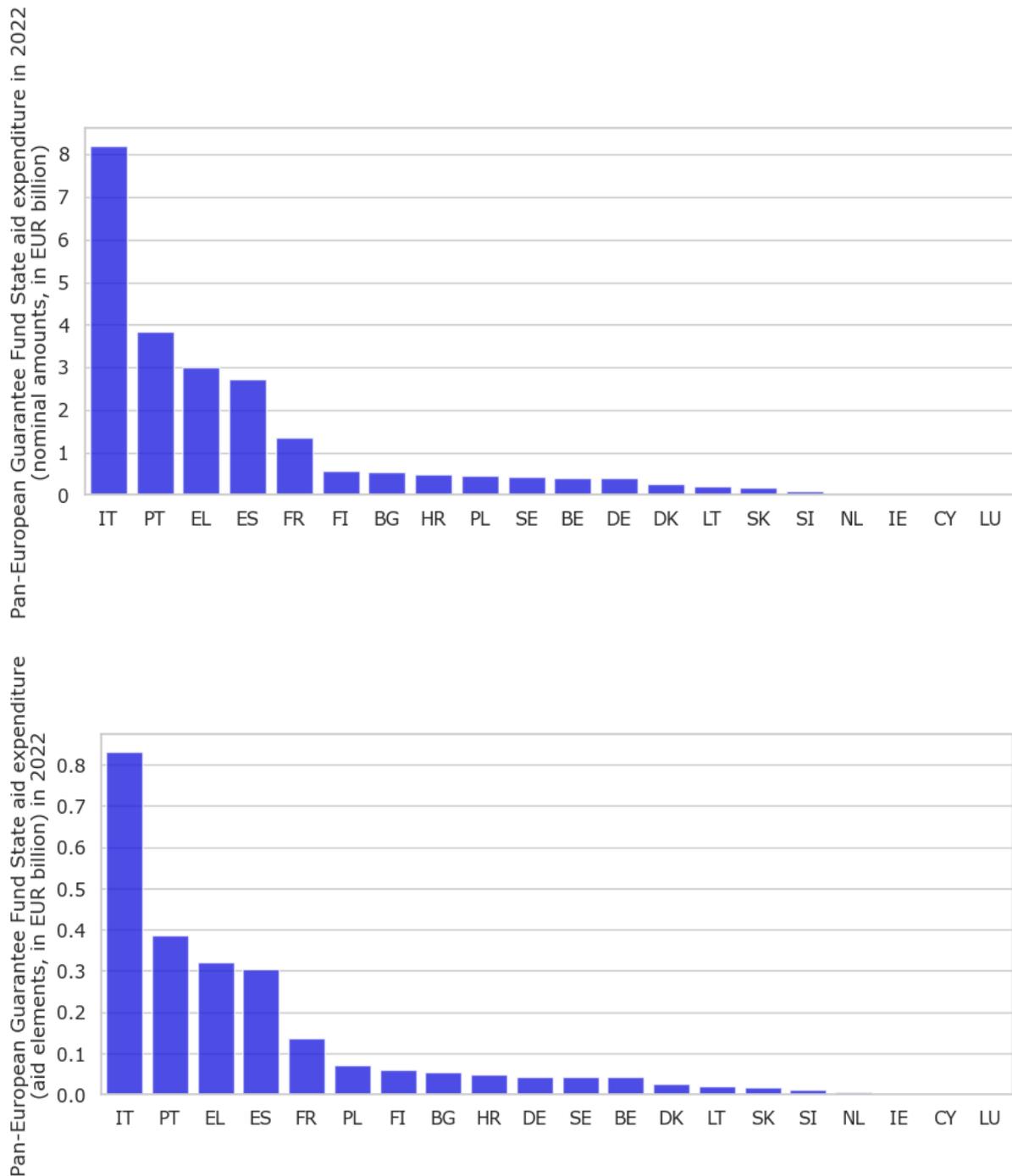
The Pan-European Guarantee Fund (PEGF) was established in 2020, as part of the EU's COVID-19 response to mitigate the impact of the pandemic. It has been a temporary measure aiming to provide additional support to Member States in need of financing to deal with the pandemic. The PEGF is subject to the State aid rules of the European Union, including reporting requirements.

The PEGF is a guarantee scheme that is managed by the European Investment Bank (EIB) Group. The participating Member States are Belgium, Bulgaria, Denmark, Germany, Ireland, Greece, Spain, France, Croatia, Italy, Cyprus, Lithuania, Luxembourg, Malta, the Netherlands, Austria, Poland, Portugal, Slovakia, Slovenia, Finland and Sweden. Each participating Member State contributed to the PEGF's common budget through a contribution agreement. This pool of resources that constitutes the budget of the fund has been used to guarantee the issuance of debt instruments by eligible entities established in all EU participating Member States that were facing difficulties in accessing financing during the pandemic crisis. More specifically, the measures in the scope of the PEGF provide aid in the form of guarantees or counter-guarantees on senior and subordinated debt instruments, including also guarantees on synthetic securitisation tranches. The PEGF is also designed to encourage contributions from the private sector by sharing the risk of investment with private investors. The signature period for PEGF-supported projects ended on 31 December 2022.

This section provides an overview of the guarantees that have been actually issued in 2022 in the participating Member States⁷⁰.

⁷⁰ Austria and Malta do not appear in the chart as no PEGF measures have been implemented in 2022.

Figure 50: State aid expenditure under the Pan-European Guarantee Fund by Member State in 2022 (nominal amounts -upper chart- and aid elements -lower chart-, EUR billion)



In 2022 the PEGF has issued guarantees to undertakings in the participating Member States for total nominal value of EUR 23.3 billion. As shown in Figure 50, **Italy** is the Member State where the largest volume of measures under the PEGF has been implemented in 2022, corresponding to a total nominal amount of EUR 8.2 billion (EUR 832.27 million in aid element). Portugal, Greece, Spain and France follow, with a total nominal amount and aid element that are less than half than that of Italy. All the other Member States reported total nominal amounts below EUR 500 million (around EUR 70 million of aid elements).

In percentage of national GDP (Figure 51 and Figure 52), Portugal and Greece are the Member States with the largest use of the PEGF, with more than 0.15% of domestic GDP in 2022 when considering aid elements. Croatia, Bulgaria, and Italy follow with amounts in the range 0.07% - 0.04% of national GDP.

Figure 51: State aid expenditure under the Pan-European Guarantee Fund by Member State in 2022 (nominal amounts -upper chart- and aid elements -lower chart-, percentage of national GDP)

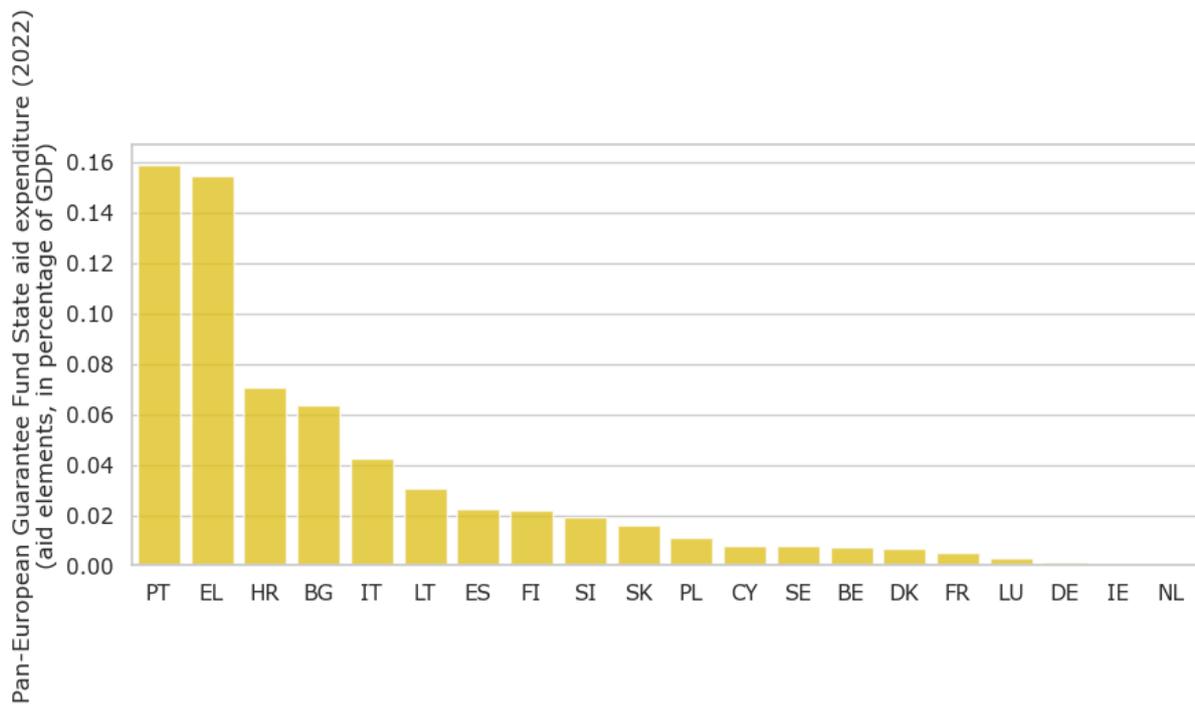
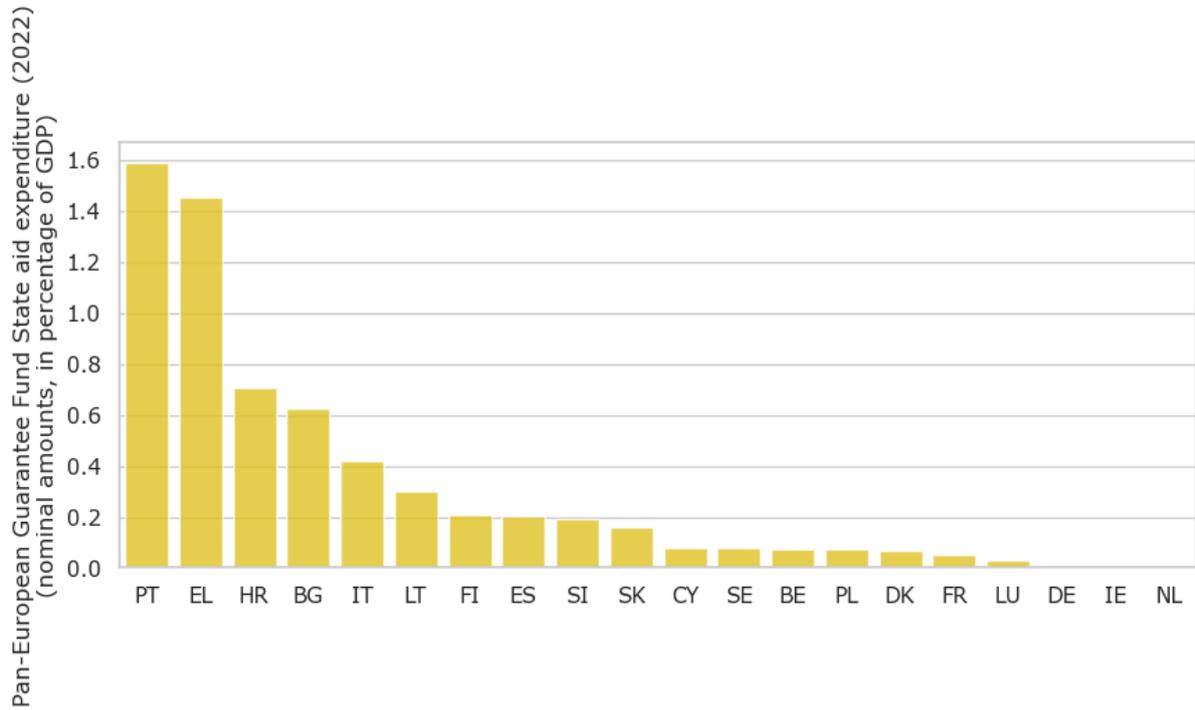
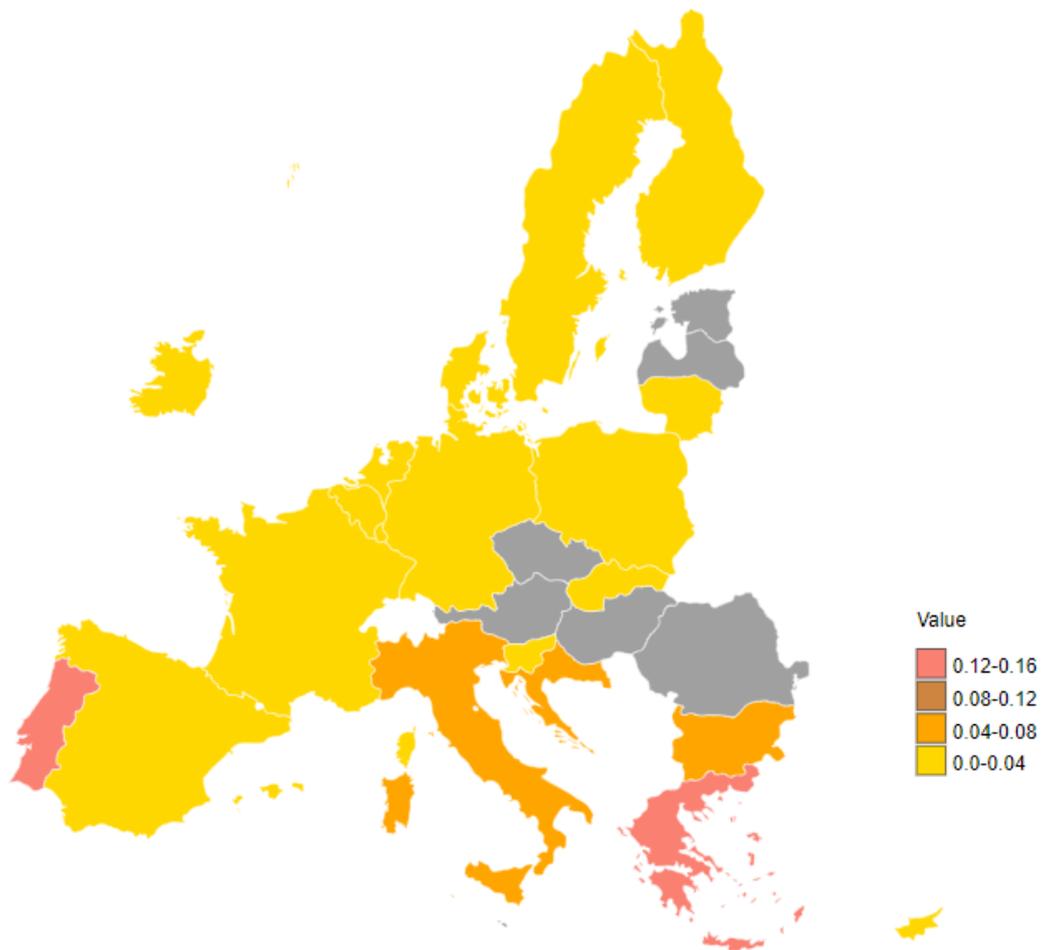


Figure 52: Map of State aid expenditure under the Pan-European Guarantee Fund by Member State (aid elements, as percentage of national GDP)



6 State aid measures supporting the economy in mitigating the impact of Russia's war of aggression against Ukraine

6.1 Overview

This section compares the **nominal amounts** of the aid granted to help mitigating the impact of Russia's war of aggression against Ukraine with the corresponding **aid elements**. Those measures have been approved either directly under the Temporary Crisis Framework or based on its principles.

In absolute terms, looking at the **nominal amounts** of the TCF-related State aid measures provided to undertakings in 2022 (Figure 53), **EU27 Member States provided EUR 65.05 billion**. Germany spent around 60.6% of the total nominal amounts (EUR 39.41 billion), followed by Italy with 16.3% (EUR 10.57 billion), and Spain (12.5%, EUR 8.13 billion). Poland spent 3% of the TCF-related State aid (EUR 1.98 billion), Romania the 2.2% (EUR 1.44 billion) and France (EUR 1.38 billion).

In relative terms and considering the nominal values of the aid (Figure 54), Germany is still the country that has provided to the economy the most as compared to its own GDP in 2022 (1.02%), followed by Spain (0.6%), Italy (0.54%), Romania (0.5%), Poland (0.3%). France provided a much lower relative amount of TCF-related nominal aid, corresponding to around 0.05% of its national 2022 GDP.

Figure 53: Total State Aid expenditure for TCF-related measures by Member State in 2022 (nominal amounts, in EUR billion)

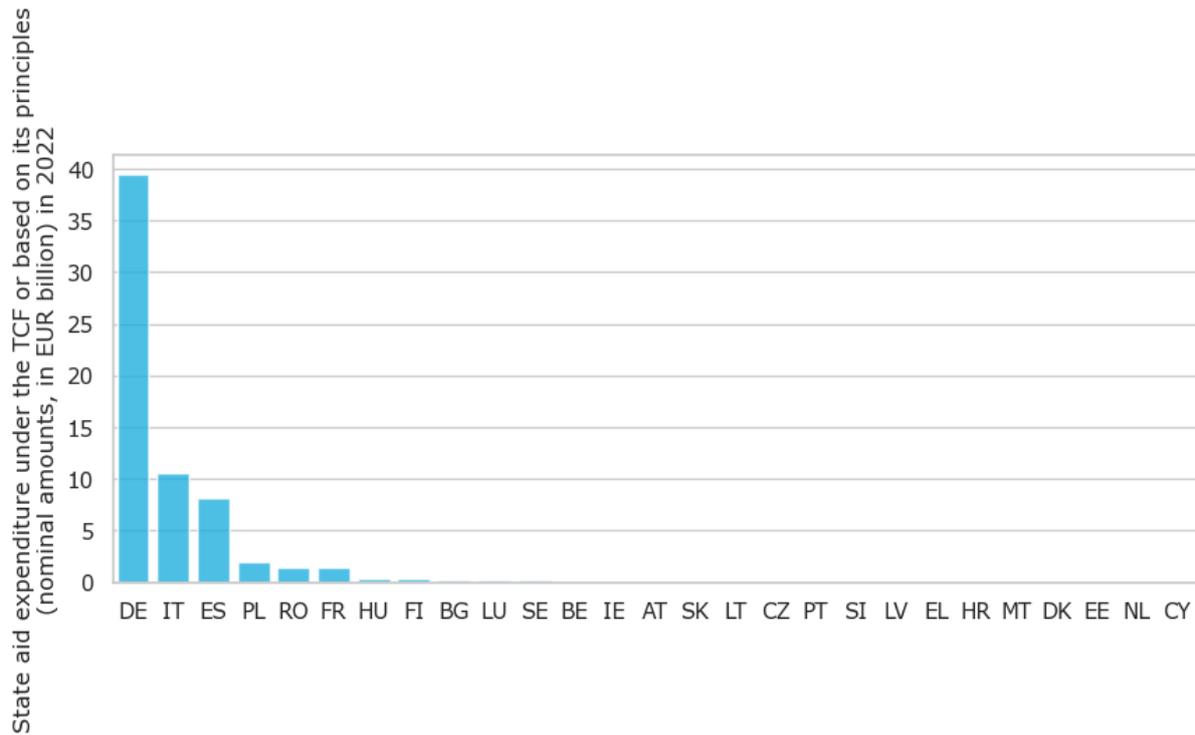
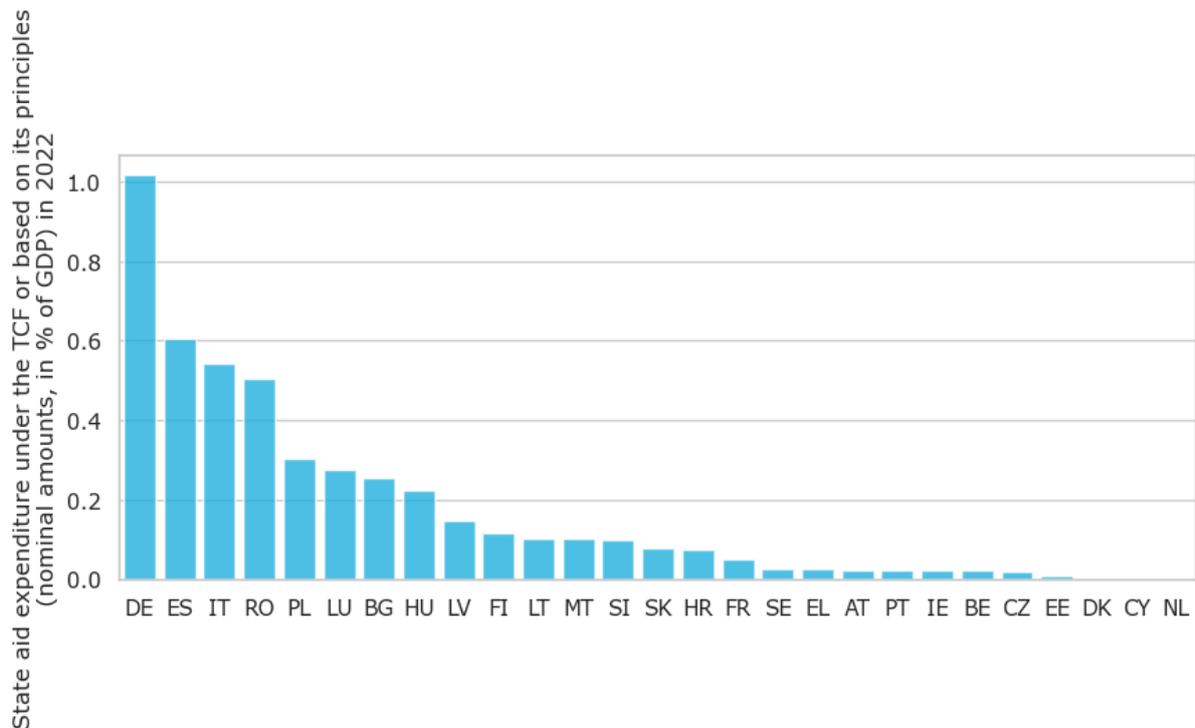


Figure 54: Total State Aid expenditure for TCF-related measures by Member State in 2022 (nominal amounts, as a percentage of 2022 GDP)

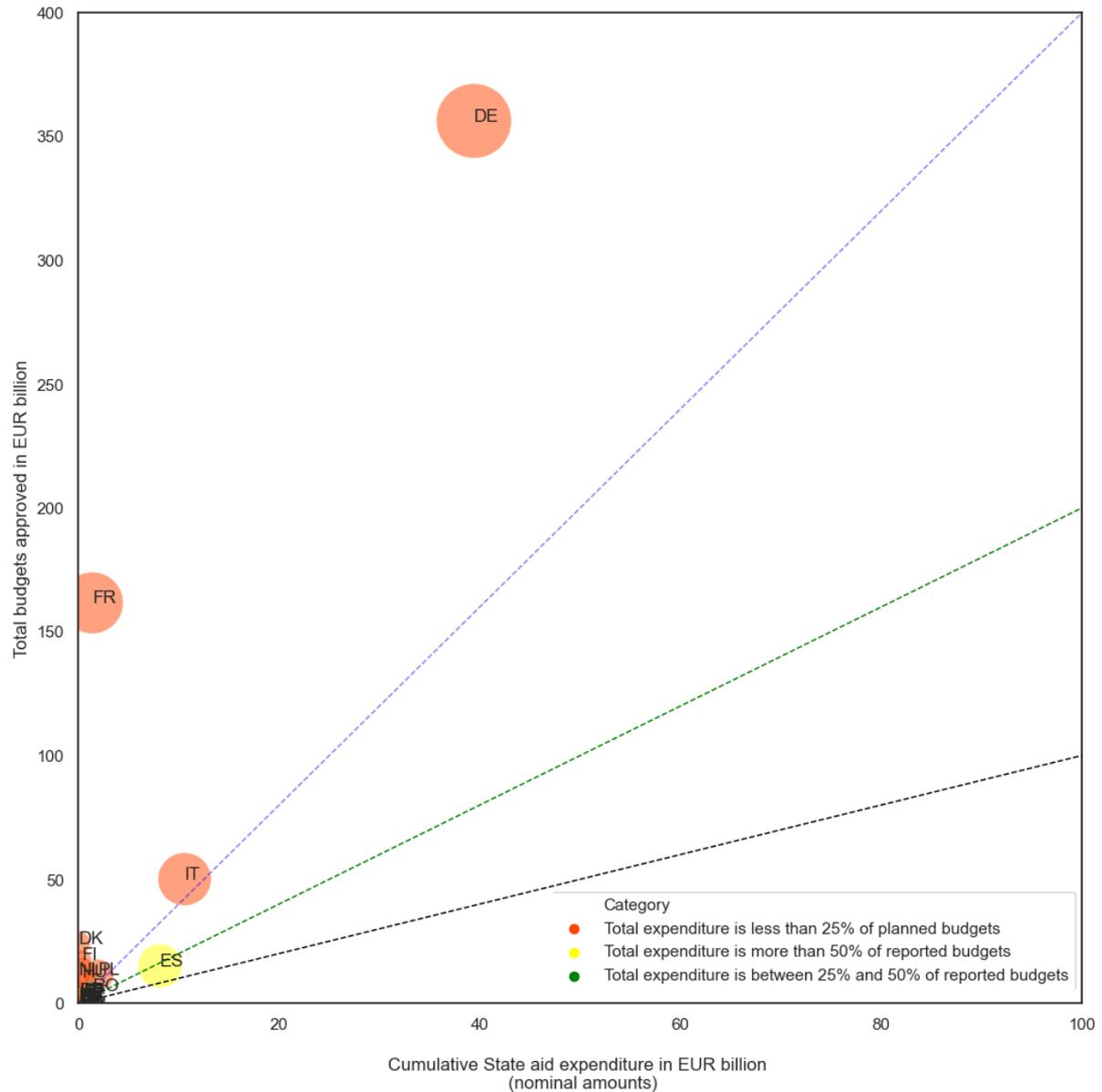


In the period between the adoption of the TCF on 23 March 2022 and December 2022, out of nearly EUR 679.23 billion of aid approved, EUR 65.05 billion in nominal amounts was actually spent, representing 9.6% of all the aid approved. Thus, Member States have provided to their companies only a small percentage of the amounts approved by the Commission.

Only four Member States (Bulgaria, Spain, Latvia and Sweden) have spent more than 50% of the approved budgets. Romania has spent between 25% and 50% of the approved budget.

The remaining 22 Member States⁷¹ have spent less than 25% of the budgets approved by the end of 2022.

Figure 55: Relation between cumulative State Aid expenditure and the total budgets approved in by Member State (nominal amounts in EUR billion)



When looking at the **aid element**, which is the correct metric to look at in order to compare the aid provided through different instruments, as is the case with the TCF-related measures, **the aggregate aid element provided by all EU27 Member States in 2022 amounts to EUR 39.33 billion**. In absolute values, **Germany** remains the country that has provided the most, with an amount of EUR 24.18 billion, significantly higher than the ones granted in the other Member States, more than three times higher than the one spent by **Spain**, that follows with EUR 7.29 billion. **Italy**, which chose to channel a large share of TCF-related aid through repayable instruments, show a much lower amount as aid elements (EUR 3.83 billion). The same can be observed for Poland, with EUR 667 million of TCF-related aid elements disbursed at the end of 2022.

⁷¹ Austria, Belgium, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Slovenia, Slovakia.

In relative terms, when looking at the aid elements (Figure 57) **Germany remains the Member State with the largest share of TCF-related State aid expenditure relative to 2022 national GDP** (0.62%), followed by Spain (0.54%). Bulgaria and Romania spent both around 0.25% of their national GDP, Hungary and Italy both around 0.2%.

The different level of support provided by Member States may also be explained by differing economic fabrics, in particular in terms of size or importance of heavy or energy-intensive industries, or by differently structured energy sectors. Risks of failures of systemic energy companies on the scale of the German undertakings (Uniper and SEFE, that benefitted of the large recapitalisations) did not materialise in other Member States. Thus, in other Member States, companies may have (indirectly) benefited from general energy measures, often benefiting households, without necessarily needing major industrial schemes designed for (heavy) industry and qualifying as State aid.

Figure 56: Total State Aid expenditure for TCF-related measures by Member State in 2022 (aid elements, in EUR billion)

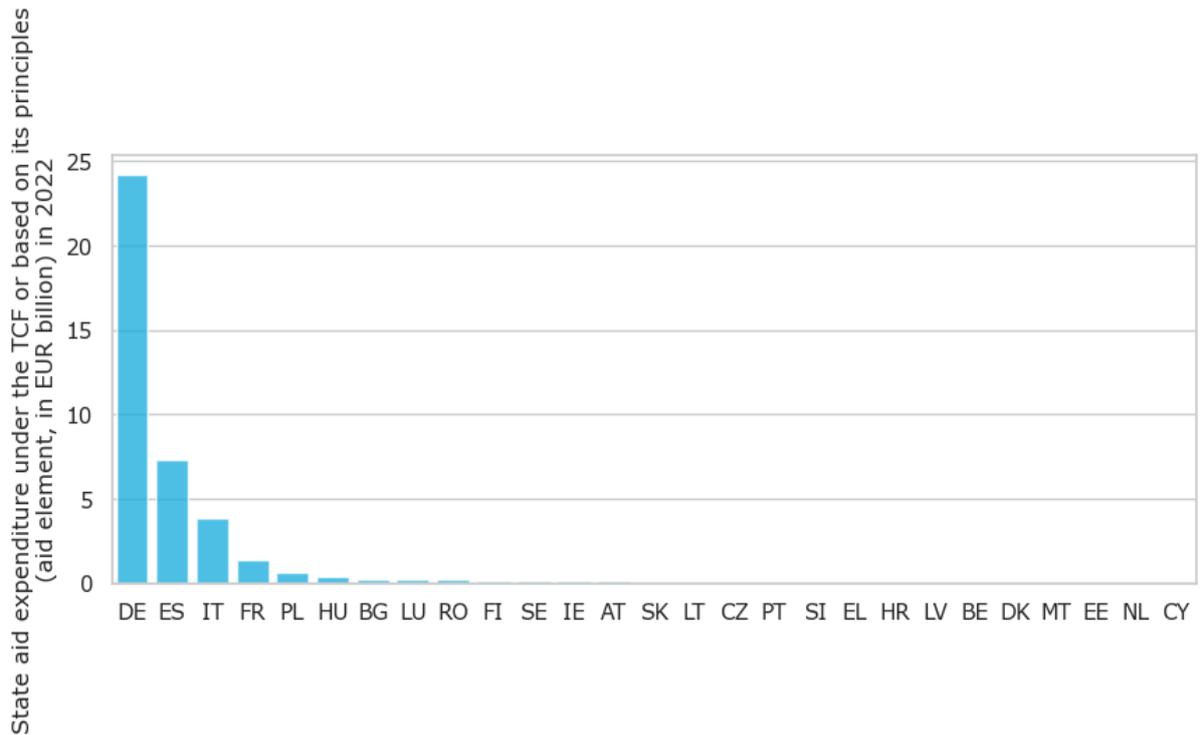


Figure 57: Total State Aid expenditure for TCF-related measures by Member State in 2022 (aid elements, as a percentage of 2022 GDP), as a map (upper chart) and bar chart (below)

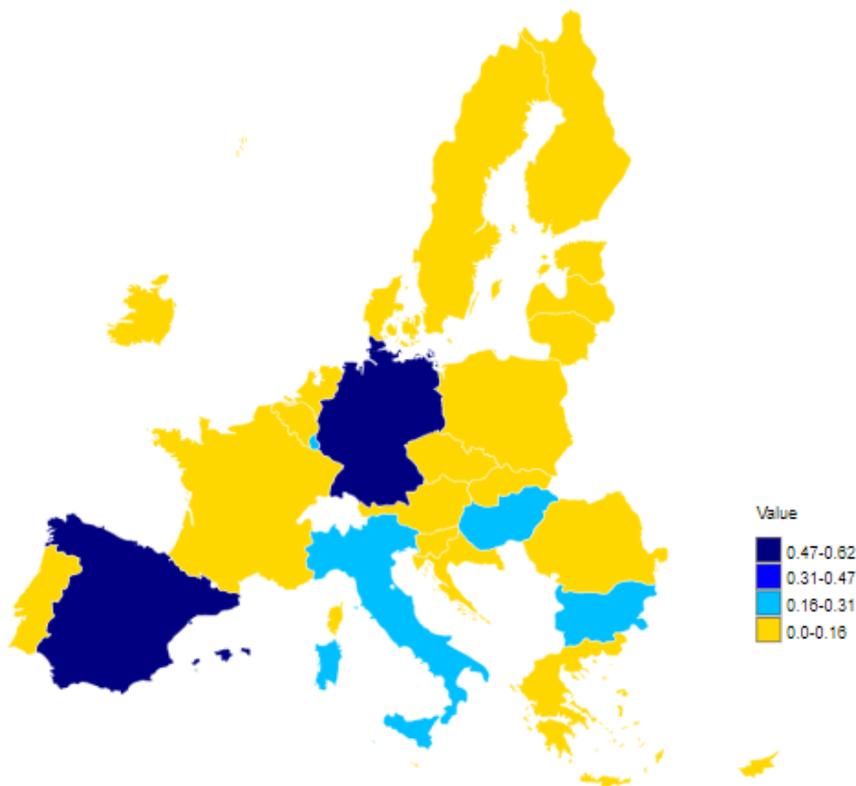
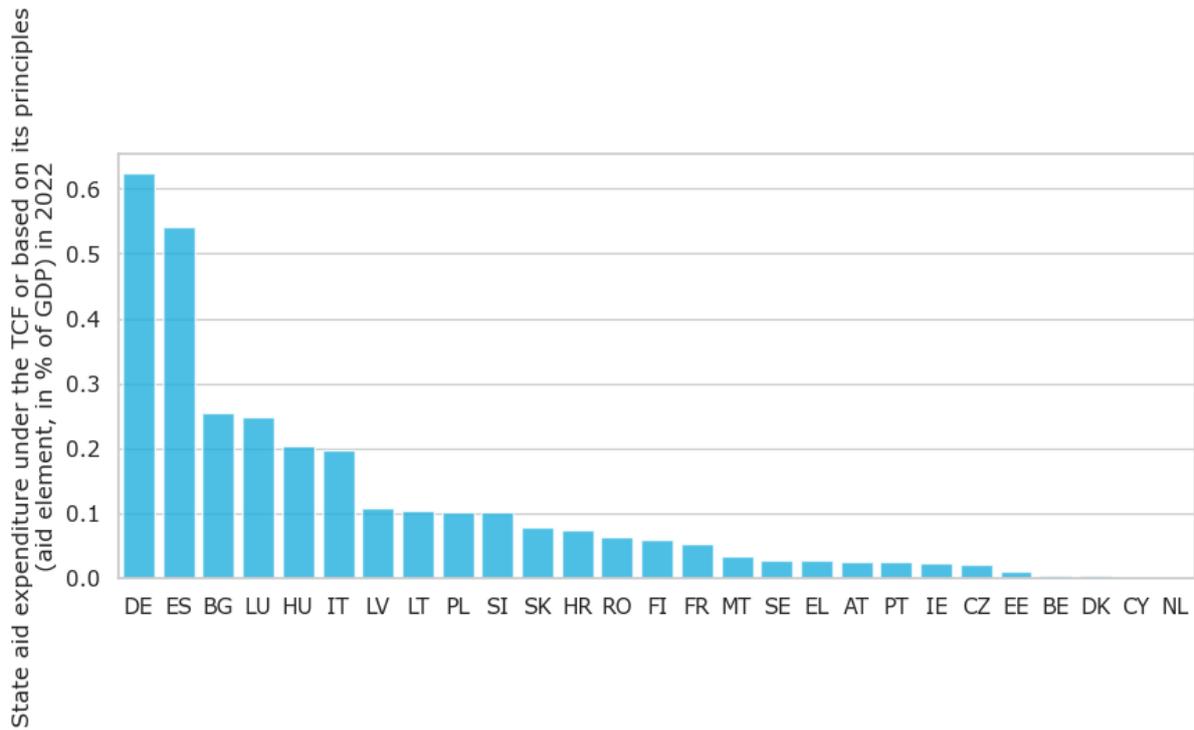
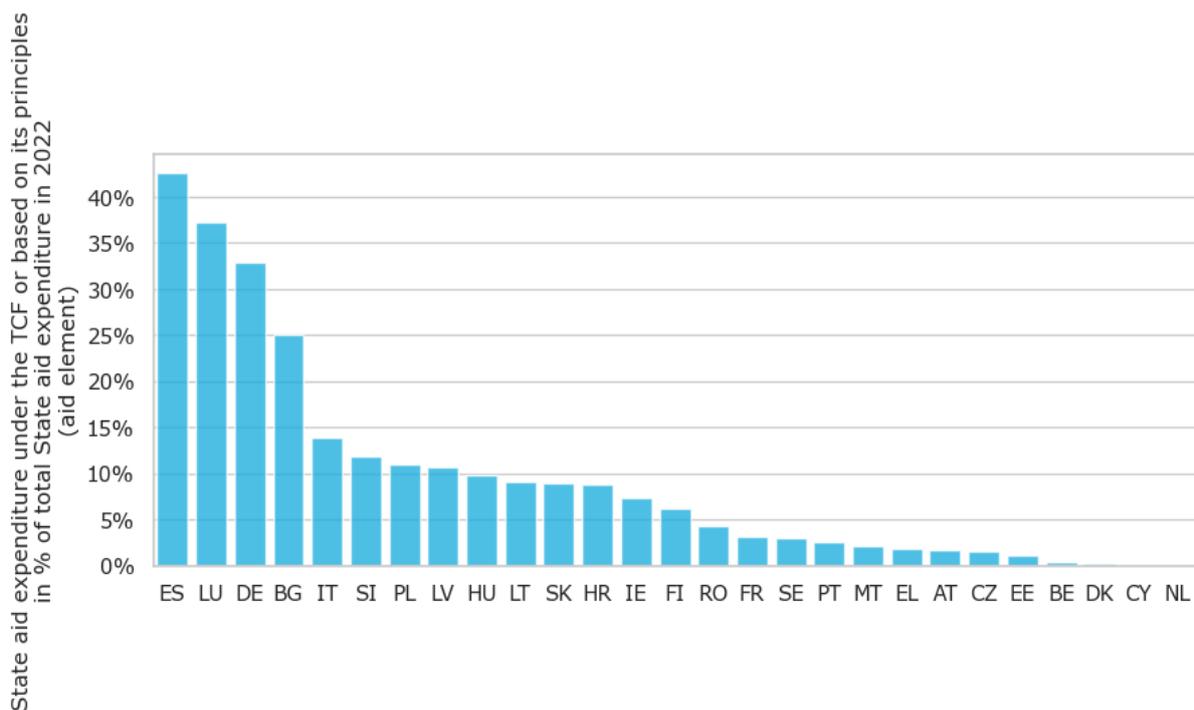


Figure 58: Total State aid expenditure under the TCF or based on its principles by Member State in 2022 (aid element, in % of GDP)



Looking at the proportion of TCF-related aid out of the total aid granted in 2022 in each Member State (Figure 59), Spain provided more than 40% of the total State aid expenditure under TCF-related measures, followed by Luxembourg and Germany, that spent more than 30% of the total State aid expenditure for 2022 for TCF-related measures, and Bulgaria that destined around one quarter of the expenditure to these measures. On the contrary, in the Netherlands, Cyprus, Denmark and Belgium the expenditure for TCF-related measures count for 0.3% or less of the total.

Figure 59: Total State Aid expenditure for TCF-related measures, aid element, as a percentage of total State aid, by Member State



6.2 TCF-related State aid expenditure by objective

While remedy for a serious disturbance in the economy accounts for around 96.9% of the total expenditure for crisis objectives under the TCF or based on its principles in 2022 (EUR 38.12 billion), the remaining 3.1% (EUR 1.2 billion) was addressed to other objectives.

Around EUR 1.17 billion have been spent for agriculture, forestry, and rural areas; EUR 30.19 million for environmental protection, including energy savings; EUR 3.48 million as compensation of damages caused by natural disaster; and around EUR 600 000 for fisheries and aquaculture.

Figure 60: Total State aid expenditure under the TCF or based on its principles by Member State in 2022 (in EUR billion)

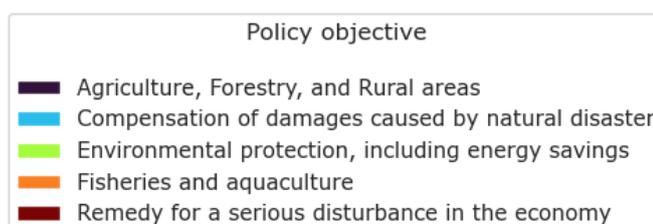
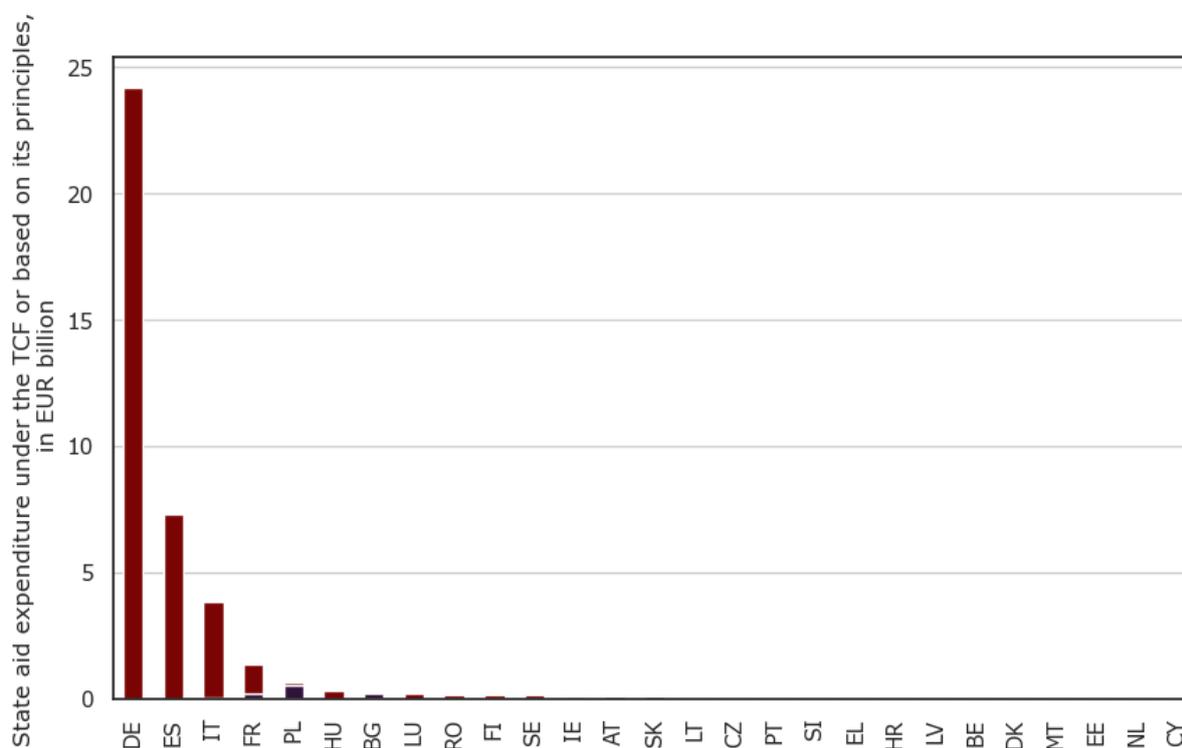
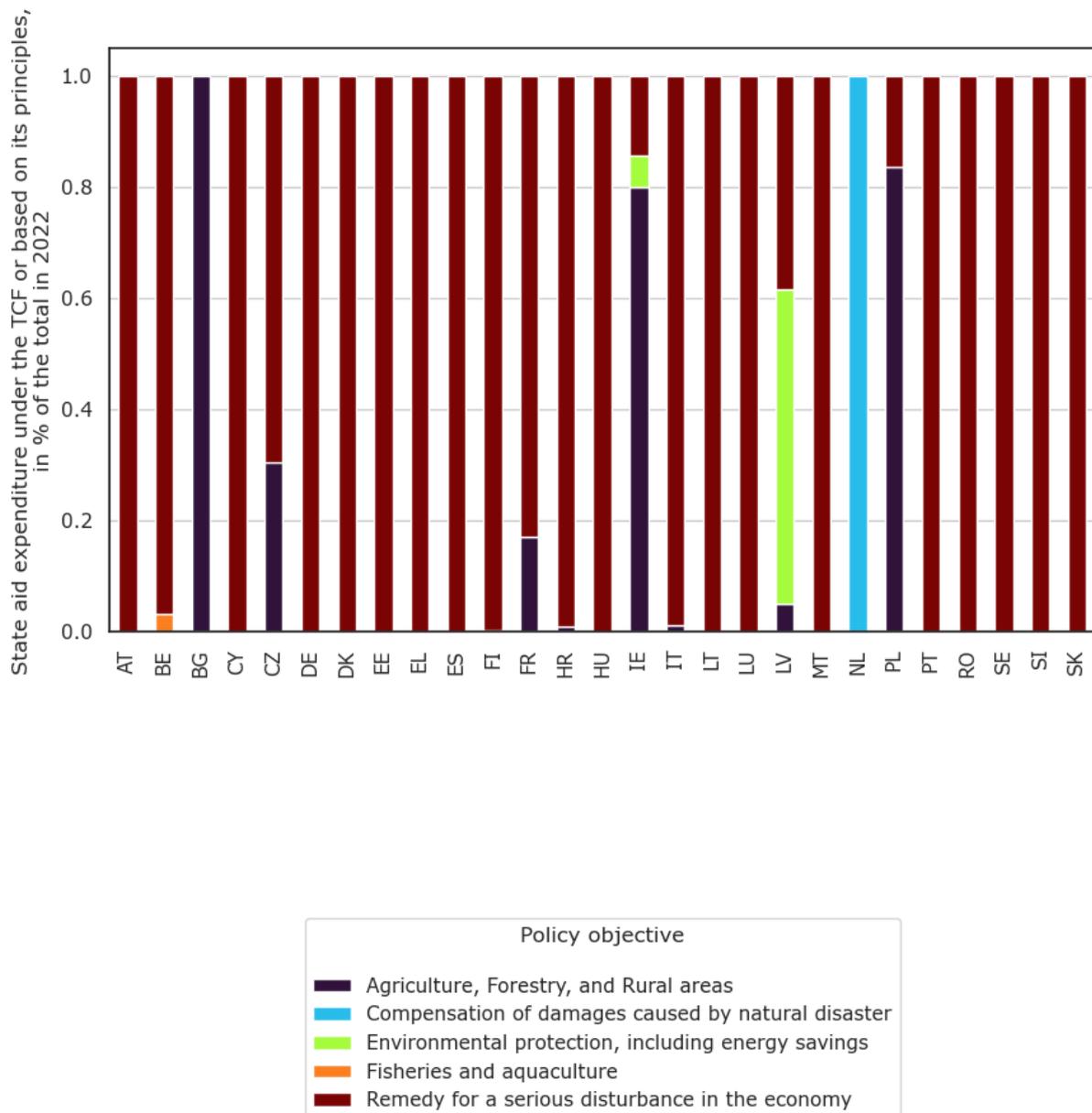


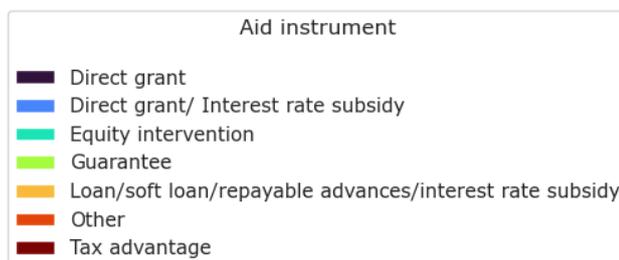
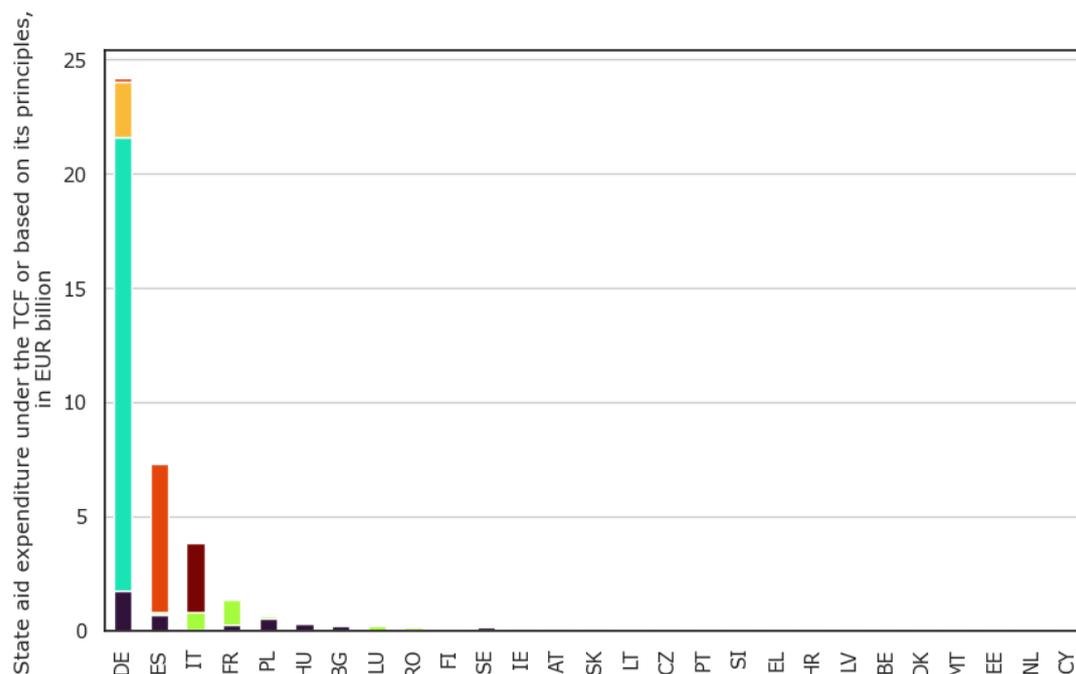
Figure 61: Total State aid expenditure under the TCF or based on its principles by Member State in 2022 (% of the total)



6.3 TCF-related State aid expenditure by aid instrument

Figure 62 provides a breakdown of the total State Aid expenditure for TCF-related measures by type of aid instrument in each Member State. Amounts refer to the aid element of each instrument. The largest spender, Germany, provided EUR 19.84 billion, corresponding to 82% of its total spending under TCF-related measures, in the form of equity interventions. Spain provided 89% of its total aid elements of crisis aid related to the TCF as 'other instruments' (EUR 6.45 billion). Italy provided 78% of its total TCF-related spending (EUR 2.98 billion) in the form of tax advantages and 21% in the form of guarantees (EUR 811.13 million). France provided EUR 1.11 billion on guarantees (80% of its total TCF spending) and EUR 269.14 million in the form of direct grants (20%).

Figure 62: Total State aid expenditure for TCF-related measures in 2022 by instruments (aid elements in % of the total, by Member State)



As shown in Figure 63, direct grants account for 100% of the total aid elements under TCF-related measures in 12 Member States (Austria, Bulgaria, Cyprus, Czechia, Estonia, Greece, Ireland, the Netherlands, Portugal, Slovakia, Slovenia, Sweden). In Hungary, direct grants account for 99%, while the remaining 1% was spent in the form of guarantees.

The Member States showing the lowest aid elements in direct grants for TCF measures are Italy (1%), Belgium (3%), Luxembourg (4%) and Denmark (5%).

Equity interventions represent a large share of the TCF-related spending in Germany (82%). These large recapitalisations were justified by the systemic character of the energy supply companies, extending beyond the German wholesale energy markets. This form of aid represents a large share of the aid expenditure for TCF measures in Finland (around 51% of the aid expenditure).

Guarantees on loans have been largely used in Luxembourg (96%), Croatia (90%), France (80%) and Romania (77%). Credit based instruments have been used also in Italy (21%) and Poland (16%) to a lesser extent. This signals a heavy reliance on this type of credit-based instrument, being the aid element just a small fraction of the underlying contracts. Repayable advances

account for 95% or more of the expenditure in Belgium and Denmark, more than half (56%) in Lithuania, and 38% in Malta.

Figure 63: Total State aid expenditure for TCF-related measures, by instruments (aid elements in % of the total, by Member State)

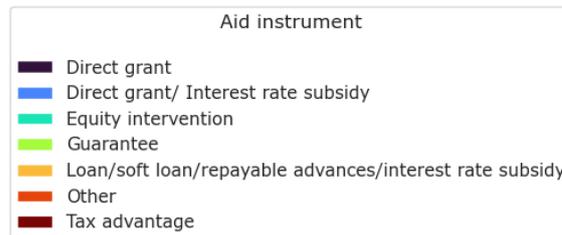
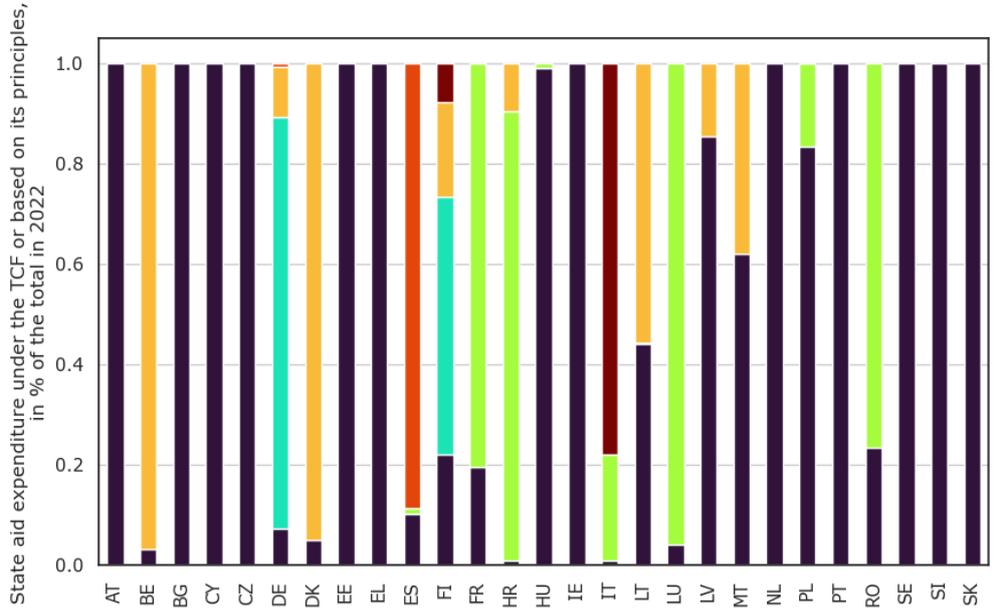
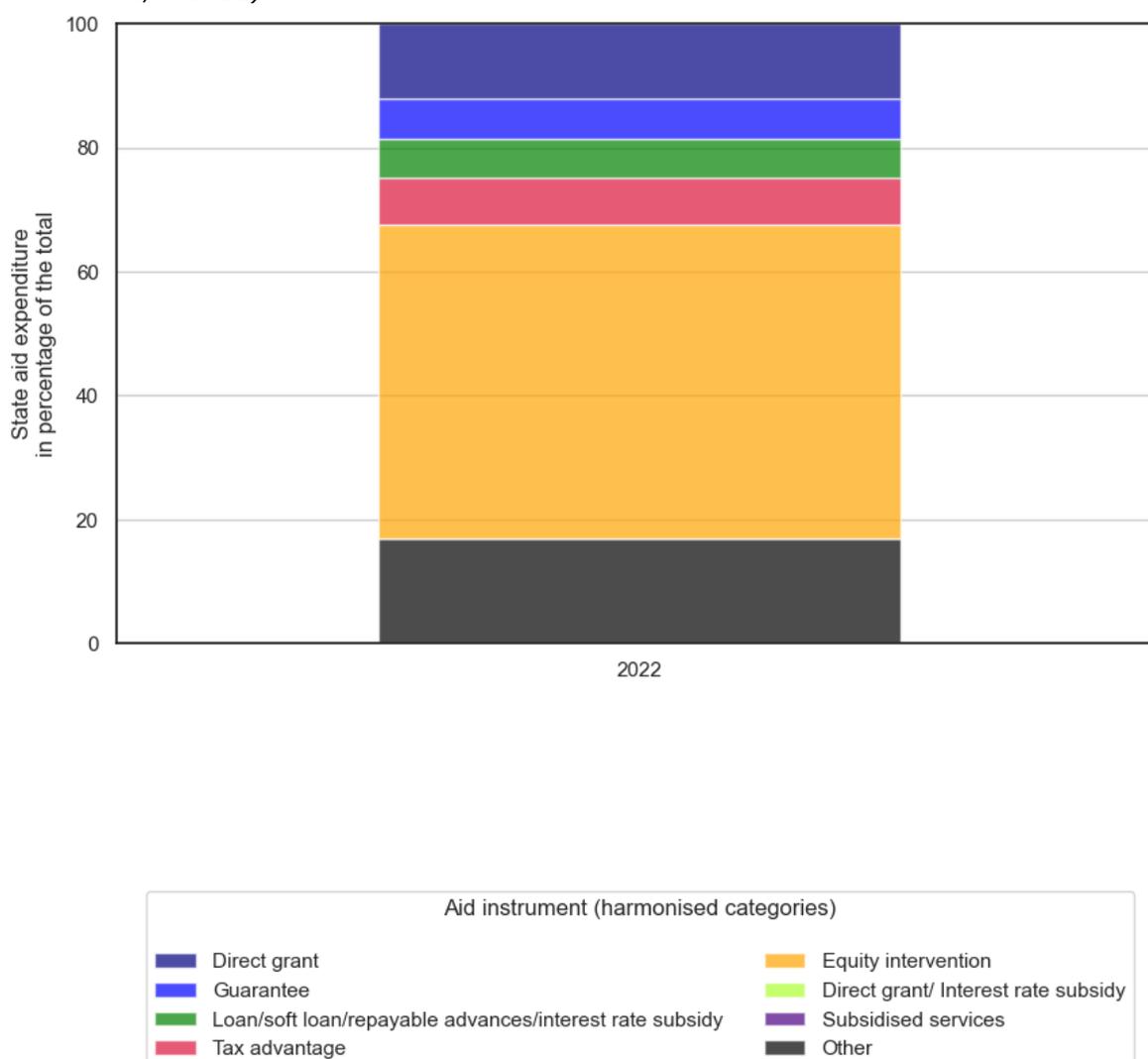


Figure 64: Total State aid expenditure for TCF-related measures, by instruments (aid elements in % of the total, in 2022)



7 A closer look at block-exempted measures

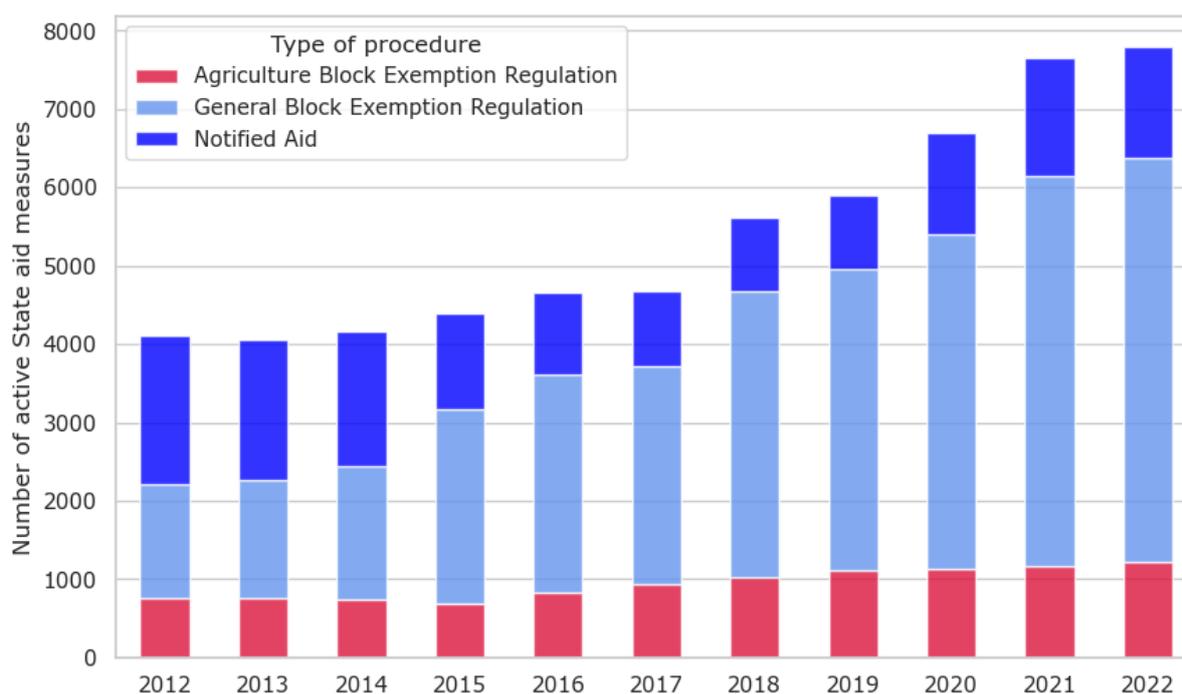
The State aid Modernisation is a major reform package implemented by the Commission in 2014 and aimed at simplifying and modernizing the State aid rules. One of the cornerstones of this reform was the revision of the General Block Exemption Regulation (GBER), which simplifies aid-granting procedures for Member States by empowering Member States to authorise aid without prior notification. This is possible for a wide range of measures fulfilling horizontal common interest objectives. Similar block-exemption regulations have been adopted in the agricultural sector (ABER) and for fisheries (FIBER). The SAM reform also modernised several State aid regulations and sectoral guidelines.

Due to the implementation of the new set of State aid rules, and in particular of the block-exempted ones, granting authorities in Member States have been given a much wider scope to design and implement aid measures. At the same time, the Commission still plays its role as guardian of fair competition within the single market. The post-SAM rules have been designed to strike a balance between wider scope for the Member States and proper compliance and smarter State aid control.

7.1 GBER uptake is steady

As observed in previous Scoreboards, the Member States are increasingly using block-exempted measures since the SAM. **Member States reported to have provided aid under 5157 GBER measures in 2022, representing 65% of all the active measures against 41% in 2014 when the SAM came into place.** Moreover, there are 1220 active ABER measures in 2022, and 89 FIBER active measures. Therefore, **GBER, ABER and FIBER measures together represent 82% of all the active measures in 2022.** Since the SAM, Member States reported expenditure under additional 3 460 GBER measures, additional 476 ABER measures and 89 FIBER measures. On the contrary, notified measures show a remarkable decreasing trend between 2014 and 2019 (from 1 716 active measures in 2014 to 945 in 2019), with a surge in 2020 (1 293 active notified measures) and in 2021 (1 496 active notified measures) due to the implementation of the crisis measures to support the economy in the pandemic. In 2021, the number of active notified measures was 1 421, due to the implementation of crisis measures, both in response to the pandemic, but also to address the energy crisis that resulted from Russia’s aggression against Ukraine. Looking at the new block-exempted measures implemented in 2022, Member States reported expenditures for the first time for 1 901 new GBER, 284 ABER and 18 FIBER measures, corresponding altogether to **84% of the new State aid measures.** Excluding the crisis measures, both related to the COVID-19 outbreak and to the Russian invasion of Ukraine, the **new GBER measures account 93% of total new non-crisis measures.** After peaking in 2021, when a total of 3 332 new measures were implemented (of which 2 446 new GBER measures, 292 new ABER measures and 30 new FIBER measures), the absolute number of new measures has decreased in 2022 (-20% from 2021 overall).

Figure 65: Number of cases for which expenditure has been reported by Member States, breakdown by type of procedure, 2012-2022 (excluding fisheries block-exempted aid)^{72,73}



As observable from Figure 66 and Table 2, State Aid spending under the GBER has been increasing since SAM, with an annual rate of approximately +15% over the period 2014-2018 slowing down to an average growth rate of around 3% in 2019 and 2020. The growth rate of expenditure under GBER measures peaked in 2021 with respect to the previous year (+21%). Together with the general reduction in expenditure, the actual expenditure of GBER schemes also decreased in 2022

⁷² Number of active FIBER cases in 2022: 89.

⁷³ As Member States may report expenditures for a given scheme over more than a decade, some measures have been authorised under a now repealed legal basis, such as Council Regulation No 994/98 of 7 May 1998, “BER” (OJ L 142, 14.5.1998).

(-12%). In 2021 and 2020, notified aid procedures largely prevailed due to the unprecedented aid mobilised in the context of the COVID-19 crisis, accounting for more than 80% of total Member States' aid expenditure each year. In 2022, together with a reduction of around -41% in absolute amounts, also the relative share of notified aid reduced to around 73% of the aid expenditure.

Figure 66: Breakdown of State aid spending by type of procedure (excluding fisheries block-exempted aid), in EUR billion in constant prices, 2012-2022

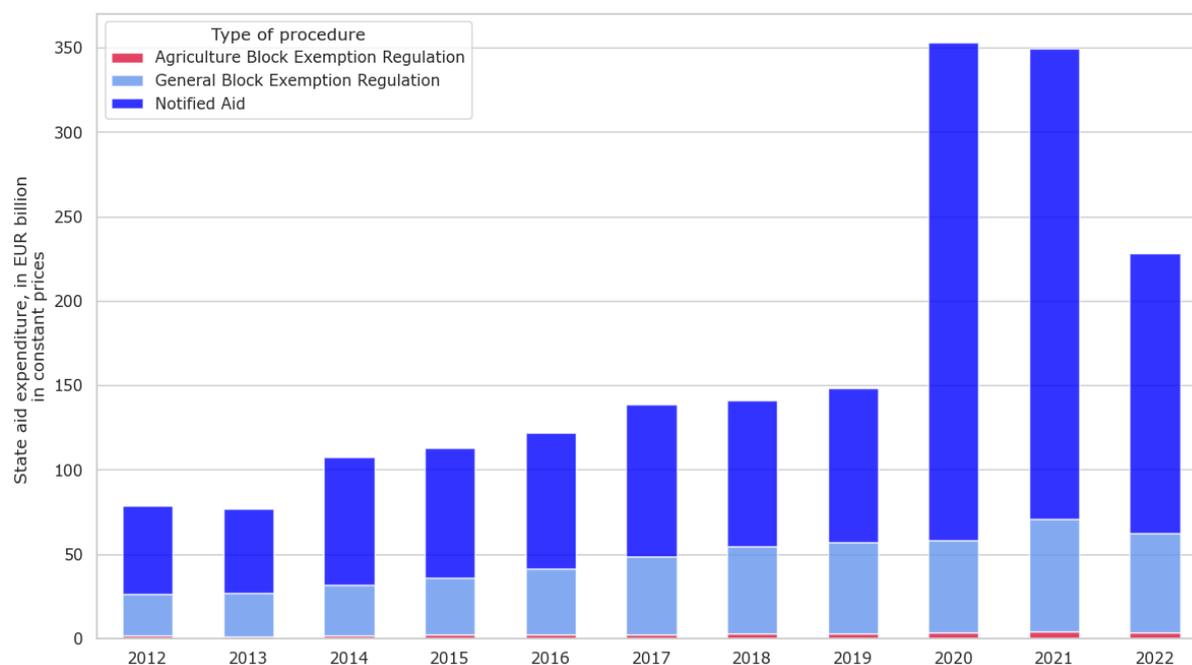


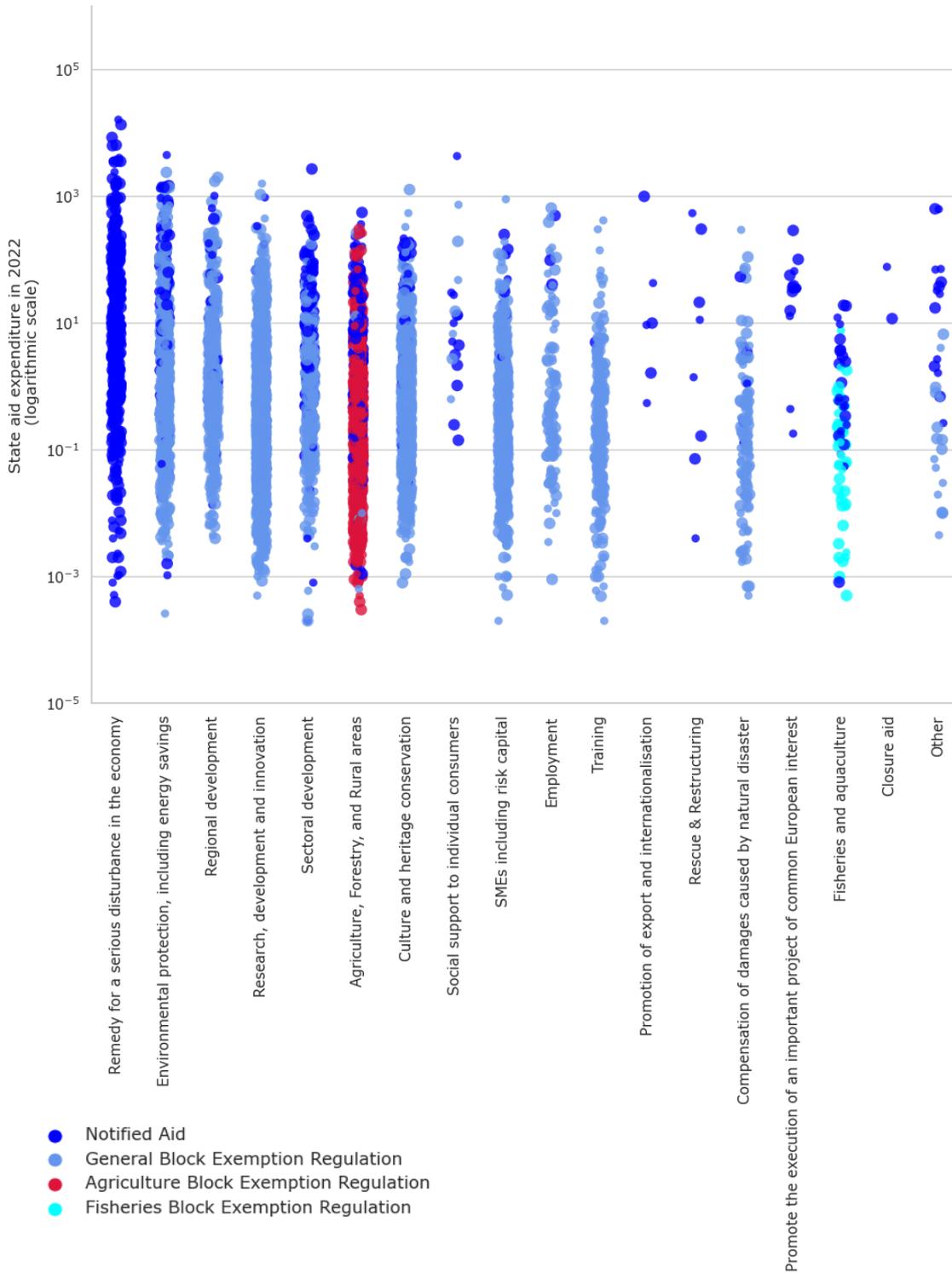
Table 2: Breakdown of State aid spending by type of procedure, in EUR billion in constant prices

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Agriculture Block Exemption Regulation	1.52	1.22	1.44	2.23	2.24	2.48	2.73	3.08	3.28	4.10	3.61
Fisheries Block Exemption Regulation	-	-	-	-	-	-	-	-	0.03	0.02	0.02
General Block Exemption Regulation	25.03	25.86	30.41	33.90	39.19	46.10	52.11	53.59	54.90	66.49	58.62
Notified Aid	52.29	49.77	75.43	76.39	80.65	90.13	86.23	91.60	294.71	279.09	165.74

Figure 67 illustrates the allocation of the largest measures by policy objective and procedure type. **GBER measures can be large.** We observe a significant presence of GBER schemes (light blue dots) with expenditure above 100 million in 2022, and even above 1 billion. GBER is also largely present across a large number of policy objectives, excluding the crisis cases which are all notified, social support to individual consumers, promotion of export and internationalisation, promote the execution of a project of common European interest, rescue and restructuring, and closure aid.

The three main objectives of GBER measures in the last six years are environmental protection and energy savings, research, development and innovation, and regional development (Figure 68). Environmental protection, including energy savings, increased compared to 2021 by 6%. After peaking in 2021, research, development and innovation decreased in 2022 by 42% in constant prices. Despite showing an increase in nominal terms, once adjusting for the inflation, aid expenditure for regional development under the GBER decreased by 5%.

Figure 67: Largest State aid schemes in term of expenditure in 2022, breakdown by type of procedure and policy objective (in EUR million)



N.B. Each point represents a State aid measure, and appears at the intersection of its category on the x-axis (in this figure, its main policy objective) and its expenditure on the y-axis. The expenditure is displayed with a logarithmic scale.

Figure 68: GBER State aid expenditure by policy objective in the EU, 2017-2022 in constant prices

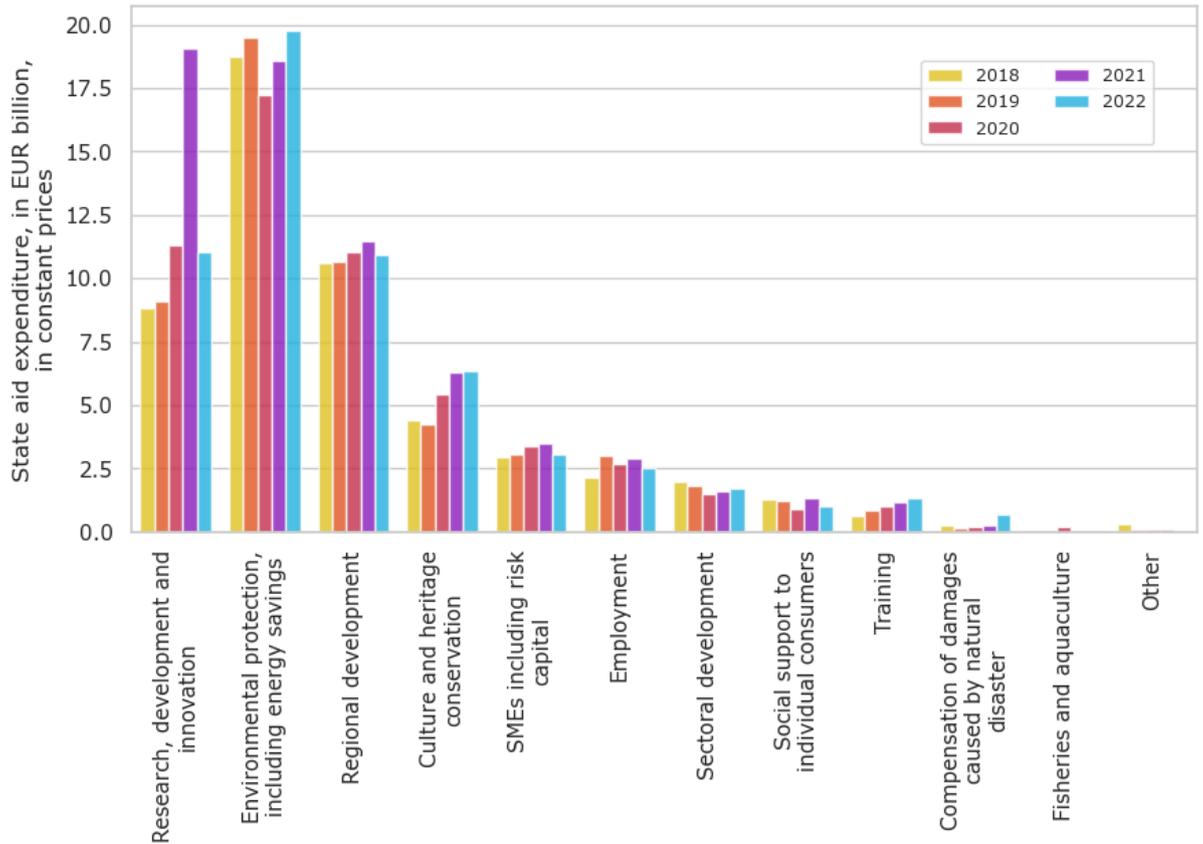
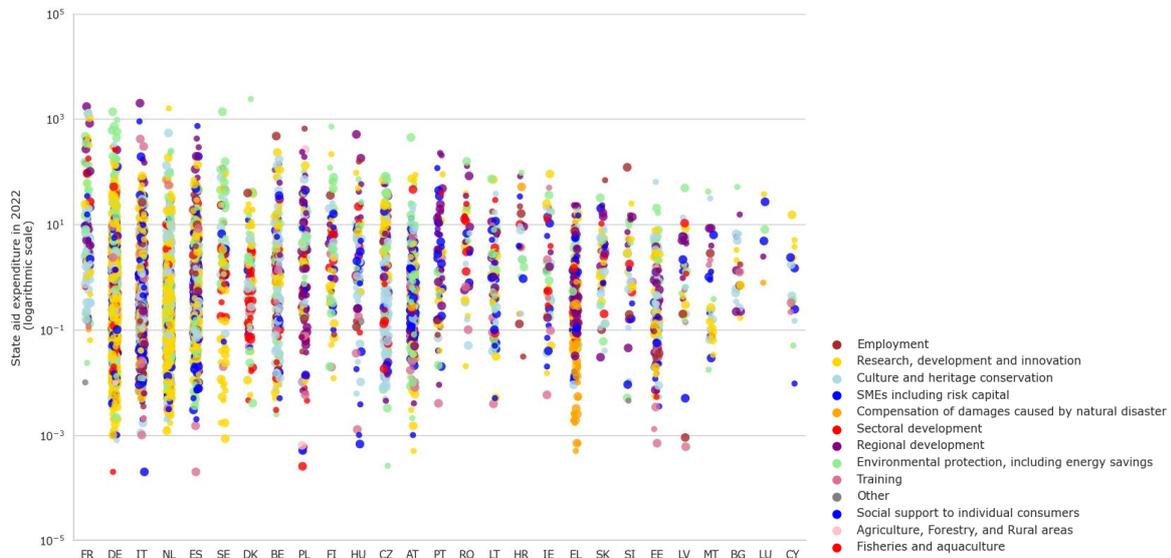


Figure 69 sheds some light on the **use of GBER measures made by Member States**. In general, Member States use the GBER for a large variety of policy objectives and for a great number of measures or varying sizes, as shown by the number of dots and the variety of colours. Some Member States have **one GBER measure whose order of magnitude is much larger than their other GBER measures**: the largest GBER schemes in Italy and France are regional development measures. In Germany, Sweden, Austria, Romania, and Latvia the largest GBER measure is an environmental protection scheme.

Figure 69: GBER schemes by expenditure in 2022, breakdown by Member State and policy objective (in EUR million)



N.B. Each point represents a GBER scheme and appears at the intersection of its category on the x-axis (in this figure, the Member State concerned) and its expenditure on the y-axis. The expenditure is displayed with a logarithmic scale. The size of the points slightly differs, for layout reasons only.

As regards different policy objectives, some political priorities for GBER spending can be identified.

Environmental protection including energy saving GBER schemes are applied by most of the Member States, via medium-size to large ones, with also some of the largest measures. The main Member States making use of GBER measures for this policy objective are Germany, Sweden, Denmark, Finland, Czechia and Austria.

Research and development including innovation GBER schemes (represented in yellow in the Figure 69) are mainly used, in terms of State aid spending, by the most advanced Member States in terms of research and innovation: Germany, the Netherlands, Belgium, Sweden, France and Italy. Most of these schemes are medium-sized.

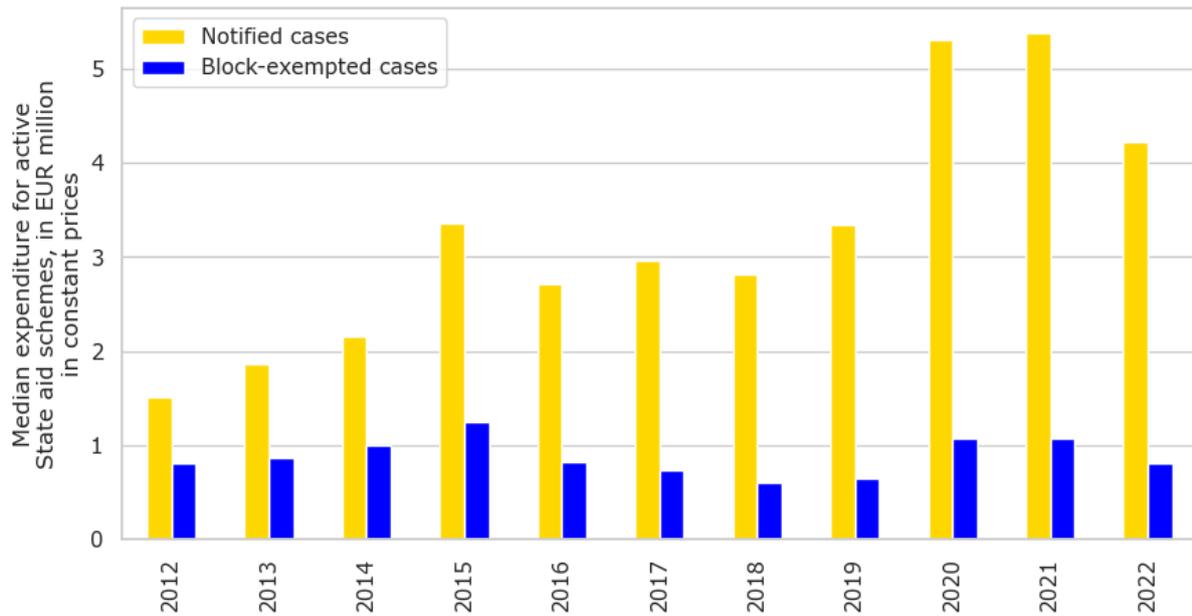
Regional development GBER measures are mainly implemented via large schemes in some of the largest Member States, in terms of both size and population: Spain, France and Italy, but also by Hungary.

More generally, the above classification of larges schemes illustrates the fact that Member States have adopted the GBER beyond expectations and are currently implementing large GBER schemes for a wide variety of objectives.

7.2 State aid control: “Big on big, small on small”

Figure 70 displays the median inflation-adjusted annual expenditure of notified and block-exempted measures between 2012 and 2022. Comparing the averages over time would not allow any conclusion about the impact of the State aid modernisation on the size of State aid schemes, while the medians remove the impact of particularly large measures that would otherwise artificially inflate the averages and thereby distort the overall picture.

Figure 70: Median expenditures of active State aid schemes from 2012 to 2022 in EUR million in constant prices



The median annual expenditure for notified measures is much higher than for block-exempted measures. Since 2014, the notified cases' median expenditure has increased from around EUR 2.2 million to EUR 3.4 million in 2019, with a jump to around EUR 5.3 million in 2020 and EUR 5.4 million in 2021 in the COVID-19 crisis years. In 2022, the **median spending for notified schemes** has decreased to **EUR 4.2 million**, still well above the 2019 level. Median spending for active State Aid schemes under GBER measures has been more stable, moving between EUR 0.6 (lowest value in 2018) and EUR 1.2 million (highest value in 2015). **In 2022, the median value for GBER schemes was around EUR 0.8 million.** Therefore, Figure 70 indicates that DG Competition State aid assessment increasingly focuses on the largest State aid measures.

8 Towards the green transition: focus point on environmental protection, renewables and energy savings

8.1 Policy context

The Commission has made the green transition a top political priority, with the aim of transforming the Union into a fair and prosperous society with a modern, resource-efficient and competitive economy, where there are no net emissions of greenhouse gases in 2050 and where economic growth is decoupled from resource use, while leaving no one behind. The climate ambitions of the Commission were reinforced in 2019 with the European Green Deal Communication⁷⁴, setting an objective of no net emissions of greenhouse gases by 2050, with a reduction by at least 55% by 2030 compared to 1990 levels⁷⁵. Those ambitious targets have been enshrined in the European Climate Law. The 'Fit for 55' package of legislative proposals supports the achievement of these targets and puts the Union on track to climate neutrality by 2050.

Delivering on the ambitious objectives of the green transition calls for a significant investment challenge, which requires mobilising both the private sector and public funds in a cost-effective manner. Competition policy, and State aid rules in particular, has an important role to play in enabling and supporting the Union in fulfilling its Green Deal policy objectives. The European Green Deal Communication specifically states that the State aid rules will be revised to take into account those policy objectives, to support a cost-effective and just transition to climate neutrality, and to facilitate the phasing out of fossil fuels, while at the same time ensuring a level-playing field in the internal market. The new Guidelines on State aid for climate, environmental protection and energy (CEEAG), applicable as from January 2022, reflect that revision.

This section takes stock of the implementation of the previous version of the guidelines, the Guidelines on State aid for environmental protection and energy (2022 CEEAG⁷⁶, 2014 EEAG⁷⁷ and the 2008 EEAG⁷⁸), as well as the expenditure under the GBER articles related to objectives of environmental protection and energy savings.

⁷⁴ Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions 'The European Green Deal', COM (2019) 640 final.

⁷⁵ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions 'Stepping up Europe's 2030 climate ambition Investing in a climate-neutral future for the benefit of our people', COM (2020) 562 final.

⁷⁶ Guidelines on State aid for climate, environmental protection and energy 2022 (2022/C 80/01)

⁷⁷ Guidelines on State aid for environmental protection and energy 2014-2020 (2014/C 200/01)

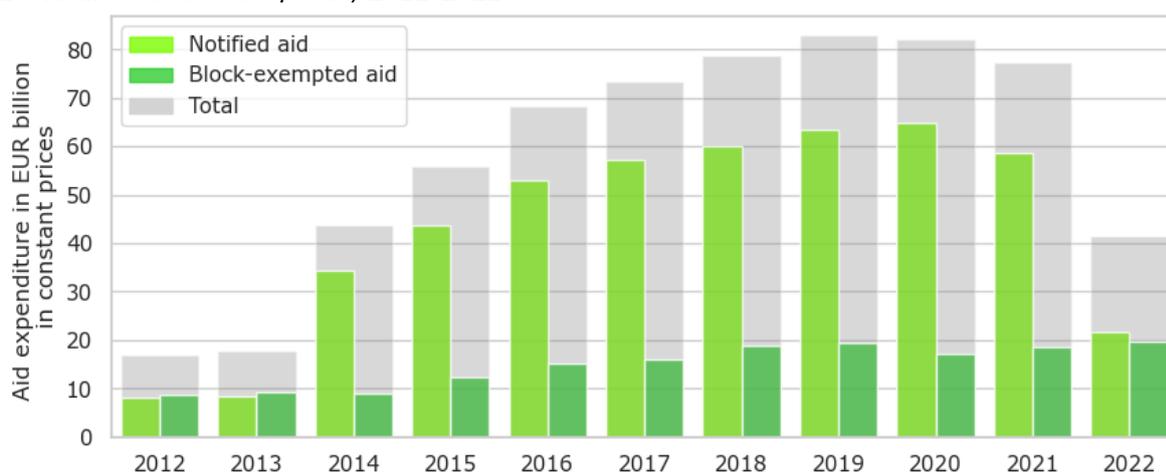
⁷⁸ Community guidelines on State aid for environmental protection 2008-2014 (2008/C 82/01)

8.2 A closer look at aid for environmental protection, renewables and energy savings

State aid subsidies targeting objectives of environmental protection more than doubled in 2014, when the 2014 EEAG came into force and the SAM took place, with the revised GBER rules for block-exempted measures (Figure 71). However, this large increase in the overall expenditure (from EUR 17.82 billion in 2013 to EUR 43.59 billion in 2014) is almost entirely due to the notified measures (from EUR 8.46 billion in 2013 to EUR 34.51 billion in 2014). However, despite the Union’s increasingly ambitious environmental protection objectives, total State aid expenditure in this field (including crisis and non-crisis aid) had slightly decreased already in 2020 (EUR 82.11 billion, -0.8% adjusting for the inflation compared to the previous year) and plummeted in 2021 (EUR 77.29 billion, -5.9%) and then in 2022 (EUR 41.10 billion, -46.3% compared to the peak in 2019).

While looking at the expenditure under GBER measures versus notified measures, the former increased to EUR 19.76 billion in 2022 (+6.4% since 2021). Regarding notifications, after the sharp increase in 2014, expenditure under the EEAG kept growing, reaching EUR 64.9 in 2021. However, in 2022, the amount of aid spent under notified measures (EUR 21.76 billion) is almost comparable to the amount spent under the block-exempted ones in 2022.

Figure 71: Total State aid expenditure for Environmental protection including energy savings, in EUR billion in constant prices, 2012-2022

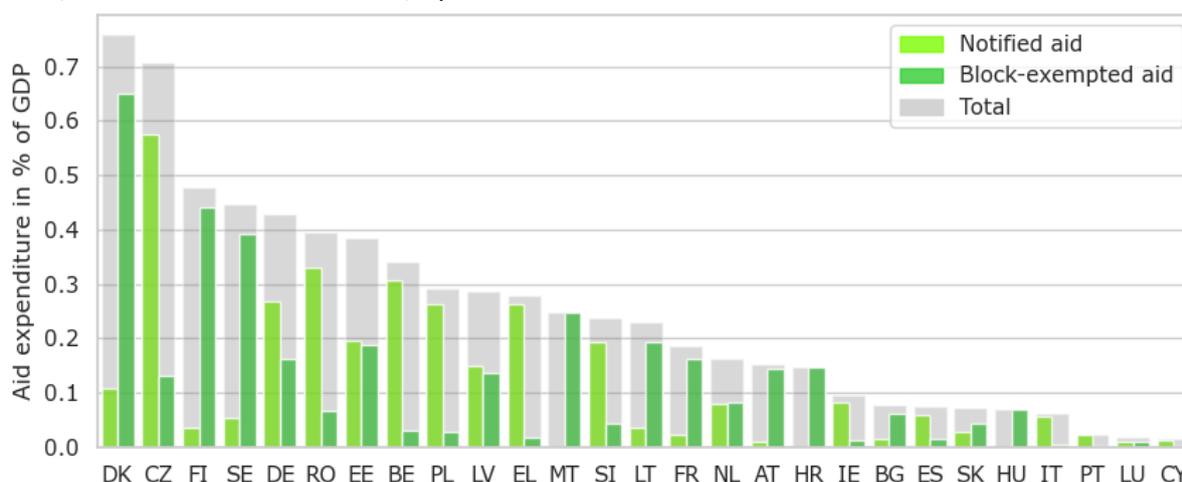


Among the largest spenders in relative terms for environmental and energy projects (as compared to the size of national GDP) in 2022, are Denmark (0.76% of its own GDP) and Czechia (0.71%). However, while Denmark made use predominantly of block-exempted aid (0.65% of GDP and 86% of the Danish aid expenditure for this objective), Czechia mainly made use of notified measures (0.57% of national GDP and 81% of the total aid expenditure for this objective).

Belgium, Greece, Italy, Poland and Portugal spent more than 90% of environmental aid under notified measures, and other nine Member States (Cyprus, Czechia, Estonia, Germany, Ireland, Latvia, Romania, Slovenia, Spain) spent more than half. On the contrary, Hungary and Malta granted 'green aid' exclusively under block-exempted measures.

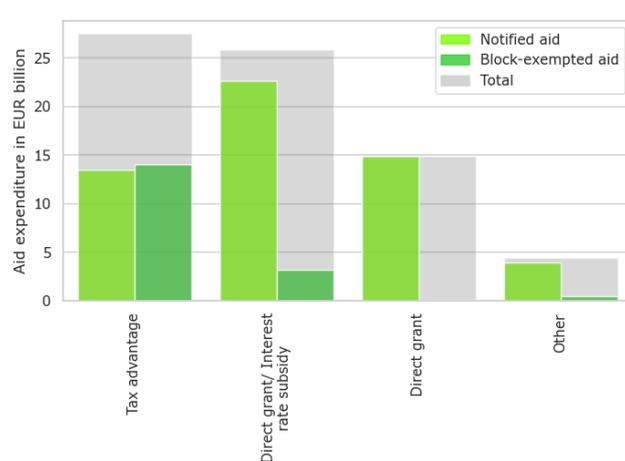
Cyprus, Luxembourg and Portugal are the Member States that spend the least on environmental objectives in proportion to their GDP, with a total expenditure ranging between to 0.02% and 0.01% of 2022 national GDP. This means that the Member State spending the least, Cyprus, spends 0.74 percentage points of GDP less than the Member State spending the most, Denmark.

Figure 72: Total State aid expenditure for Environmental protection including energy savings in 2022, as % of national 2022 GDP, by Member State



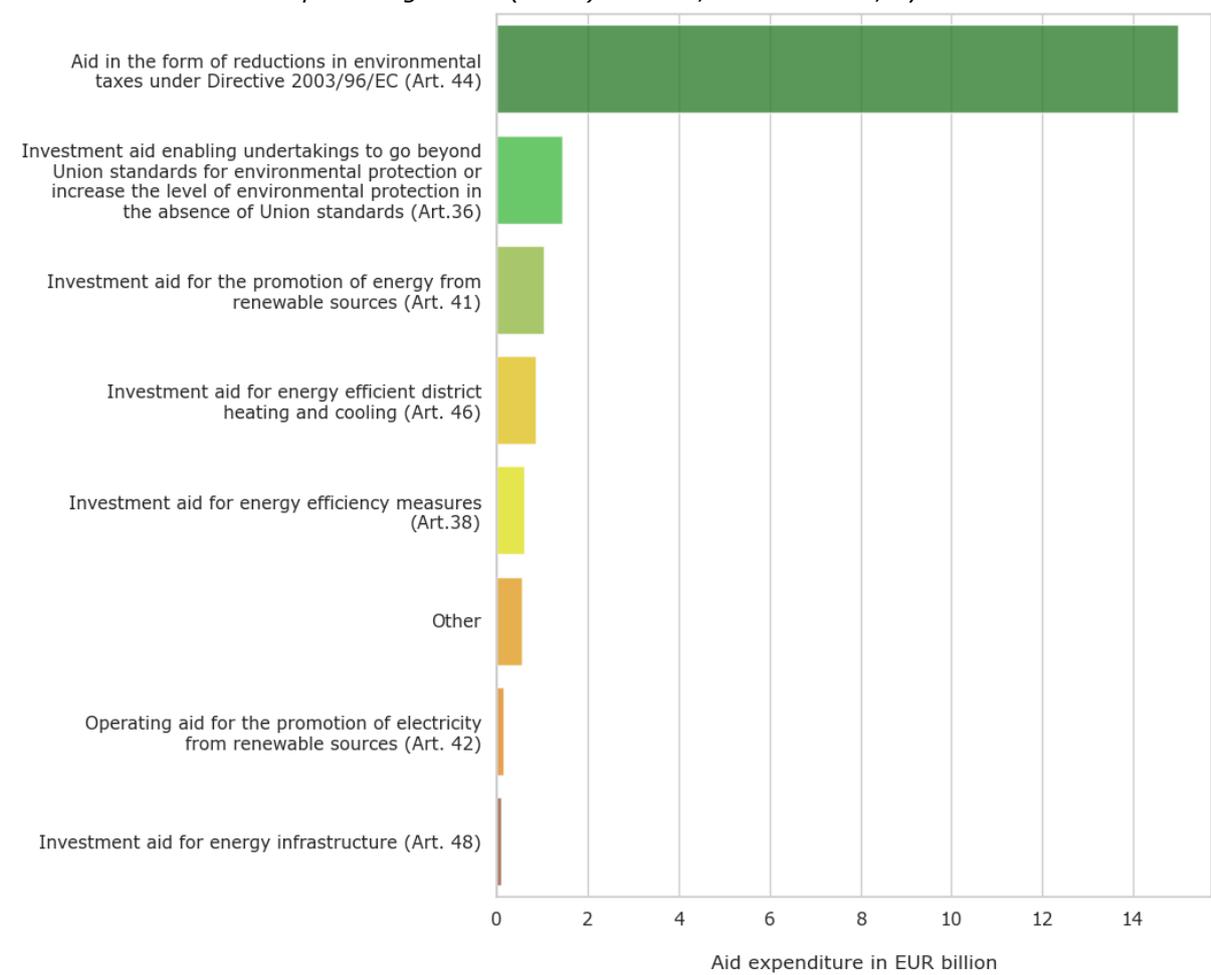
In terms of aid instruments applied to grant subsidies for environmental protection, notified aid takes mostly the form of direct grants or interest rate subsidies, while block-exempted aid takes mostly the form of tax advantage (Figure 73).

Figure 73: Total State aid expenditure for Environmental protection including energy savings in 2022, in EUR billion, by aid instrument



Focusing on the solely GBER measures, as shown in Figure 74, State aid expenditure for environmental protection projects in 2022 is highly concentrated under one GBER article entailing tax reductions or exemptions for energy intensive users, Article 44 – Aid in the form of reductions in environmental taxes under Directive 2003/96/EC' (2014 GBER). This article absorbs around EUR 14.98 billion in 2022 out of total EUR 19.76 billion spent for environmental aid measures approved under the GBER.

Figure 74: Total State aid expenditure for Environmental protection including energy savings under the General Block-Exemption Regulation (GBER) in 2022, in EUR billion, by GBER article



9 Digital Europe: State aid to deploy broadband networks

9.1 Policy context

Developing a modern internet infrastructure has been at the core of the European agenda since 2010. In its first "Digital Agenda for Europe"⁷⁹, the European Commission identified the 10-year 2020 strategy, that was further expanded in the 2016 "Connectivity for a European Gigabit Society measures", which identified the connectivity needs to be achieved by 2025 to build a European Gigabit society, namely: (i) all European households should have internet connectivity of at least 100 Mbps download speed, upgradable to 1 Gbps, (ii) socio-economic drivers such as schools, hospitals and public administration as well as digitally intensive enterprises should benefit from Gigabit connectivity (1 Gbps upload and download); (iii) all urban areas and all major terrestrial transport paths should be covered by an uninterrupted 5G network. In February 2020, the Commission published the EU digital priorities, among which the Communication on Shaping Europe's Digital Future and recalled that connectivity to achieve the EU 2025 objectives remains the most fundamental building block of the digital transformation of Europe. In 2021, the strategy was complemented by the 10-year 2030 Digital Compass Communication, which envisages that, by 2030, all households in the EU should be covered by a Gigabit network, and all populated areas should be covered by 5G. The Digital Decade Policy Programme⁸⁰ underlines that societal needs for upload and download bandwidth are constantly growing. It states that by 2030, networks with Gigabit speeds should become available at accessible conditions for all those who need or wish to have such capacity.

High quality electronic communications infrastructure is crucial for social cohesion and a competitive and sustainable economy, therefore State aid control in the electronic communications sector, including for broadband rollouts, plays an important role in supporting a coherent investment strategy and reaching the digital transition goals. In 2013, the Commission adopted the "EU Guidelines for the application of State aid rules in relation to the rapid deployment of broadband networks"⁸¹ (the 2013 Broadband Guidelines) to ensure Member States use public financing to finance broadband deployment in line with EU competition and State aid rules. In December 2022, the Commission adopted revised Broadband guidelines⁸² which entered into force on 1 February 2023 (2023 Broadband Guidelines). The 2023 Broadband Guidelines set out the rules under which the Commission will assess State aid measures notified by Member States to support the deployment and take-up of broadband networks in the EU. The new rules provide an up-to-date framework reflecting technological, regulatory and market developments and contribute to the EU's strategic objectives of ensuring gigabit connectivity for everyone and 5G coverage everywhere by the end of the decade, which is essential to achieve the digital transition of the Union. In particular, the 2023 Broadband Guidelines update the rules for public support to fixed networks to reflect the latest technological and market developments and introduce a new assessment framework for the deployment of mobile (including 5G) networks. They also explain how public support can be used to incentivise the take-up of broadband services. By simplifying, clarifying and updating certain conditions, the 2023 Broadband Guidelines facilitate their practical application and aim to help Member States meet the ambitious EU connectivity targets, at the least possible cost for taxpayers and without undue distortions of competition in the Single Market, to the benefit of consumers, businesses and the public sector.

The provisions of the 2023 Broadband Guidelines are complemented by the GBER, which lays down ex ante compatibility conditions on the basis of which Member States can implement State

⁷⁹ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, COM (2010) 245 final, A Digital Agenda for Europe

⁸⁰ Decision (EU) 2022/2481 of the European Parliament and of the Council of 14 December 2022 establishing the Digital Decade Policy Programme 2030, OJ L 323, 19.12.2022, p. 4–26.

⁸¹ Communication from the Commission: EU Guidelines for the application of State aid rules in relation to the rapid deployment of broadband networks, OJ C 25, 26.1.2013, p. 1–25.

⁸² Communication from the Commission: Guidelines on State aid for broadband networks 2023/C 36/01 C/2022/9343 OJ C 36, 31.1.2023, p. 1–42.

aid measures without prior notification to the Commission. In July 2021, the Commission adopted an extension of the scope of the GBER⁸³ which was amended in March 2023 to further facilitate and speed up the digital transition. The revised provisions concerning broadband networks align the GBER with the 2023 Broadband Guidelines, and facilitate, among others, State aid measures that support the digital transition, notably aid for fixed and mobile broadband networks, aid for backhaul networks, aid granted through connectivity vouchers, and aid for certain projects of common interest in the area of trans-European digital connectivity infrastructure financed under Regulation (EU) 2021/1153 or awarded a Seal of Excellence quality label under that Regulation.

In addition, support for the digital transition is also central to the Recovery and Resilience Facility (RRF). Measures within the RRF have to comply with the State aid framework and be notified to the Commission unless they fall under the GBER or an existing authorized scheme. The RRF provides both loans and grants by frontloading financial support for the crucial first years of the recovery (a total of EUR 672.5 billion, distributed to MS in different measure, with at least 20% earmarked for digital). Overall, by January 2023, 21 Member States have included reforms and investments related to connectivity in their Recovery and Resilience Plans (RRPs). The cost of these reforms and investments was estimated at EUR 16.5 billion, representing approximately 3.3% of the total estimated RRF expenditure of the 26 approved RRFs, and 12% of total estimated digital expenditure. For the 21 Member States that have included connectivity in their plans, it corresponds to approximately 3.6% of the total estimated RRF expenditure⁸⁴.

9.2 A closer look at broadband aid

Between 2014 and 2022 the Commission has approved under State aid decisions a total aid amount of EUR 61.01 billion, while the total aid amount communicated by Member States under the GBER for the same period was an overall budget of EUR 7.39 billion, bringing the full amount of aid approved to EUR 68.40 billion. Out of this full amount, in the same period (2014 – 2022), Member States have spent EUR 17.45 billion (in current prices).

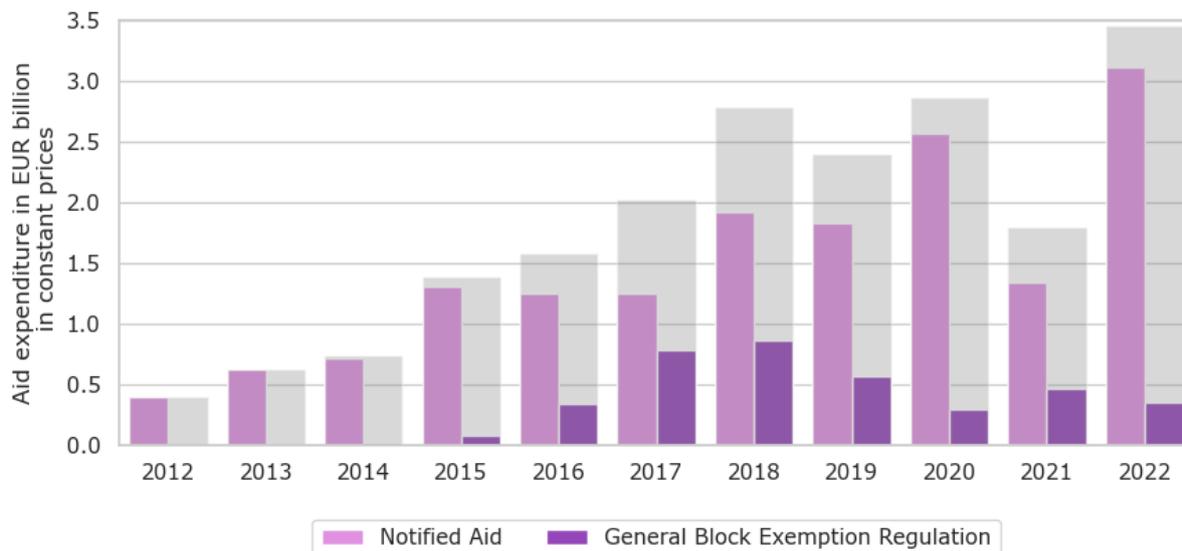
In 2022 only, the expenditures reported amount to EUR 3.46 billion on 59 broadband measures, a 92% increase compared to the expenditure in 2021 (EUR 1.8 billion, in constant prices). 10% of the 2022 expenditure (corresponding to EUR 347 million) was reported by Member States as spent under Commission decisions and 90% (EUR 3.11 billion) under the main relevant provision in GBER, i.e. Article 52. However, when looking at the number of active measures for which spending was reported in 2022, block exempted measures are around 53% of the total broadband active cases (31 active GBER measures against 28 notified measures).

Figure 75 shows the evolution of State aid expenditure from 2012 to 2022 for all the EU27 Member States, distinguishing between notified measures adopted under the 2013 Broadband Guidelines and the GBER measures. The provision of subsidies under the GBER grew since its introduction in 2014, reaching the highest value in 2018 (EUR 866 million, in constant prices). The 2017-2018 spike is mostly due to the implementation of broadband measures co-funded by European funds over the period 2014-2020. In 2022, notified measures reached a peak (EUR 3.11 billion), while after a slight increase in 2021, expenditures under GBER measures decreased in 2022 compared to 2021 (EUR 347 million -25% compared to 2021).

⁸³ Commission Regulation (EU) 2021/1237 of 23.7.2021 amending Regulation (EU) No 651/2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty (Text with EEA relevance), OJ L 270, 29.7.2021, p. 39–75.

⁸⁴ https://ec.europa.eu/economy_finance/recovery-and-resilience-scoreboard/assets/thematic_analysis/scoreboard_thematic_analysis_connectivity.pdf

Figure 75: Total State aid expenditures on Broadband measures, 2012-2022, EU27 Member States, EUR billion, constant prices



Looking at the number of broadband cases for which expenditure was reported (Figure 76), the data shows a steady growth of active block-exempted measures since their introduction in 2014 (6 active measures) until 2018 and 2019 (37 active measures). In the same time frame, the number of notified cases temporarily decreased after 2014 (minimum in 2019 at 19 measures). In 2020, the number of active block-exempted measures decreased to 32, while the number of notified measures increased to 27. In 2021, the number of active block-exempted measures (42) was more than double the number of notified cases (20), while in 2022 the number of active broadband measures under GBER (31) was almost the same as the one of notified measures (28). Overall, trends in terms of number of cases and broadband expenditure, while showing some variations, seem to be reasonably constant overtime, considering specificities of the sector and market.

Figure 76: Number of broadband measures for which expenditure was reported, 2012-2022, EU27 Member States

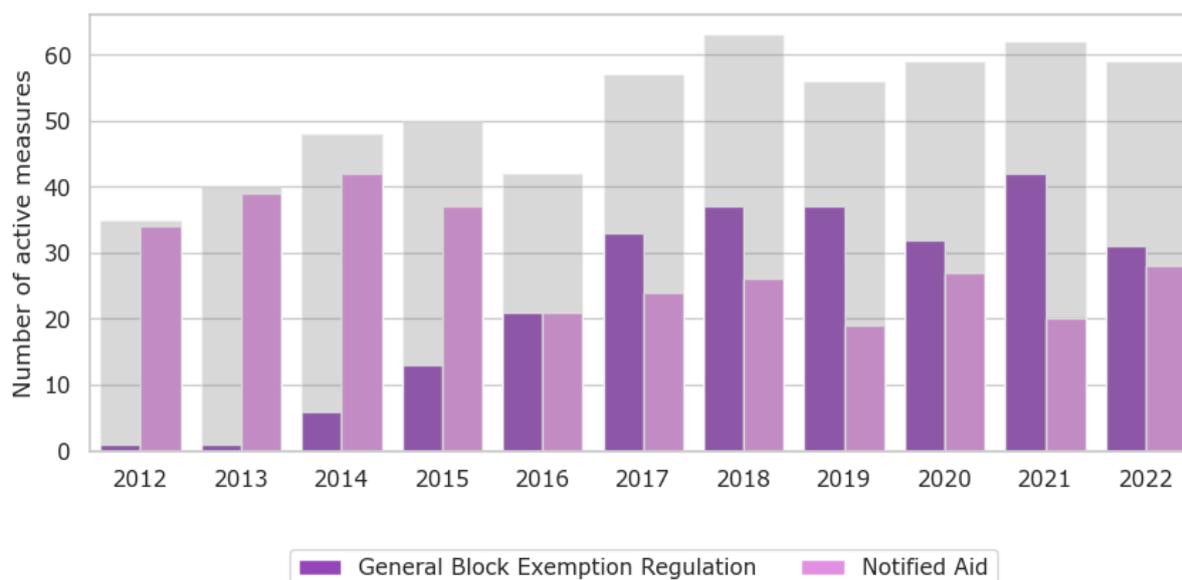
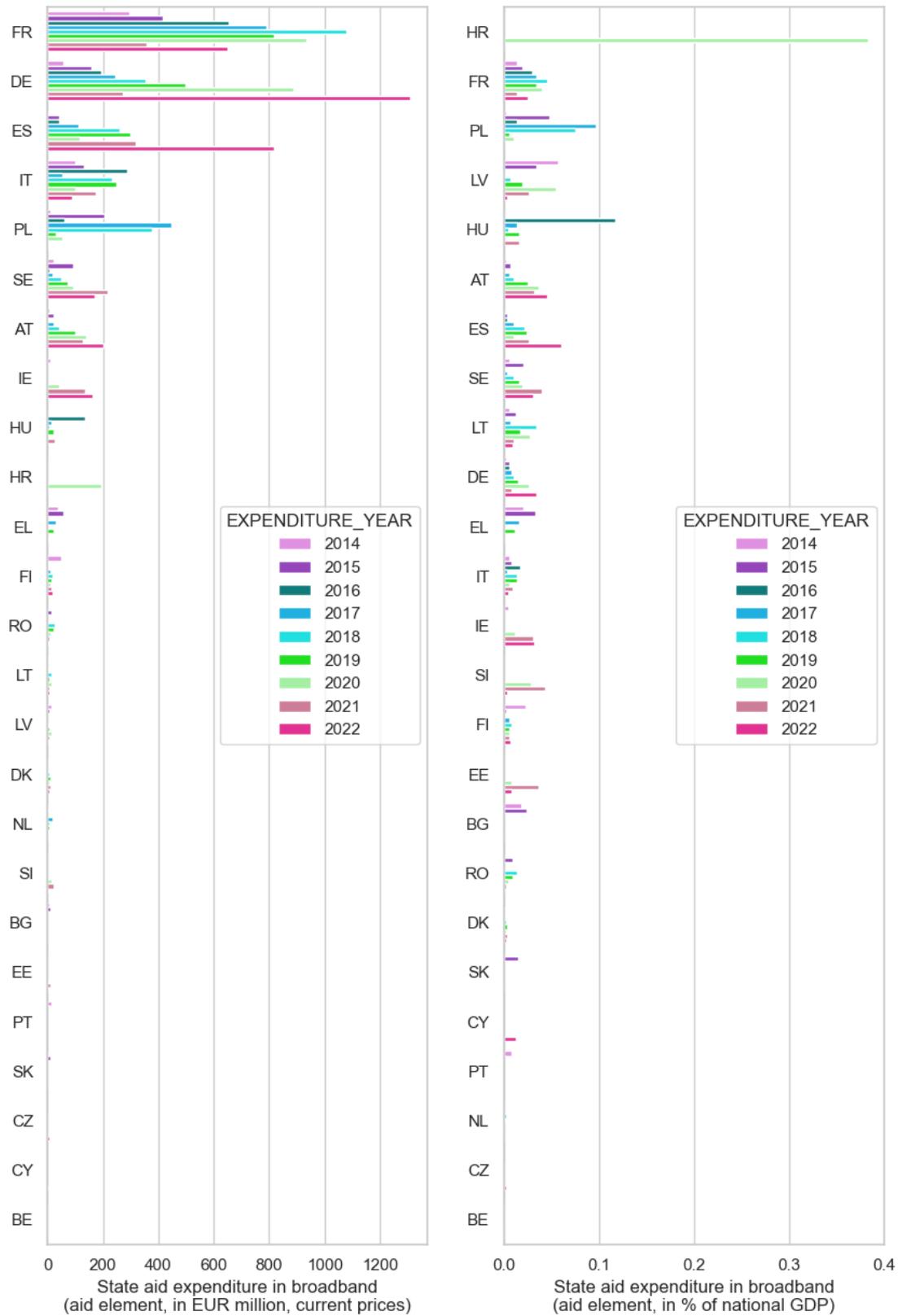


Figure 77: State aid expenditure for broadband, 2014-2022, EU27 Member States⁸⁵



⁸⁵ Reported broadband expenditure for Belgium, Czechia, Cyprus, Estonia, Luxembourg, Malta and Slovakia is below EUR 10 million (aid element) over the period 2014-2021.

In absolute values, **France** and **Germany** have been the largest spenders over the years 2014-2022. **Germany** is the Member State spending the most for broadband in 2022 (EUR 1.31 billion), followed by **Spain** (EUR 818 million) and **France** (EUR 650 million). In relative terms, **Spain** is the Member State that has spent the most compared to its GDP (0.06%), followed by **Austria** (0.05%) and **Germany** (0.03%).

When considering the cumulative period 2014-2022, **Croatia** is the largest spender in relative terms, with all the expenditure concentrated in 2020. It is followed by **France**, with a peak of 0.08% of national GDP in 2018, and **Poland**, which reached almost 0.1% of GDP in 2017.

10 Twin transition: State aid to boost industrial innovation and global technological leadership

10.1 Policy context

The European industrial strategy, a cornerstone initiative aimed at navigating the dual transitions towards a green and digital economy, was introduced by the European Commission first on 10 March 2020, then updated one year after as the initial unveiling coincided with the declaration of the COVID-19 pandemic, presenting an unforeseen challenge. The review was aimed to ensure that its industrial ambition would have taken full account of the new circumstances following the COVID-19 crisis and helps to drive the transformation to a more sustainable, digital, resilient and globally competitive economy.

The strategy seeks to enhance global competitiveness of the European industry, foster resilience of the production in Europe, and promote open strategic autonomy of the EU.

Among the key elements of the strategy, emphasis is given to the crucial role of mobilizing private investment and public finance, particularly in addressing market failures hindering the deployment of innovative technologies.

The State aid framework sets out ample opportunities for Member States to provide public support to industry to boost innovation and global technological leadership.

For example, ambitious research, development and innovation activities by industry which, due to the high risks involved would not occur in the absence of public support, are facilitated by State aid rules both under the RDI Framework, which was revised in 2022, and the General Block Exemption Regulation (GBER).

The Commission has also diverged in 2022 new Guidelines on State aid for Climate, Environmental Protection and Energy (CEEAG), which facilitate investments by Member States to accelerate the achievement of the EU Green Deal objectives in a cost-effective way. The GBER as well, following its more recent amendment in June 2023, provides even more flexibility for Member States to implement support measures in sectors that are key for the transition to climate neutrality and to a net-zero industry.

Another State aid tool that has been deployed for the purpose of mobilising public contribution and stimulating private crowd-in, concerns Important Projects of Common European Interest (IPCEIs). IPCEIs enable Member States to pool financial resources, catalyse investments, and facilitate cross-border collaborations, addressing market failures in the process.

Additionally, the European Chips Act takes prominence in response to global semiconductor shortages. This legislative initiative aims to fortify Europe's competitiveness and resilience in semiconductor technologies, aligning with the broader goals of the digital and green transitions.

Furthermore, the Regional State Aid Guidelines (RAG), by addressing regional disparities and challenges, contribute to the cohesion objectives of the Union, ensuring a level playing field across Member States, but also provide increased possibilities for Member States to support regions facing transition or structural challenges.

Finally, another instrument boosting the twin transition and investments in strategic sectors is the Temporary Crisis and Transition Framework (TCTF) and specifically its "transition sections". Applicable until 31 December 2025, Member States may grant aid to foster the transition to a net-zero economy. Thus, aid may be granted to (i) accelerate the roll-out of renewable energy, storage and renewable heat relevant for REPowerEU (measures under Section 2.5) and (ii) decarbonise industrial production processes (measures under Section 2.6). In addition, Member States may also grant aid to accelerate investments in key sectors for the transition towards a net-zero economy, enabling investment support for the manufacturing of strategic equipment, namely batteries, solar panels, wind turbines, heat-pumps, electrolysers and carbon capture usage and storage as well as for production of key components and for production and recycling of related critical raw materials (measures under Section 2.8).

The following sections explore the main trends in State aid budgets and spending when already available to foster the twin green and digital transition since 2019 under the different legal basis along key dimensions, including by Member State and instrument.

10.2 A closer look at aid fostering the twin transition

10.2.1 Aid for R&D&I

Most State aid for research, development and innovation is granted by Member States nowadays under the General Block Exemption Regulation. The notification threshold for aid to R&D&I was significantly increased following the most recent amendment to the GBER, adopted in June 2023.

When aid exceeds the GBER thresholds, it is notified to the Commission for assessment under the RDI Framework. In recent months, the Commission approved several such measures for technologies that are of direct relevance for the twin transition.

In August 2023 the Commission approved EUR 1.5 billion aid from France⁸⁶ to the company ProLogium for developing new generations of batteries for electric vehicles using the 'solid state' technology, which uses solid instead of liquid electrolyte for batteries that have a higher energy density and are safer for consumers than conventional lithium-ion batteries. And in October 2023, approximately EUR 650 million aid⁸⁷ from France to the company Verkor was approved, also to support a R&D project in the area of batteries for electric vehicles.

Furthermore, the Commission approved under the R&D State aid rules (i) a EUR 50 million French aid measure⁸⁸ to support a research and development project for small modular reactors in December 2022; (ii) a EUR 179.5 million Croatian aid measure⁸⁹ to support the development of an urban mobility service based on a fully autonomous electric vehicle (so-called: robo-taxi) in May 2023; and (iii) a EUR 52.3 million Italian aid measure⁹⁰ to support the development of a fully digitalised factory model for the production and life cycle management of complex aerospace components.

10.2.2 Aid for environmental protection

The CEEAG, adopted by the Commission at the beginning of 2022, create a flexible enabling framework to help Member States provide the necessary support to reach the Green Deal objectives in a targeted and cost-effective manner. These rules cover many different categories of aid, including to renewable energy and clean mobility.

Industrial decarbonisation is key to reach the Green Deal objectives while boosting competitiveness. Since 2022, the Commission approved under the CEEAG several State aid measures aiming at the decarbonisation of industry, including some measures supporting the decarbonisation of large steel and chemical plants through the uptake at unprecedented large scales of clean hydrogen-based technologies replacing the traditional ones based on fossil fuels. For example, the Commission approved several aid measures to promote such investments by ArcelorMittal (in Belgium⁹¹, France⁹², Germany⁹³ and Spain⁹⁴) or by ThyssenKrupp⁹⁵ and Salzgitter⁹⁶, both in Germany.

⁸⁶ SA.106740 - Aid to ProLogium for the project "Prometheus"

⁸⁷ SA.106361 - Aid to Verkor for the Veymont project

⁸⁸ SA.100338 - Aide au soutien de la réalisation de la phase Avant-Projet Sommaire (APS) du projet Small Modular Reactor (SMR) dit « Nuward ».

⁸⁹ SA.101759 - Development and implementation of a completely new urban mobility system based on new autonomous electric vehicle technology

⁹⁰ SA.104370 - Aid to Leonardo S.p.A. for the implementation of the research and development project 'NEMESI'

⁹¹ SA.104897 - Project ArcelorMittal (Ghent)

⁹² SA.104903 - ArcelorMittal France

⁹³ SA.104898 - RRF - ArcelorMittal (Bremen & Eisenhüttenstadt)

Besides individual measures, the Commission also approved large aid schemes, notably for EUR 1 billion in Slovakia⁹⁷ and EUR 4 billion in Germany⁹⁸, that aim at deep decarbonisation of energy-intensive sectors while keeping aid and competition distortions limited to the minimum necessary also through the use of novel aid instruments like carbon contracts for difference.

The Commission also approved under the CEEAG a scheme notified by Denmark⁹⁹, with a total budget of around EUR 1.1 billion, aiming at promoting the roll-out of Carbon Capture and Storage (CCS) technologies used to reduce CO₂ emissions that are released in the atmosphere and achieve deeper decarbonisation of industrial processes.

10.2.3 Aid for IPCEIs

As of the end of 2023, the Commission has approved aids in the context of seven Important Projects of Common European Interest (IPCEIs): two in the microelectronics, two in the batteries, two in the hydrogen and one in the cloud computing value chains.

All seven IPCEIs are large EU-wide cross-border projects that will deliver over years. The Member States participating to these projects are expected to provide up to approximately EUR 27.9 billion in funding, which in turn is expected to unlock an additional EUR 50 billion in private investments.

Two IPCEIs are aimed at supporting the microelectronics value chain. The first IPCEI, approved in 2018, envisages aid by 5 Member States of up to EUR 1.9 billion, as well as another EUR 6.5 billion of private investments. As a result of the innovations achieved in the sector in the first 2018 IPCEI, new advanced chip technologies are now reaching the market.

The second IPCEI on Microelectronics/Communication Technologies was approved in June 2023. It was jointly prepared and notified by fourteen Member States, and will provide up to EUR 8.1 billion in funding. The public funding is expected to unlock an additional EUR 13.7 billion in private investments.

The first IPCEI on batteries, approved in 2019, was jointly prepared and notified by seven Member States, and will provide up to EUR 3.2 billion in funding. The public funding is expected to unlock an additional EUR 5 billion in private investments. The second IPCEI on batteries ('EuBatIn'), approved in 2021, was jointly prepared and notified by twelve Member States, and will provide up to EUR 2.9 billion in funding. The public funding is expected to unlock an additional EUR 9 billion in private investments, i.e., more than three times the public support.

These projects are widely recognised to have helped kick-starting the battery value chain in Europe, which is recognised as a success story, with major private investments. Also thanks to the State aid granted, since 2017 when the Commission launched the European Battery Alliance, the EU went from a virtually non-existing industry to the current 10 gigafactories, with 20 more in the pipeline. On current trends, soon two thirds of the batteries we need will be produced in Europe. In this context, there are many success stories. For instance, a battery joint venture between Stellantis and Total/SAFT, focusing on Lithium ion battery cell technologies, has finished its R&D activities and is expected to start production by mid-2023, aiming at producing one million batteries annually.

Two IPCEIs supporting the hydrogen value chain have been approved by the Commission in 2022. The first IPCEI, approved in July, envisages aid by 15 Member States of up to EUR 5.4 billion of aid, as well as another EUR 8.8 billion of private investments. It will boost hydrogen technologies' developments (especially electrolyzers).

The second IPCEI, approved in September, covers EUR 5.2 billion in public funding from 13 Member States, which is expected to unlock additional EUR 7 billion in private investments. It will aim at the construction of 3.5 GW hydrogen-generation capacity, among others, resulting in an output of approximately 340,000 tons of renewable and low-carbon hydrogen per year that will help decarbonising some of the most polluting sectors in Europe. This will contribute to the REPowerEU goals.

⁹⁴ SA.104904 - ENER - CEEAG on Hydrogen 2022 - Industry Wave

⁹⁵ SA.105244 - Aid to ThyssenKrupp for project tkH2Steel

⁹⁶ SA.104276 - Aid to Salzgitter for project SALCOS stage I

⁹⁷ SA.109989 - TCTF: State aid scheme to provide exceptional investment aid in sectors of strategic for the transition to a climate-neutral economy

⁹⁸ SA.104880 - RRF - Climate Protection Contracts support scheme

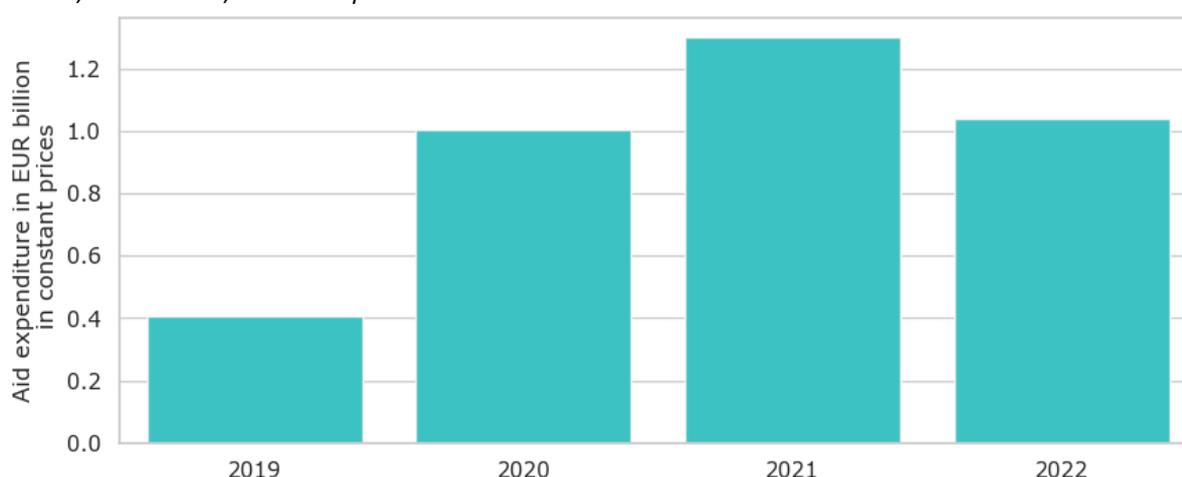
⁹⁹ SA.102777 - State aid scheme for Carbon Capture and Storage in Denmark

In December 2023 the Commission also approved an IPCEI on Next Generation Cloud Infrastructure and Services, which consists of 19 projects across 7 Member States, for a total of EUR 1.2 billion in aid. The public funding is expected to unlock further EUR 1.4 billion in private investment.

Between 2019 and 2022, the overall aid element of the expenditures reported for the IPCEI measures amounted to EUR 3.75 billion in constant prices. In 2022 only, the expenditures reported amounted to EUR 1.04 billion.

In October 2023, the Commission established the Joint European Forum for Important Projects of Common European Interest (JEF-IPCEI). It is an initiative to gather the Commission and Member States' representatives to substantially ameliorate the effectiveness and efficiency of IPCEI process and identify areas of strategic interest for potential future IPCEIs in alignment with Union strategies, i.e. the green and digital transitions.

Figure 78: Total State aid expenditures on IPCEI measures, 2019-2022, participating Member States, EUR billion, constant prices



As shown in Figure 79, in 2019 around EUR 407.97 million (in constant prices) were spent under the IPCEI on Microelectronics. This measure continues to represent the vast majority of expenditure in 2020. Of the total EUR 1 billion spent for IPCEI measures, around 94% (EUR 943.75 million) were spent for IPCEI on Microelectronics, while 6% (EUR 57.87 million) were spent for the first IPCEI on batteries.

The expenditure for the IPCEI on Microelectronics declined in 2021 and 2022 (EUR 324.6 million and EUR 217.17 million, respectively). This accounted for 25% of the expenditure on IPCEIs in 2021 and 21% in 2022.

In 2021, together with the peak of the implementation of first IPCEI on batteries (EUR 955.22 million, in constant prices) began also the implementation of the IPCEI 'EuBatIn' (EUR 17.7 million).

In 2022, started the implementation of the two hydrogen value chain: IPCEIs, IPCEI Hy2Tech and IPCEI Hy2Use. They accounted for the 31% (EUR 325 million) and around the 6% (EUR 65.2 million) of the expenditure for IPCEI, respectively.

Figure 79: Total State aid expenditures on IPCEI measures, 2019-2022, by measure, EUR billion, constant prices

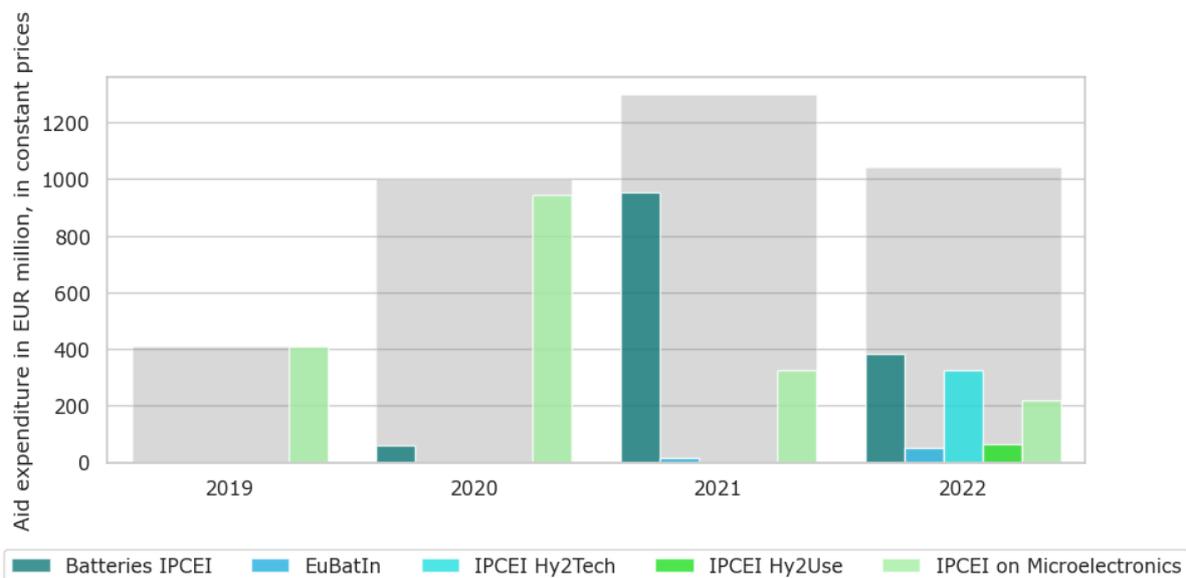
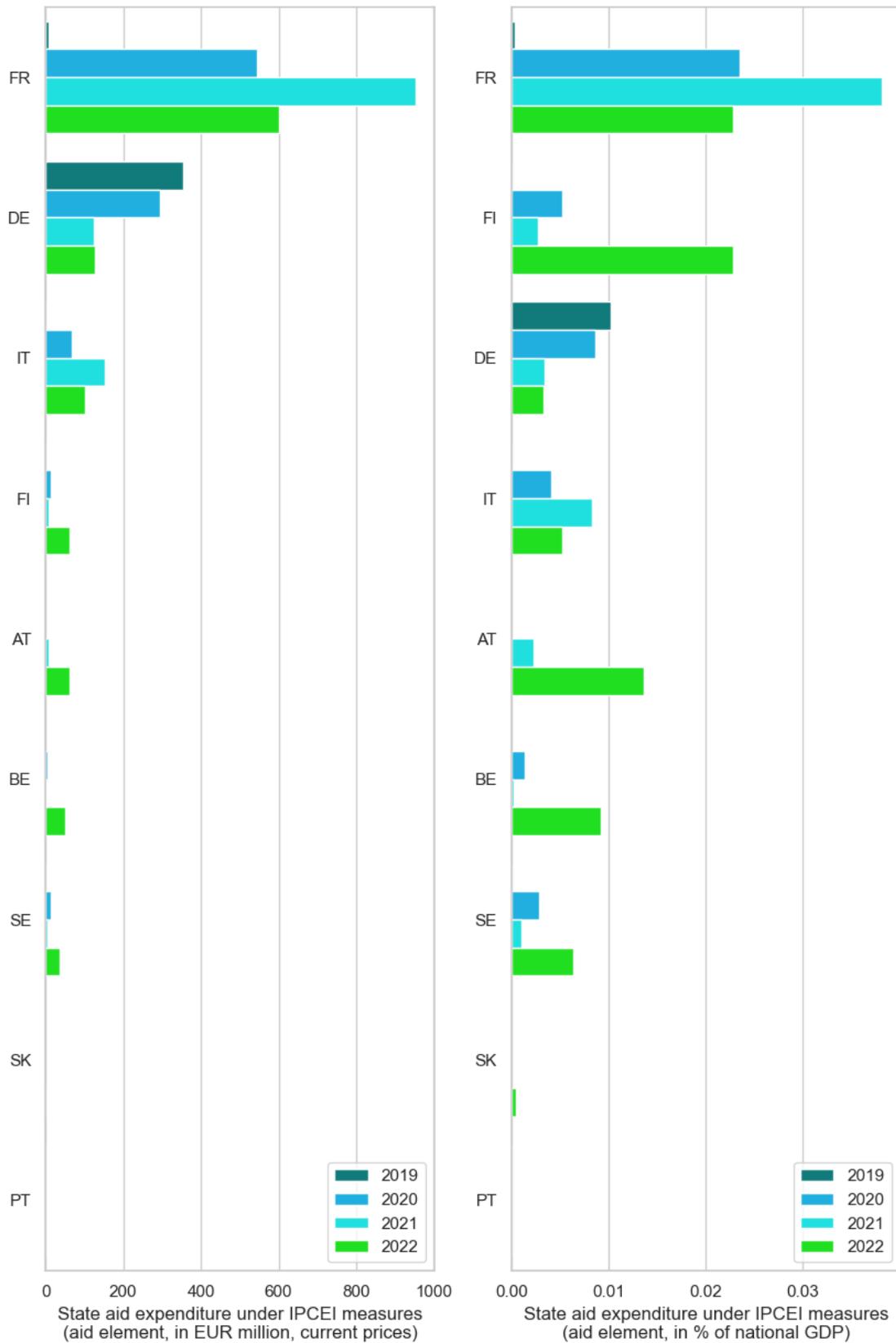


Figure 80 shows the evolution of State aid expenditure from 2019 to 2022 for the participating Member States that reported expenditures, in absolute values and in percentage of national GDP.

Figure 80: State aid expenditure for IPCEIs, 2019-2022, participating EU Member States



10.2.4 Regional aid Guidelines

As regards supporting greenfield productive investments or expanding existing manufacturing capacities in sectors strategic to the green transition, Member States can also rely on State aid rules to support manufacturing in assisted regions (the Regional aid Guidelines or the regional aid section of GBER).

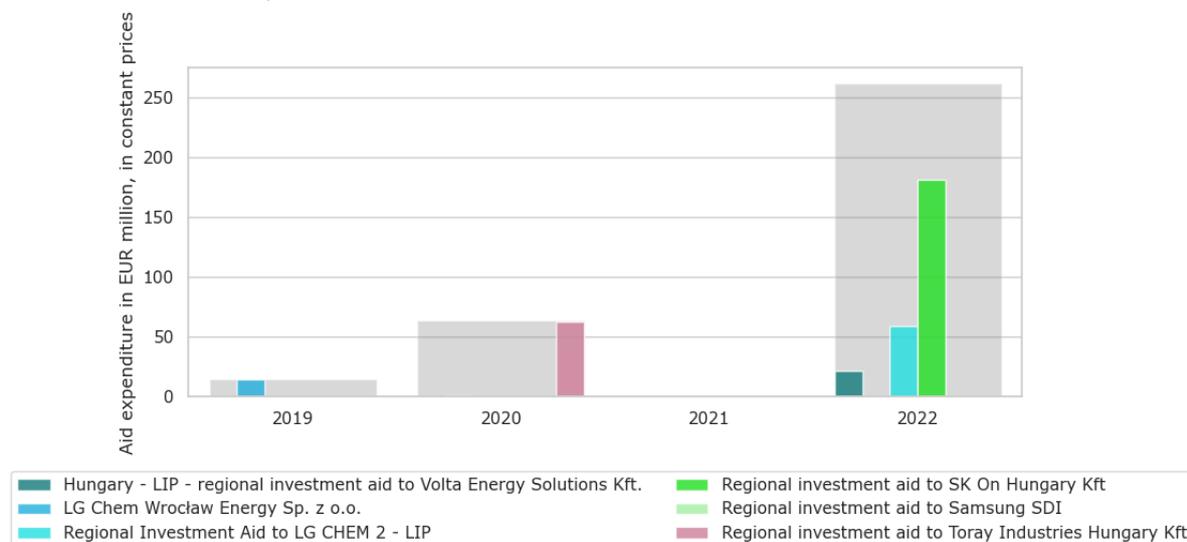
The assessment of aid should reflect the counterfactual scenario which can be an investment in an alternative location where a foreign subsidy would be granted. The assessment will compare the net present value of the investment in the target area with the net present value in the alternative location, and can include other factors of cost divergence such as higher energy prices in the EU. The amount of aid that can be granted is capped by maximum regional aid intensities.

Since 2019, 6 measures were approved under the Regional Aid Guidelines to support the manufacturing of batteries or battery components, mobilizing a total of EUR 572.3 million in public funds:

- Most recently, in 2023, EUR 89.6 million regional investment aid measure in Hungary for an investment in a electric vehicles battery manufacturing facility by Samsung in an Art 107(3)(a) area. The overall investment was EUR 1.2 billion to produce 6 million battery cells per month, and was expected to create 1200 direct jobs.
- EUR 209 million for a Hungarian measure to support the construction of a new battery cell manufacturing plant by SK On Hungary, approved in March 2022. The plant will have an annual capacity of 30 GWh and is expected to create at least 1,900 direct jobs. SK On Hungary's total investment into the project, which started in early 2021, will be of EUR 1,623 million.
- EUR 36 million investment aid for a Polish measure to the chemical company LG CHEM to set up a new electric vehicle battery plant in the Polish Dolnośląskie region (an area eligible for regional aid under Article 107(3)(a) of the Treaty on the Functioning of the European Union). The aid, approved in January 2019, supported an initial investment of EUR 325 million, creating 700 direct jobs.
- EUR 95 million for a Polish measure to expand LG Chem's battery cell production facility for electric vehicles approved in March 2022 (taking into account Chinese subsidies in the counterfactual). In 2017, LG Chem decided to invest EUR 1 billion to expand its production capacity of lithium-ion cells, battery modules and battery packs for electric vehicles ('EV') in its existing plant in the Polish Dolnośląskie region. The new plant is expected to supply batteries for more than 295,000 EV each year in the European Economic Area ('EEA').
- EUR 90 million were approved in 2021 to SKBM (a subsidiary of the SK group) for an investment in a new battery manufacturing plant.
- EUR 52.7 million regional investment aid in Hungary were already approved in 2020 for a large investment project of Toray Industries, concerning the establishment of a new plant for Battery Separator Films (BSF), to be used in batteries for Electric Vehicles.

Between 2019 and 2022, the overall expenditures the selected RAG measures to support batteries sector amounted to EUR 340.12 million in constant prices. The majority of the aid was spent in 2022, in which EUR 261.58 million have been spent under these measures. The breakdown by year and measure is presented in Figure 81.

Figure 81: Total State aid expenditures on RAG measures for batteries by measure, 2019-2022, EUR million, constant prices



10.2.5 Chips Act Communication

One case was approved in line with criteria set out in the Chips Act Communication in the course of 2022, RRF: STMicroelectronics – New Silicon Carbide Substrates Plant in Catania (SA.103083). The aid will take the form of a EUR 292.5 million direct grant to support STMicroelectronics' EUR 730 million investment for the construction of a Silicon Carbide ('SiC') wafer plant in Catania. SiC is a compound material used to manufacture wafers that serve as a base for specific microchips used in high-performance power devices, such as in electric vehicles, fast-charging stations, renewable energies and other industrial applications.

In the course of 2022 FR - Project Liberty – a new semiconductor manufacturing plant by STMicroelectronics and GlobalFoundries, was approved (SA.102430). The aid will take the form of direct grants to ST Microelectronics and to GlobalFoundries, to support their investments in the project worth totally EUR 7.4 billion.

Information on the aid effectively paid out by the Member States under these cases is not available yet.

10.2.6 Measures under the “transition sections” of the Temporary Crisis and Transition Framework

In the course of the end of 2022 and 2023, the Commission has taken 14 decisions approving 12 State aid measures notified by 10 Member States (Finland, France, Germany, Hungary, Italy, Ireland, Lithuania, Portugal, Slovakia, Slovenia) under section 2.5 of the Temporary Crisis and Transition Framework – Aid for accelerating the rollout of renewable energy and energy storage relevant for REPowerEU.

The total amount of aid approved is estimated around EUR 19.36 billion.

In 2023, one Czech measure was approved under section 2.6 TCTF - Aid for the decarbonisation of industrial production processes through electrification and/or the use of renewable and electricity-based hydrogen fulfilling certain conditions and for energy efficiency measures. The budget approved for the measure is more than EUR 2.45 billion. In the same year, 10 decisions approving 11 measures notified by 7 Member States (Austria, Belgium, Germany, Hungary, Italy, Spain, Slovakia) were approved under section 2.8 TCTF - Aid for accelerated investments in sectors strategic for the transition towards a net-zero economy, for a total amount of aid approved of EUR 9.1 billion.

11 Methodological remarks

Scope – The State Aid Scoreboard comprises aid expenditure made by Member States before 31.12.2021, which falls under the scope of Article 107(1) TFEU. The data is based on the annual reporting by Member States pursuant to Article 6(1) of Commission Regulation (EC) 794/2004. Expenditure refers to all existing aid measures to industries, services, agriculture, fisheries and transport for which the Commission adopted a formal decision or received an information fiche from the Member States in relation to measures qualifying for exemption under the General Block Exemption Regulation (GBER), Agricultural Block Exemption Regulation (ABER) or the Fishery and Aquaculture Block Exemption Regulation (FIBER).

Cases under examination are excluded. Annex III of Regulation 794/2004 specifies the scope and format of the information to be reported. The annual reports submitted by Member States in 2022 cover aid paid out by Member States between 1 January 2021 and 31 December 2021 and include, where appropriate, revised versions of provisional information that Member States provided in previous years. Accuracy of the data remains a responsibility of Member States.

Corrections on the historical data – Historical data were also updated to include reimbursement of incompatible aid and to include figures on public support that, after investigation by the Commission, has been deemed as constituting "non-notified" aid. Moreover, when the Commission adopts a decision on a non-notified aid measure, the aid amount in question is attributed to the year(s) in which it was awarded. Where such expenditure has been made for a number of years, the total aid amount is generally allocated equally over the corresponding years.

Constant prices – State aid expenditures in constant prices have been calculated to adjust for the effects of inflation. Constant series have been calculated in constant 2021 prices by using the GDP price deflator¹⁰⁰. Unless otherwise specified, historical State aid expenditures are expressed in constant prices.

Aid element – Generally, Member States are required to report State aid expenditure in terms of actual expenditure expressed in the form of the aid element calculated for the aid measure. Where such data were not available by the deadline for submitting the annual report (i.e., 30 June), Member States were requested to provide either the corresponding commitment information or an estimate of the aid component. In the absence of that information, Member States were asked to estimate the aid element in line with the standard method applied and on the basis of information provided in the past in their reporting.

The aid element can be estimated in different ways depending on the type of instrument: for grants, the advantage passed on to the beneficiary normally corresponds to the budgetary expenditure. For other aid instruments, the advantage to the beneficiary and the cost to government may differ. In the case of guarantees, for example, the beneficiary avoids the risk associated with the guarantee, since it is carried by the State. Such risk-carrying by the State should normally be remunerated by an appropriate premium. Where the State forgoes all or part of such a premium, there is both a benefit for the undertaking and a drain on the resources of the State. Thus, even if no payment was ever made by the State under a guarantee, there may nevertheless be State aid within the meaning of Article 107(1) TFEU. The aid is granted at the time when the guarantee is given, not when the guarantee is called on nor when payments are made under the terms of the guarantee.

Aid instruments – State aid represents a cost or a loss of revenue to the public authorities and a benefit to recipients. However, the aid element, i.e., the ultimate financial benefit contained in the nominal amount transferred to the beneficiary, depends to a large extent on the form in which the aid is provided. Below is a list of the most frequently used aid instruments.

Grants and tax exemptions – Grants and tax exemptions are types of aid transferred in full to the recipient. They represent the majority of aid granted in most Member States. They may be

100 Source AMECO online. Series GDP price deflator (PVGd), 2022 Autumn forecast

subdivided depending on whether the aid was granted through the budget or through the tax or social security system.

Equity participation – In line with established Commission policy, such interventions constitute aid when a private investor operating under normal market conditions would not have undertaken such an investment. See Commission Communication "Application of Articles 87 and 88 of the EEC Treaty and of Article 5 of Commission Directive 80/723/EEC to public undertakings in the manufacturing sector", OJ No C 307 of 13.11.1993, p3. This method is based on calculating the benefit of the intervention to the recipient.

Soft loans and tax deferrals – The aid element is lower than the capital values of the aid. Where a Member State fails to provide the aid element, a proxy of 15% of the total amount lent by the government is estimated (compared with 33% before 1995). This downward adjustment is explained by the lower level of the aid element that results from generally lower rates of interest in Member States when compared with previous periods.

Repayable advances - Where a Member State does not indicate the reimbursement ratio in case of a reimbursable advance, the aid element is estimated to be 90% of all advances as the repayment ratio has shown to be very low on average.

Guarantees – The aid element is much lower than the capital value guaranteed. Where the exact amount of the aid element is not available, the losses to the Government are estimated. Where only the capital value guaranteed is available, the aid element is estimated to be 10% of that value.

Annex I. Largest State aid Schemes by policy objectives

1 Agriculture, Forestry, and Rural areas

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Poland	SA.102555	TCF - Aid to agricultural producers in connection with the increase in fertilizer prices following the aggression against Ukraine by Russia	556.5
Spain	SA.104060	Aid towards the payment of insurance premiums (modification)	364.0
France	SA.61993	Aides à l'indemnisation des calamités agricoles par le Fonds national de gestion des risques en agriculture (FNGRA)	300.3
Poland	SA.102886	Zwrot części podatku akcyzowego zawartego w cenie oleju napędowego wykorzystywanego do produkcji rolnej z uwzględnieniem stawki minimalnej określonej w Dyrektywie 2003/96/WE.	265.1
France	SA.102484	Modification du régime "Aides aux investissements dans les exploitations agricoles liés à la production primaire"	263.2
France	SA.61870	Régime cadre exempté de notification relatif aux aides visant à couvrir les coûts de prévention et d'éradication des maladies animales et des organismes nuisibles aux végétaux, ainsi que de lutte contre ces maladies et organismes, et aides destinées	261.6
Spain	SA.43021	Investissements dans le développement des zones forestières et amélioration de la viabilité des forêts	236.5
France	SA.102784	TCF: Exceptional scheme to cover the additional animal feed costs of farms and fish farms	230.6
Bulgaria	SA.103875	TCF: Aid to support the liquidity of farmers to overcome the negative economic impact of Russian aggression against Ukraine	177.3
Germany	SA.56482	Bund: GAK group measure 5F "Aid to prevent and make good the damage caused by extreme weather conditions in forests"	166.6
Poland	SA.39562	Premium subsidies for crops and livestock insurance and partial refinancing of compensation indemnities paid to agricultural producers as a result of drought (reinsurance)	161.5
Netherlands	SA.56811	Amendment to Model regulation-Grant scheme nature and landscape management 2016 (SVNL 2016)	157.6
Netherlands	SA.37628	Reduced energy tax rates on natural gas for greenhouse horticulture in 2015 – 2024	153.0
France	SA.60552	Aide aux actions de recherche et développement	141.2

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
		agricole (CASDAR)	
Germany	SA.103062	Federal government: investment funding as part of the investment and future program for agriculture	128.0
Italy	SA.60890	Financements pour l'achat de machines, d'installations et d'équipements nouveaux par les PME du secteur de la production de produits agricoles	127.1
Finland	SA.43440	Aid for farm replacement services	113.2
Spain	SA.64683	RRF - Use of precision farming and technologies 4.0 in the agriculture and livestock sector support programme	112.8
Austria	SA.45368	Aid for insurance premiums to cover losses in primary agricultural production	104.3
Germany	SA.55089	Bund: GAK framework plan – support area 3A "Improving the processing and marketing structures of agricultural products", measure 2.0 "Investments for processing and marketing of agricultural products" – support for medium sized enterprises	91.9
Denmark	SA.57228	Fonds des taxes à la production et des taxes « pour mille » dans le secteur agricole	81.2
Czechia	SA.54137	Subsidy framework for granting of contributions for the forest management	79.8
Germany	SA.58269	Bayern: Forestry aid programme (WALDFÖPR 2020)	71.0
France	SA.60553	Aides en faveur des PME actives dans la transformation et la commercialisation de produits agricoles pour la période 2015-2022	70.7
Netherlands	SA.48351	Model grant scheme Quality impulse Nature and Landscape	69.5

2 Closure aid

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Germany	N 708/2007	Coal mine closure plan 2008-2018	77.1
Slovakia	SA.55038	Aid to cover the exceptional costs of Hornonitrianske bane Prievidza (HBP) related to the closure of its mining operations	11.8

3 Compensation of damages caused by natural disaster

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Germany	SA.100214	Richtlinie über die Gewährung von Billigkeitsleistungen des Landes Nordrhein-Westfalen zur Beseitigung von Schäden an öffentlicher und privater Infrastruktur sowie zum Wiederaufbau anlässlich der Starkregen- und Hochwasserkatastrophe im Juli 2021 (Förderrichtlinie Wiederaufbau Nordrhein-Westfalen)	296.0
Germany	SA.100477	Gewährung staatlicher Finanzhilfen zur Beseitigung der Schäden aufgrund des Starkregens und des Hochwassers am 14. und 15. Juli 2021 in den Landkreisen Ahrweiler, BernkastelWittlich, CochemZell, Eifelkreis BitburgPrüm, Ma-yenKoblenz, Trier-Saarburg und Vulkaneifel sowie der kreisfreien Stadt Trier (VV Wiederaufbau RLP 2021)	110.5
Italy	SA.52730	Aiuti destinati a ovviare ai danni arrecati dal sisma in centro Italia del 2016	73.0
Netherlands	SA.100085	Regeling tegemoetkoming waterschade in Limburg en het onbedijkte gebied langs de Maas in Noord-Brabant in juli 2021	70.7
Italy	SA.46610	Extension of duration of aid scheme to compensate for damage caused by the earthquakes of May 2012 in Regions Emilia Romagna, Lombardia and Veneto	54.0
Croatia	SA.104024	Treće izmjene i dopune Programa dodjele državnih potpora za vraćanje u ispravno radno stanje infrastrukture i pogona u energetske sektoru	51.6
Greece	SA.100358	Καθορισμός επιχορήγησης των πληγέντων από τις πλημμύρες της 17ης έως και 20ης Σεπτεμβρίου 2020 σε περιοχές της Περιφερειακής Ενότητας Καρδίτσας της Περιφέρειας Θεσσαλίας	11.0
Italy	SA.54630	Decreto del Presidente del Consiglio dei Ministri del 27 febbraio 2019 per i danni ai siti, alle attività e alle opere in ambito forestale causati dagli eventi meteorologici calamitosi dal 27 ottobre 2018 al 5 novembre 2018 nella Regione del Veneto	10.5
Czechia	SA.64480	Nemovitosti	6.9
Germany	SA.56037	Finanzielle Hilfen nach Unwetter mit Hochwasser im Mai/Juni 2016 [BY]	5.0
Spain	SA.105375	AGRI - Mantenimiento de la actividad económica y el empleo al objeto de minimizar el impacto de los daños producidos por las erupciones volcánicas en la isla de La Palma	4.5
Italy	SA.55682	EMERGENZA VAIA DIMARO	4.4

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Cyprus	SA.101223	Modification du cadre national envisagé pour l'octroi d'aides d'Etat destinées à compenser les pertes subies dans le secteur agricole au cours de la période 2014-2020 (régime d'aides d'Etat SA.56658 (2020/N), prolongé par la mesure SA.59580 (2020/N).	4.4
Italy	SA.47288	Avviso per la concessione di contributi a Grandi, Medie, Piccole e Micro imprese danneggiate dagli eventi calamitosi del 14-20 ottobre 2015 in attuazione delle DGR n. 401 del 20 luglio 2016 e DGR n. 565 del 18 ottobre 2016	3.8
Netherlands	SA.104994	TCF - Temporary energy price limit	3.5
Italy	SA.101305	Procedura operativa per la gestione delle domande di accesso ai contributi, previsti ai sensi del DPCM 27/02/2019, a favore delle attività economiche extra agricole interessate dagli eventi calamitosi verificatisi nel territorio della Regione Liguria il 29 e 30 ottobre 2018 - aiuti ai sensi del Regolamento (UE) 651/2014. Proroga	3.0
Portugal	SA.49627	Support Scheme to Reposition of Competitiveness and Productive Capabilities, which aims at the recovery of corporate assets totally or partially damaged by fires occurred on October 15, 2017, in the municipalities of the Central and North regions particularly affected	2.9
Italy	SA.103825	Stato di emergenza per il 29 e 30 ottobre 2018. Procedure previste dal DPCM 29 febbraio per ulteriori contributi per gli interventi di ripristino o sostituzione di macchinari, attrezzature, scorte, prodotti finiti e semilavorati, beni mobili registrati strumentali all'attività di impresa danneggiati dagli eventi in oggetto. Comparto attività economiche e produttive, professionisti, titolari p. IVA. Proroga	2.9
Germany	SA.100521	Hilfsmaßnahmen für die Betroffenen der Starkregen- und Hochwasserkatastrophen im Juli 2021; Programm zur Wiederherstellung der Infrastruktur in den Gemeinden (Programm Wiederherstellung Infrastruktur Hochwasser Juli 2021 – PWI 2021)	2.9
Italy	SA.60630	D.L. 189/2016 convertito in Legge 299/2016 art. 20 bis come modificato dall'art. 44 comma 1bis D.L. 50/2017 - Disposizioni Attuative di cui al Decreto del Ministro dello Sviluppo Economico di concerto con il Ministro dell'Economia e delle Finanze dell'11 agosto 2017 pubblicato in Gazzetta Ufficiale 24 ottobre 2017, n. 249. Proroga aiuto.	2.7
Italy	SA.54756	Decreto del Presidente del Consiglio dei Ministri del 27 febbraio 2019 per i danni alle attività economiche e produttive causati dagli eventi meteorologici calamitosi occorsi dal 27 ottobre 2018 al 5 novembre 2018 che hanno colpito la Regione del Veneto. Aiuti intesi a ovviare ai danni arrecati da calamità naturali ai sensi dell'articolo 50 del Regolamento UE n. 651/2014.	2.7

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Greece	SA.100795	Règlement sur les aides d'Etat	2.6
Greece	SA.103041	Καθορισμός επιχορήγησης των πληγέντων από την πλημμύρα της 20ης έως 22ας Οκτωβρίου 2020 και της 6ης, 7ης, 8ης και 10ης Νοεμβρίου 2020, σε περιοχές της Περιφερειακής Ενότητας Ηρακλείου της Περιφέρειας Κρήτης.	2.5
Italy	SA.48508	Detassazione di contributi, indennizzi e risarcimenti	2.2
Belgium	SA.100482	Régime particulier d'indemnisation de certains dommages causés par les inondations et pluies abondantes survenues du 14 au 16 juillet 2021 ainsi que le 24 juillet 2021 et reconnues en tant que calamité naturelle publique.	1.4

4 Culture and heritage conservation

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
France	SA.42681	Régime cadre exempté de notification relatif aux aides en faveur de la culture et de la conservation du patrimoine	1 277.4
Netherlands	SA.60555	NL-OCW culturele basisinfrastructuur 2021-2024	543.8
Germany	SA.64165	Sonderfonds des Bundes für Kulturveranstaltungen	328.8
Hungary	SA.50768	Further Amendment of the Hungarian Film Support Scheme	216.7
Spain	SA.57608	Modification of Spanish tax deduction scheme for cinematographic and audio-visual productions - ES	200.0
France	SA.63595	Crédit d'impôt audiovisuel - modifications	183.6
Belgium	SA.59274	Prolongation du Régime d'aide Tax Shelter pour la production des œuvres audiovisuelle SA.38370 (2014/N), Belgique	173.4
Belgium	SA.60734	Decreet houdende de ondersteuning van de Professionele Kunsten	170.0
France	SA.43130	Crédit d'impôt cinéma et audiovisuel et Crédit d'impôt pour les œuvres cinématographiques et audiovisuelles étrangères - modifications et prolongation	154.5
Netherlands	SA.101899	Nationale Monumentenregeling / Monumentenkader	131.1
Belgium	SA.60099	Decreet betreffende het onroerend erfgoed van 12 juli 2013	130.6

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
France	SA.48907	Aides financières automatiques à la production et à la préparation des œuvres audiovisuelles - documentaire de création et fiction (FR)	129.0
Ireland	SA.38959	Irish Film tax relief support scheme modifications	117.0
France	SA.56276	Crédit d'impôt pour les dépenses de production en France d'œuvres cinématographiques ou audiovisuelles étrangères	115.6
Netherlands	SA.101925	NL-OCW Regeling ter tegemoetkoming van geleden verlies door COVID-19-maatregelen bij concerten en voorstellingen in de periode van 28 november 2021 tot en met januari 2022	105.3
Netherlands	SA.102160	NL-OCW Regeling van de Staatssecretaris van Onderwijs, Cultuur en Wetenschap van 16 februari 2022, nr. 31473255, tot wijziging van de Regeling aanvullende ondersteuning culturele en creatieve sector COVID-19 in verband met een vijfde aanvullend steunpakket	98.8
Netherlands	SA.102805	NL-OCW Upstream: Music	90.7
Czechia	SA.43568	Integrovaný regionální operační program pro období 2014 – 2020 Prioritní osa 3: Dobrá správa území a zefektivnění veřejných institucí Specifický cíl: 3.1 Zefektivnění prezentace, posílení ochrany a rozvoje kulturního dědictví	80.6
Sweden	SA.101693	Statsbidrag till kulturella ändamål	77.8
France	SA.52059	Aides financières automatiques à la production et à la préparation des œuvres cinématographiques de longue durée	77.2
Belgium	SA.60504	7 juli 2017 - Decreet houdende de subsidiëring en erkenning van het sociaal-cultureel volwassenenwerk	75.6
Poland	SA.59171	Budowa siedziby Europejskiego Centrum Filmowego CAMERIMAGE	71.0
Estonia	SA.61723	Kultuuri edendamise ja kultuuripärandi säilitamise abikava (pikendamine)	64.2
Italy	SA.62194	Tax credit to attract investments for cinematographic and audiovisual works in Italy	60.0
Spain	SA.101026	CULT- Ayudas a la producción de largometrajes y cortometrajes ampliables con fondos MRR (Modificación SA.60808)	53.7

5 Employment

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Poland	SA.64119	Dofinansowanie do wynagrodzenia pracowników niepełnosprawnych	654.8
Denmark	SA.35545	Flexi-job scheme, including new compensation to companies; Social measures in the employment sector	499.3
Belgium	SA.53082	Maatwerk voor collectieve inschakeling	474.1
France	SA.58982	Régime cadre exempté de notification relatif aux aides en faveur de l'emploi des travailleurs défavorisés et des travailleurs handicapés pour la période 2014-2023	390.8
Hungary	SA.63788	Csoportmentességi rendelet szerinti támogatások a fejezeti kezelésű előirányzatok és központi kezelésű előirányzatok kezeléséről és felhasználásáról szóló 58/2015. (XII. 30.) EMMI rendelet alapján 2017-től (meghosszabbítás)	155.7
Belgium	SA.100806	Régime de subventions pour les entreprises de travail adapté en vue de compenser les surcoûts liés à l'emploi de personnes en situation de handicap	139.5
Slovenia	SA.43396	Aid to employers for the employment of workers with disabilities	121.1
Belgium	SA.53048	Professionele integratie van personen met een handicap - VOP (loonsubsidies)	108.5
Poland	SA.46134	State aid No SA.46134 (2016/N) - Poland – State aid scheme for operators employing persons held in detention (amendment to the aid scheme SA.33608 (2011/N)).	98.1
Slovakia	SA.101576	Schéma štátnej pomoci na podporu vzdelávania a pomoci na prijímanie do zamestnania a zamestnávanie znevýhodnených zamestnancov a zamestnancov so zdravotným postihnutím v znení dodatku č. 2	69.0
Spain	SA.56270	ASOC - Ayudas a la empleabilidad de personas con discapacidad	60.5
Germany	SA.64783	Prolongation with amendments of the scheme on the reduction of non-wage labour costs in maritime shipping	41.0
Denmark	X 98/2010	Ansættelse med løntilskud (bemærk, at denne indberetning også omfatter støtteordning NN33/2004 samtidig med N172/2003) - TO BE DEFINED	39.3
Spain	SA.103116	ASOC - Fomento del empleo para personas con diversidad funcional o discapacidad en Centros Especiales de Empleo y enclaves laborales.	36.2
Finland	SA.40791	Palkkatukiohjelmä	35.6

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Italy	SA.64305	Incentivi alle assunzioni	26.3
Croatia	SA.101955	Izmjena Programa državnih potpora za zapošljavanje i usavršavanje u nadležnosti Hrvatskog zavoda za zapošljavanje za razdoblje od 2021. do 2023. godine	21.9
Spain	SA.103976	ASOC - Programa de inclusión laboral de personas con discapacidad en el mercado de trabajo protegido de Castilla-La Mancha, mediante ayudas a la inversión fija generadora de empleo, a los costes salariales, a las unidades de apoyo.	18.9
Lithuania	SA.101780	Parama socialinems įmonems	17.5
Spain	SA.62592	ASOC - Integración laboral de personas con discapacidad en Centros Especiales de Empleo de Aragón (prórroga ayuda SA.55886)	17.1
Croatia	SA.60944	PROGRAM POTICAJA PRI ZAPOSŁJAVANJU OSOBA S INVALIDITETOM ZA 2021.-2023. GODINU	16.0
Spain	SA.59835	ASOC - Subvenciones para el empleo de trabajadores con discapacidad en forma de subvenciones salariales dirigidas a empresas radicadas en el Principado de Asturias.	15.2
Slovenia	SA.61323	Pomoč delodajalcem zaradi zaposlenih invalidov	14.9
Belgium	SA.48579	Subvention aux entreprises d'insertion	12.7
Spain	SA.64160	ASOC - Subvenciones a centros especiales de empleo destinadas al mantenimiento de los puestos de trabajo ocupados por personas con discapacidad	9.9

6 Environmental protection, including energy savings

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Germany	SA.64376	EEG 2021 amendments	4 495.0
Denmark	SA.42897	The Danish Electricity Tax Reimbursement Scheme	2 392.1
Germany	SA.42393	Reform of support for cogeneration in Germany	1 477.8
Czechia	SA.40171	2006 RES support scheme	1 471.6
Poland	SA.46100	Polish capacity mechanism	1 397.4
Germany	SA.64233	Prolongation of the reduced EEG-surcharge for railways	1 395.0
Sweden	SA.62892	Energiskatt på el som förbrukas i tillverkningsprocessen i industriell verksamhet – nedsättning av energiskatten på el	1 375.1

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Germany	SA.39500	Entlastung von der Stromsteuer für bestimmte energieintensive Unternehmen des produzierenden Gewerbes gemäß § 10 Stromsteuergesetz (Spitzenausgleich)	1 375.0
France	SA.102592	Tarif réduit d'accise sur les énergies applicable aux consommations des activités de travaux agricoles et forestiers (gazoles, gaz de pétrole liquéfiés combustible, gaz naturels combustible).	1 359.0
Belgium	SA.46013	Green electricity certificates and CHP certificates in Flanders	1 333.0
France	SA.102587	Tarif réduit d'accise sur les énergies applicable aux consommations de gazoles de l'activité de transport routier de marchandises.	1 247.0
Germany	SA.39499	Allgemeine Entlastung von der Stromsteuer für Unternehmen des produzierenden Gewerbes und Unternehmen der Land- und Forstwirtschaft gemäß § 9b Stromsteuergesetz (Anzeige aufgrund Neufassung der AGVO)	959.0
Italy	SA.53821	Modification of the Italian capacity mechanism	939.4
Germany	SA.46526	Reduced surcharge for self-generation under EEG 2017	854.0
Germany	SA.100559	Compensation for indirect ETS costs in Germany for 2021-2030	761.9
Germany	SA.39552	Verwendung von Energieerzeugnissen in begünstigten Anlagen gemäß § 3 und § 3a Energiesteuergesetz (Anzeige aufgrund Neufassung der AGVO)	730.0
Finland	SA.61595	Eriytetyn sähköveron muuttaminen	718.6
Germany	SA.56380	Richtlinie zur Förderung der beschleunigten Modernisierung von Heizungsanlagen bei Nutzung erneuerbarer Energien, Anreizprogramm Energieeffizienz (APEE), Heizungspaket, erneuerbare Energien [BMW i]	609.6
Germany	SA.53595	Steuerbefreiung für Strom, der in Anlagen aus erneuerbaren Energieträgern oder in hocheffizienten KWK-Anlagen, jeweils mit einer elektrischen Nennleistung von bis zu zwei Megawatt, erzeugt wird, und zum Eigenverbrauch entnommen bzw. an Letztverbraucher im räumlichen Zusammenhang geleistet wird (§ 9 Absatz 1 Nummer 3 Stromsteuergesetz)	579.0
Romania	SA.46894	Amendments to the green certificates support system for promoting electricity from renewable sources	522.1
France	SA.102585	Tarif réduit d'accise sur les énergies applicable aux produits taxables en tant que combustible consommés pour les besoins des installations intensives en énergie soumises au SEQUE de l'UE.	469.0
Austria	SA.62645	Energieabgabenvergütung für Produktionsbetriebe	446.0
Germany	SA.59057	Energiesteuerentlastung für Betriebe der Land-	440.0

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
		und Forstwirtschaft für Gasöl nach § 57 Absatz 5 Nummer 1 Energiesteuergesetz [BMF]	
Netherlands	SA.34411	SDE +	384.8
Ireland	SA.44464	Irish Capacity Mechanism: reliability option scheme	363.0

7 Fisheries and aquaculture

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
France	SA.62426	Aide à l'arrêt temporaire des activités de pêche dans le cadre du retrait du Royaume-Uni de_x005F Grande-Bretagne et d'Irlande du Nord	19.1
Ireland	SA.103190	Brexit Temporary Fleet Tie-up Scheme 2022 (amendment)	18.7
France	SA.63722	Aid for investments in the processing and marketing of fishery and aquaculture products	12.2
Czechia	SA.58567	Support to construction, renewal and dredging ponds and water reservoirs	9.6
Italy	SA.102453	Elementi necessari ai sensi dei capi I (Disposizioni comuni), II (Controllo) e III (Disposizioni specifiche per diverse categorie di aiuti) del regolamento (UE) n. 1388 della Commissione, del 16 dicembre 2014 che dichiara compatibili con il mercato interno, in applicazione degli articoli 107 e 108 del trattato sul funzionamento dell'Unione europea, alcune categorie di aiuti a favore delle imprese attive nel settore della produzione, trasformazione e commercializzazione dei prodotti della pesca e dell'acquac	7.7
Ireland	SA.64035	Brexit Temporary Tie-up Scheme	5.5
France	SA.63723	Aid for investments in fishing ports, auction halls and landing sites	3.8
Czechia	SA.37112	Support for non-productive functions of lakes _x005F	3.6
Croatia	SA.49077	Damage caused by birds and other animals to carp fishponds	3.0
Germany	SA.63536	Germany (Federal government): liquidity aid in the fishery sector in connection with the Brexit adjustment reserve (BAR)	2.5
Belgium	SA.55407	Aid scheme 'Support Fund for Fisheries in Transition' (OVIS)	2.3

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Germany	SA.56277	Bayern: Agrarumweltmaßnahme - Extensive Teichwirtschaft (KULAP - B58) und Biotoptyp Teiche (VNP) 2020	2.0
Denmark	SA.60574	Skattelignende afgifter til fordel for Fiskeafgiftsfonden (støtte til fordel for fiskeriet i henhold til EU's statsstøtteregele og finansieret af Fiskeafgiftsfonden)	1.8
Germany	SA.50459	Compensation for otter damage	1.1
France	SA.52773	Aide aux porteurs sélectionnés pour la mise en oeuvre des opérations de repeuplement des anguilles conformément au plan de gestion de l'anguille approuvé.	1.0
Germany	SA.105313	Sachsen: Konjunkturprogramm: „Nachhaltig aus der Krise" (FRL Nachhaltig aus der Krise)	0.8
Croatia	SA.100237	"Zaštita i obnova morske bioraznolikosti i morskih ekosustava i režimi naknade u okviru održivih ribolovnih aktivnosti" – kompenzacija za štete na ulovima koju uzrokuju sisavci	0.7
Lithuania	SA.42576	Valstybės pagalba gamtos išteklių apsaugai gerinti akvakultūros tvenkiniuose 2015–2020 metais	0.7
Germany	SA.57211	Beaver management– Compensation for damage caused by beavers	0.7
Germany	SA.55190	Brandenburg: Compensation of damage caused by protected species in pond farms	0.6
Belgium	SA.103790	TCF: Scheme to compensate for additional costs in the fisheries sector caused by the Russian aggression against Ukraine	0.6
Italy	SA.54622	Concessione dei contributi di cui al Decreto del Presidente del Consiglio dei Ministri del 27 febbraio 2019 per i danni alle attività della pesca e dell'acquacoltura causati dagli eventi meteorologici calamitosi occorsi dal 27 ottobre 2018 al 05 nove	0.6
Finland	SA.62660	C 21/2010, 11.1.2012 2012/287/EU, C(2011) 10065, aid reported without SA -reference code	0.6
Ireland	SA.102241	Brexit Fisheries Cooperative Transition Scheme	0.6
Spain	SA.103417	PESCA - Ayudas para seguros de las poblaciones acuícolas marinas	0.5

8 Other

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Italy	SA.48260	Italian International Registry Scheme	636.2

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Sweden	SA.38469	Sheltered employment in Sweden	627.5
Slovakia	N 506/2010	Partial financing of decommissioning of two already shut down nuclear plants (A1 and V1)_x005F	71.5
France	SA.55472	Taxe affectée au financement de l'amélioration de l'espèce équine et de la promotion de l'élevage, de la formation dans le secteur des courses et de l'élevage chevalin ainsi que du développement rural	69.8
Greece	SA.39224	Reset of Greek Motorway Concession Projects – Moreas Motorway	44.5
Italy	SA.41647	Italy - Strategia Banda Ultra Larga	37.7
Croatia	SA.56832	Sixth amendment to the concession agreement relating to the Istrian Y Motorway (sub-phase 2B2-1: section "Vranja interchange to the Ucka tunnel/Kvarner portal")	32.6
Germany	SA.42268	State aid for the promotion of public welfare services	28.7
Latvia	SA.36904	MLB development segment and creation of the Latvian Single Development Institution	17.4
Germany	SA.47195	Kooperationsprogramm Deutschland-Niederland 2014-2020	6.7
Netherlands	SA.50389	NL_BZK_CSDO_LB Wijzigingsbesluit Nadere subsidieregels Interreg V-A programma Euregio Maas-Rijn (DG COMP)	4.1
Lithuania	SA.53074	Klaipėda LNG terminal	2.7
Denmark	SA.52951	Prolongation and amendment of scheme for the development, production and promotion of cultural and educational digital games - DK	2.1
Slovenia	SA.59024	Modification to SA.41998, SA.54949	1.6
Denmark	SA.43732	SME aid within the European Transnational Cooperation programme Interreg North Sea Region Programme.	1.0
Belgium	SA.60034	Regeling voor steun in het kader van Interreg Vlaanderen-Nederland 2014-2020 onder de algemene groepsvrijstellingsverordening	0.8
Greece	SA.56599	Modification of the Superfast Broadband (SFBB) Project - EL	0.7
Netherlands	SA.59424	NL_BZK_CSDO_LB Nadere subsidieregels Interreg V-A programma Euregio Maas-Rijn 2020-2022 (call 6 looptijd 13/10/2020 tot en met 10 november 2020) (DG COMP)	0.7
Austria	SA.40433	Investitionsprogramm Flughafen Klagenfurt	0.3
Italy	SA.57913	AGGIORNAMENTO DEL D.D.S. N. 7623 DEL 26/06/2017 "APPROVAZIONE DEL PRIMO AVVISO PUBBLICO PER LA PRESENTAZIONE DEI PROGETTI	0.2

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
		DEL PROGRAMMA DI COOPERAZIONE INTERREG V-A ITALIA-SVIZZERA 2014-2020" AI FINI DELLA COMUNICAZIONE DELLA PROROGA DELL'AIUTO SA.48663.	
France	SA.59105	Régime cadre exempté de notification relatif aux aides couvrant les coûts de coopération des PME dans le cadre de projets de Coopération territoriale européenne (CTE)	0.1
Hungary	SA.102051	A 2014-2020 programozási időszakra az Európai Területi Együttműködési Programokból az általános csoportmentességi rendelet alapján nyújtható támogatások - megfeleltetés a 2021/1237/EU bizottsági rendeletnek	0.1
Italy	SA.54732	Avvisi Pubblici per la presentazione di progetti di cooperazione con procedura "one step" a valere sugli Assi prioritari I, II, III del programma INTERREG V – A Italia Malta	0.1
Spain	SA.59133	HAC - Programa INTERREG V-A ESPAÑA-PORTUGAL 2014-2020 (modificación de SA.43698)	0.1
Germany	SA.103695	Interreg Baltic Sea Region 2021-2027 aid scheme [SH]	0.1

9 Promote the execution of an important project of common European interest

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
France	SA.54794	Summer IPCEI Batteries - France - coordinating	290.0
Italy	SA.46595	IPCEI on Microelectronics - Italy	101.3
France	SA.46705	IPCEI on Microelectronics - France	66.0
Germany	SA.54801	Summer IPCEI Batteries - Germany	56.8
Denmark	SA.39078	Financing of the Fehmarn Belt Fixed Link project	39.0
Germany	SA.55831	Autumn IPCEI Batteries - Germany - coordinating	36.6
Sweden	SA.54796	Summer IPCEI Batteries - Sweden	36.0
Germany	SA.46578	IPCEI on Microelectronics - Germany	34.1
Finland	SA.64628	IPCEI Hydrogen – Hy2Use - Finland	33.6
Belgium	SA.64641	IPCEI Hydrogen – Hy2Use - Belgium	31.5
Austria	SA.56606	Austria joining the IPCEI Microelectronics 2018	15.7

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Austria	SA.55855	Autumn IPCEI Batteries - Austria	12.9
Slovakia	SA.55819	Autumn IPCEI Batteries – Slovakia	0.4
Finland	SA.33823	Electricity cable between mainland Finland and Åland	0.2

10 Promotion of export and internationalisation

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Spain	SA.35550	'Spanish Goodwill III' - tax amortisation of financial goodwill for foreign shareholding acquisitions	999.4
Italy	526/1982	Contributi in conto interessi per credito all'esportazione (Legge. 227/77 Ossola e 526/82)	42.8
Finland	93-018E	Finnfund (Finnish Fund for Industrial Cooperation)	10.0
Belgium	NN 76/1995	MESURES EN FAVEUR DE LA PROMOTION DE L'EXPORTATION (REGION FLAMANDE)	9.3
Italy	NN 124/1992	Norme sulla promozione della partecipazione a società ed imprese miste all'estero (SIMEST) Legge 100/90 art. 4	1.6
Belgium	N 636/1998	Uitrustingsgoederen	0.6

11 Regional development

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Italy	SA.101690	Credito d'imposta per investimenti nel Mezzogiorno ai sensi dell'art. 1, commi 98 - 108 della legge 28 dicembre 2015, n. 208, come modificato dall'art. 7-quater del decreto-legge 29 dicembre 2016, n. 243 convertito nella legge 27 febbraio 2017, n. 18, dall'articolo 1, comma 319, legge 27 dicembre 2019 n. 160, dall'art. 1, comma 171, della legge 30 dicembre 2020, n. 178, dall'articolo 1 comma 175 della legge 30 dicembre 2021, n. 234 e nelle Zone economiche speciali (ZES) ai sensi dell'art. 5, comma 2, del d	1 996.2
France	SA.102059	Exonérations des cotisations sociales patronales de sécurité sociale	1 726.4

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Germany	SA.38348	NGA Germany_x005F	1 020.0
France	SA.102915	Aide fiscale à l'investissement productif outre-mer	827.0
France	SA.37183	Plan France Très Haut Débit	649.7
Hungary	SA.101363	A beruházás ösztönzési célú irányzat felhasználásáról szóló 210/2014 (VII.27.) Korm. rendelet - éves keretösszeg emelés (meghosszabbítás)	510.6
France	SA.63693	Operating aid scheme for outermost regions providing reductions on the Octroi de Mer Tax	444.4
Spain	SA.101887	HAC - Régimen Económico Fiscal de Canarias (REF). Ayudas al funcionamiento (Prórroga SA.61363)	425.1
Spain	SA.101888	HAC - Régimen Económico Fiscal de Canarias (REF). Ayudas a la inversión (Prórroga SA.61314)	290.8
France	SA.102054	Non application des taux majorés de taxe sur les salaires dans les DOM et taxation réduite des rémunérations versées dans les DOM	268.0
Germany	SA.101541	Bund-Länder-Gemeinschaftsaufgabe "Verbesserung der regionalen Wirtschaftsstruktur" – gewerbliche Wirtschaft [BMW]i	259.2
Poland	X 193/2009	Program pomocy regionalnej udzielanej przedsiębiorcom prowadzącym działalność gospodarczą w specjalnych strefach ekonomicznych na podstawie zezwolenia wydanego po 1 stycznia 2007 r.	236.0
Portugal	SA.42136	Evaluation Plan: Inovação Empresarial	226.0
Portugal	SA.104291	Regime Fiscal de Apoio ao Investimento	204.7
Spain	SA.41597	HAC - Ayudas regionales a la inversión conforme a las Directrices sobre las ayudas estatales de finalidad regional para el período 2014-2020	196.0
Poland	SA.40523	Regional aid scheme for enterprises conducting business activity in the Special Economic Zones, on the basis of a permit issued in the period from 25 December 2014 to 31 December 2020	190.9
Hungary	SA.63328	Regional investment aid to SK On Hungary Kft	181.2
Hungary	SA.101361	Regionális beruházáshoz nyújtott támogatás a Gazdaságfejlesztési és Innovációs Operatív Programból (GINOP) - megfeleltetés a 2017/1084/EU bizottsági rendeletnek - költségvetés emelés (meghosszabbítás)	180.2
Poland	PL 39/2004	Regional Aid Scheme for the Enterprises conducting business activity in the special economic zones, on the basis of a permit issued after 31 December , 2000.	170.7
Italy	SA.48060	Credito d'imposta alle imprese che effettuano l'acquisizione di beni strumentali nuovi destinati a	168.8

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
		strutture produttive ubicate nelle zone assistite delle Regioni Campania, Puglia, Basilicata, Calabria, Sicilia e Sardegna ammissibili alle deroghe ex art. 107 par. 3 lett. a) del TFUE e nelle zone assistite delle regioni Molise ed Abruzzo, ammissibili alle deroghe previste dall'art. 107 par. 3 lett.c) del TFUE come individuate dalla Carta degli aiuti a finalità regionale 2014-2020, 6264 final del 16.09.2014, come modificata dalla decisione C(2016) 5938 final, del 23.09.2016.	
Italy	SA.48248	Contratti di sviluppo 2015-2020 - National aid scheme for regional, SME, RDI and environmental aid to large investments - Evaluation Plan	148.0
Germany	SA.38690	NGA Bayern Abänderung	147.1
France	SA.102058	Zones franches d'activité nouvelle génération	147.0
Romania	SA.102889	Hotărârea Guvernului nr. 807/2014 pentru instituirea unor scheme de ajutor de stat având ca obiectiv stimularea investițiilor cu impact major în economie, publicată în Monitorul Oficial al României, Partea I, nr.394/21.04.2022 (atasat)	128.4
France	SA.63903	Taux d'accise réduit sur le rhum "traditionnel" produit dans les départements d'outre-mer	118.7

12 Remedy for a serious disturbance in the economy

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Germany	SA.56790	Federal Framework "Small amounts of aid 2020" - COVID-19	16 228.4
Germany	SA.103791	Recapitalisation of Uniper SE	13 538.0
France	SA.56985	Régime cadre temporaire au soutien des entreprises dans la crise du Covid 19	8 510.0
Spain	SA.102454	TCF - Spain - MIBEL fossil fuel cost adjustment mechanism	6 453.3
Germany	SA.105001	Recapitalisation of SEFE GmbH	6 300.0
Germany	SA.100944	Prolongation and Modification of SA.62784	4 053.7
France	SA.100739	Amendment of the aid measure SA.59913: COVID-19 – Recapitalisation of Air France and the Air France – KLM Holding	3 593.0
France	SA.59913	COVID-19 – Recapitalisation of Air France and the Air France – KLM Holding	3 593.0
Austria	SA.56840	COVID-19 - Austrian liquidity assistance scheme	3 560.0

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Italy	SA.57429	COVID-19 - Tax exemptions and tax credits adopted as a consequence of the economic crisis caused by COVID-19	3 493.7
Germany	SA.102631	TCF: Umbrella schemes for guarantees on loans and subsidised loans	2 421.7
Italy	SA.101010	COVID-19: Prolongation of the schemes SA.56966, SA.61599, SA.62576, SA. 64217, SA.100204 and SA.100304	1 905.9
Germany	SA.59289	Fixkostenhilfe 2020 - DE - Covid	1 858.5
Italy	SA.61940	COVID-19: Partial exemption from the payment of social security contribution in disadvantaged areas.	1 632.0
Italy	SA.103289	Partial exemption from the payment of social security contribution in disadvantaged areas affected by the Russian aggression against Ukraine	1 618.5
Germany	SA.104606	TCF - Germany - Temporary cost containment of natural gas, heat and electricity price increases	1 600.0
France	SA.61330	COVID-19: Régime d'aides destinées à compenser les coûts fixes non couverts des entreprises	1 470.0
Netherlands	SA.100829	COVID-19: Sixth amendment of the direct grant scheme to support the fixed costs for enterprises affected by the COVID-19 outbreak (amendments to SA.57712, SA.59535, SA.60166, SA.62241, SA.63257 and SA.63984)	1 359.8
France	SA.102395	TCF: Guaranteed State Loans "Resilience"	1 107.5
Italy	SA.62668	COVID-19 - IT - Automatic tax measures and non-repayable grants	1 050.2
Italy	SA.101025	COVID-19: reintroduction of the measures and increase of the aid ceilings related to the measures 3.1 and 3.12 of the Temporary Framework	952.9
Italy	SA.64420	COVID-19: Exemption from contribution for hiring young people	945.5
Spain	SA.57659	ES - COVID 19 - Recapitalisation fund	921.0
Netherlands	SA.101892	COVID-19: Eighth amendment of the direct grant scheme to support the fixed costs for enterprises affected by the COVID-19 outbreak (amendments to SA.57712, SA.59535, SA.60166, SA.62241, SA.63257, SA.63984, SA.100829 and SA.101235)	920.3
Germany	SA.56814	Covid-19 measures of the Wirtschaftsstabilisierungsfonds	843.0

13 Rescue & Restructuring

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Romania	SA.59974	Restructuring aid to Complexul Energetic Oltenia S.A.	542.5
Portugal	SA.60165	Restructuring aid to TAP SGPS	304.0
Poland	SA.64760	Restructuring aid to RAFAKO S.A.	21.3
Poland	SA.58255	Prolongation of the "Polish rescue and restructuring aid scheme for SMEs"	11.2
Germany	SA.63666	Germany - Restructuring of Flughafen Friedrichshafen	1.4
Germany	SA.59319	Prolongation of German R&R scheme for SMEs in difficulty	0.2
Austria	SA.41372	Restructuring aid scheme "TOP-Tourismus-Förderung, Teil D"	0.1
Austria	N 521/2009	Prolongation of N 72/2007 – Prolongation of the restructuring aid scheme TOP-Tourismus-Förderung, Teil D (TOP-Restrukturierung)	0.0

14 Research, development and innovation

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Netherlands	SA.63039	NL_BZK_CSDO_UT Uitvoeringsverordening MKB Innovatiestimulering Topsectoren provincie Utrecht	1 589.0
France	SA.40391	Régime cadre RDI 2014-2020 - plan d'évaluation	1 066.7
Belgium	SA.20326	Mesures de dispense partielle de précompte professionnel en faveur de la R&D	960.6
France	SA.59366	France: quant au régime d'aides exemptées de notification relatif aux aides à la recherche et au développement pour la décarbonation, la compétitivité et la sécurité du transport aérien pour la période 2020-2023	447.8
Spain	SA.64685	Spain: RRF - Integrated aid measures to support the electric and connected vehicle value chain (ECV PERTE)	338.8
France	SA.58995	Régime cadre exempté de notification relatif aux aides à la recherche, au développement et à l'innovation (RDI) pour la période 2014-2023	317.4

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
France	SA.101608	Crédit d'impôt Innovation	303.0
Belgium	SA.52328	Décret wallon sur l'innovation	231.7
Finland	SA.58492	Business Finlandin tukiohjelman tutkimus- ja kehittämishankkeisiin	214.6
Netherlands	SA.47187	NL-EZ-B&I/I&K wijzing van de Regeling nationale EZ-subsidies, houdende een wijziging van titel 3.2 betreffende de TKI toeslag	183.9
Germany	SA.55829	Federal R&D aid scheme for the aeronautics sector - (LuFo VI)	173.5
Germany	SA.56245	Germany - block exempted R&D tax incentive scheme "Forschungszulagengesetz"	155.0
Germany	SA.52338	7. Energieforschungsprogramm der Bundesregierung "Innovationen für die Energiewende" - hier: Förderbekanntmachung des BMWi zur angewandten nichtnuklearen Forschungsförderung	136.0
Spain	SA.45828	INV - Régimen de CDTI de ayudas a proyectos de I+D	135.4
Germany	SA.63988	Zentrales Innovationsprogramm Mittelstand (ZIM)	131.2
Poland	SA.58757	Udzielanie pomocy publicznej za pośrednictwem Narodowego Centrum Badań i Rozwoju	130.2
Belgium	SA.63756	Besluit Ontwikkeling en Innovatie	107.8
Hungary	SA.63848	Kutatás-fejlesztési és innovációs támogatás a Gazdaságfejlesztési és Innovációs Operatív Programból (GINOP) - meghosszabbítás	95.5
Ireland	SA.39318	Research Development and Innovation Group Block Exemption Scheme 2014- 2020	90.6
Portugal	SA.41942	Investigação e Desenvolvimento Tecnológico	89.1
Sweden	SA.60496	Statligt stöd till forskning och utveckling samt innovation	88.5
Austria	SA.101861	FFG-Industrie-Richtlinie, 2022	86.6
Italy	SA.60800	Intervento del Fondo per la crescita sostenibile a favore dei progetti di ricerca e sviluppo negli ambiti tecnologici del Programma Horizon 2020	83.3
Belgium	SA.63753	Besluit O&O Kennisintensief	79.8
Germany	SA.62747	BMW-Programm "Neue Fahrzeug und Systemarchitekturen"	79.2

15 Sectoral development

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
France	C 25/2008	Retraites France Télécom - FR	2 705.0
Sweden	SA.100169	Aid scheme for rental housing – amendments to SA.56305	493.9
Spain	SA.103451	RRF - ES- Deployment of backhaul networks for mobile connectivity	450.0
Germany	SA.51956	Partial financing of rail infrastructure charges	380.4
Portugal	SA.62043	Restructuring aid to SATA	299.9
Germany	SA.103584	Förderung der Landstromanlage Binnenschifffahrt Aue Hauptdeich [HH]	264.0
Spain	SA.62696	RRF - Extension of Broadband Scheme for NGA White and Grey Areas	244.6
France	SA.59258	Régime d'aides exempté de notification relatif aux aides à l'investissement en faveur des infrastructures dans les ports maritimes et intérieurs, de leurs voies d'accès et du dragage d'investissement	178.0
Italy	SA.50545	Amendments to the Italian Tonnage Tax Scheme	166.1
Ireland	SA.54472	National Broadband Plan - IE	162.9
Denmark	SA.31227	Legislative Proposal L 203 on Gaming Duties	145.8
Denmark	SA.51325	Extension of the Danish DIS seafarer regime to certain specialized vessels	127.7
Sweden	SA.46740	Sjöfartsstöd - Tax deduction scheme for seafarers	126.2
Sweden	SA.101764	Statligt stöd för utbyggnad av bredbandsinfrastruktur	117.9
Netherlands	NN 98/1997	Tonnage Tax	115.0
France	SA.30481	State Aid in favour of Agence France-Press (AFP)	113.3
Sweden	SA.57781	Modifications of the Press and Media Aid schemes – Sweden	100.5
France	SA.59259	Régime d'aides exempté de notification relatif aux aides au dragage d'entretien dans les ports maritimes et intérieurs	93.1
Spain	NN 155/1997	Reduction in Corporate Tax in the Canary Islands Ship Register	92.7
France	SA.63902	France - Taxe affectée au financement de l'amélioration de l'espèce équine et de la promotion de l'élevage, de la formation dans le secteur des courses et de l'élevage chevalin ainsi que du développement rural	85.0
Spain	SA.102847	RRF- Spain - Support for connectivity in rural areas	84.8

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Austria	SA.58261	Broadband Austria 2020 Prolongation-AT	79.4
Finland	SA.35110	Prolongation of the reimbursement scheme for social security costs and costs related to personal income taxation in the maritime transport sector	75.8
Austria	SA.41175	Broadband Austria 2020	74.5
Hungary	SA.38454	Possible aid to the Paks nuclear power station	71.6

16 SMEs including risk capital

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Italy	SA.60799	Finanziamenti per l'acquisto di nuovi macchinari, impianti e attrezzature da parte delle piccole e medie imprese.	899.9
Portugal	SA.102007	RRF - Share capital increase of Banco Português de Fomento	250.0
Italy	SA.60791	Fondo di garanzia per le piccole e medie imprese (proroga)	192.6
France	SA.100943	Modification du dispositif « IR-PME » de réduction d'impôt sur le revenu (IR) pour la souscription au capital de PME par l'intermédiaire de fonds communs de placement dans l'innovation (FCPI) et de fonds d'investissement de proximité (FIP) ou par investissements directs dans les entreprises solidaires d'utilité sociale (ESUS).	146.0
Germany	SA.51198	Richtlinien zur Durchführung des bayerischen regionalen Förderprogramms für die gewerbliche Wirtschaft (BRF)	124.9
Italy	SA.48570	Fiscal incentives for investments in innovative start-ups and innovative SMEs	118.0
Portugal	SA.60763	Dedução por lucros retidos e reinvestidos	116.9
France	SA.59106	Régime cadre exempté de notification relatif aux aides en faveur des PME pour la période 2014-2023	91.5
Italy	SA.102644	Fondo impresa femminile	72.6
France	SA.34420	Modification du FNA	49.2
Poland	SA.64594	Pomoc finansowa udzielana przez Polską Agencję Rozwoju Przedsiębiorczości w ramach osi I Przedsiębiorcza Polska Wschodnia Programu Operacyjnego Polska Wschodnia 2014-2020	44.4
Portugal	SA.41943	Qualificação e Internacionalização PME	44.2

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Germany	SA.101541	Bund-Länder-Gemeinschaftsaufgabe "Verbesserung der regionalen Wirtschaftsstruktur" – gewerbliche Wirtschaft [BMWi]	41.9
Germany	SA.100213	Richtlinie über die Gewährung von Zuwendungen zur Förderung von Einzel-, Gemeinschafts- und Verbundvorhaben im Forschungs-, Entwicklungs- und Innovationsbereich (FEI-Richtlinie-FEI RL). Gemeinsamer Runderlass des Ministeriums für Kultur und Wissenschaft, der Staatskanzlei, des Ministeriums für Wirtschaft, Innovation, Digitalisierung und Energie, des Ministeriums für Umwelt, Landwirtschaft, Natur- und Verbraucherschutz und des Ministeriums für Verkehr vom 2. Juli 2021	40.6
Poland	SA.60659	Pomoc udzielana w ramach Programu Operacyjnego Inteligentny Rozwój na finansowanie ryzyka i dla przedsiębiorców rozpoczynających działalność.	38.9
Italy	SA.61548	Aiuti alle imprese LP 6/99 - proroga SA.40795	35.9
Belgium	SA.61806	Incitants régionaux en faveur des PME	35.2
Italy	SA.51064	Credito d'imposta per le piccole e medie imprese che iniziano una procedura di ammissione alla quotazione in un mercato regolamentato o in sistemi multilaterali di negoziazione	35.0
Portugal	SA.46167	Linha de Crédito com Garantia Mútua - Programa Capitalizar Portugal 2020	34.4
France	SA.40390	Régime cadre exempté de notification relatif aux aides en faveur de l'accès des PME au financement pour la période 2014-2020	34.4
Croatia	SA.102407	Program dodjele državnih potpora za mjeru C1.1.2. R2-I5 Komercijalizacija inovacija (MINGOR)	33.9
Germany	SA.59267	INVEST - Direct grants for risk capital investments – Prolongation and Amendment of the INVEST Guidelines	31.3
Luxembourg	SA.52240	Régime d'aides en faveur des PME	26.8
Italy	SA.56029	Aiuti per gli investimenti a favore delle imprese di autotrasporto	23.0
Poland	SA.58757	Udzielanie pomocy publicznej za pośrednictwem Narodowego Centrum Badań i Rozwoju	22.8

17 Social support to individual consumers

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
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Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
France	C 43/2006	réforme du mode de financement des retraites des fonctionnaires de l'Etat rattachés à La Poste	4 324.0
Spain	SA.101900	TRTEL-Subvenciones al transporte aéreo de residentes en regiones alejadas	736.3
Spain	SA.102038	TRTEL-Subvenciones al transporte marítimo de residentes en regiones alejadas	194.6
Spain	SA.60614	TRTEL - Bonificaciones al transporte marítimo interinsular e intrainsular de viajeros residentes en Canarias (prórroga ayuda SA.45138)	47.9
Italy	SA.57495	Broadband vouchers for certain categories of families – Italy	30.3
France	SA.39987	Modification of a social aid scheme for the benefit of certain French overseas territory residents	27.8
France	SA.60129	Dispositif régional de continuité territoriale	15.4
France	N 911/2006	Aide à la protection sociale complémentaire des agents de l'État	13.4
Italy	SA.53376	Liberation of the 700 MHz band - Reception aid to low income households - Italy	12.9
Spain	SA.100138	RRF - Spain- RRF – Social connectivity vouchers for economically vulnerable categories of end-users	10.0
Portugal	SA.102944	Subsídio em benefício do passageiro residente na Região Autónoma dos Açores	6.8
France	N 628/2008	Aide à la protection sociale complémentaire des militaires	5.1
France	SA.33966	Aide à caractère social pour les dessertes maritimes exploitées entre la Guadeloupe et les îles	4.5
France	N 495/2010	Aide à la protection sociale complémentaire	3.2
Portugal	SA.63703	Subsídio social de mobilidade nas ligações entre a ilha da Madeira e o Porto Santo	2.7
Greece	SA.53520	Primary Residence Protection Scheme	2.2
Cyprus	SA.49554	Cypriot scheme for non-performing loans collateralized with primary residences (Estia)	1.0
Italy	SA.64250	Aiuto a carattere sociale per l'acquisto di biglietti aerei sulle rotte dell'Unione europea da e per gli scali di Palermo e Catania a favore di particolari categorie di soggetti residenti nella Regione Siciliana.	0.6
Germany	SA.64524	Prolongation of the exemption from air transport tax as regards flights of people domiciled on islands and other cases	0.2
Poland	SA.101365	Provision of postal services exempt from postal charges	0.1

18 Training

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
Italy	SA.51163	Credito d'imposta per la formazione per le tecnologie abilitanti - Industria 4.0	417.2
Italy	SA.100284	Regolamento per i fondi interprofessionali per la formazione continua per la concessioni di aiuti di stato esentati ai sensi del regolamento CE n.651/2014 e in regime de minimis ai sensi del regolamento CE n.1407/2013	302.1
France	SA.58981	Régime cadre exempté de notification relatif aux aides à la formation pour la période 2014-2023	140.6
Netherlands	SA.104113	NL_VWS__SG_MEVA_SP/120980/2022	67.7
Netherlands	SA.61349	Subsidie opleidingen SectorplanPlus	55.7
Ireland	SA.59379	Skillnets Training Network Programme	49.7
Germany	SA.44345	Förderrichtlinie Ausbildung zum Berufskraftfahrer/in in Unternehmen des Güterkraftverkehrs mit schweren Nutzfahrzeugen	40.8
Netherlands	SA.103735	NL_VWS_[DG]_CZ	27.8
Ireland	SA.39312	Training Support Scheme 2014-2020 (General Block Exemption Regulation)	20.8
Belgium	SA.60021	Strategische transformatiesteun aan ondernemingen in het Vlaamse Gewest	14.0
Germany	SA.41881	ESF-Bundesprogramm "Fachkräfte sichern: weiter bilden und Gleichstellung fördern" (Sozialpartnerrichtlinie)	12.3
Germany	SA.58473	Bundesprogramm "Zukunftszentren (KI)" [BMAS]	11.4
Germany	SA.54301	ESF-Bundesprogramm "Zukunftszentren"	9.8
Lithuania	SA.60634	2014–2020 metų Europos Sąjungos fondų investicijų veiksmų programos 9 prioriteto „Visuomenės švietimas ir žmogiškųjų išteklių potencialo didinimas“ priemonės Nr. 09.4.3-ESFA-K-827 „Pameistrystė ir kvalifikacijos tobulinimas darbo vietoje“	9.6
Germany	SA.64261	Kompetenzentwicklung von Beschäftigten durch Bildungsscheckverfahren	9.0
Spain	SA.64668	ASOC - FORMACIÓN DE TRABAJADORES OCUPADOS EN EMPRESAS DE SECTORES ESTRATÉGICOS DE LAS TECNOLOGÍAS AVANZADAS Y/O CIBERSEGURIDAD.	8.3
Belgium	SA.62680	Incitants financiers à la Formation des travailleurs occupés par les entreprises - XT392004 -	7.7

Member State	SA Number	Working Title	Expenditure 2022 (aid element) in EUR million
		Prolongation	
Germany	SA.42650	Richtlinie über die Gewährung von Zuwendungen zur Förderung von Maßnahmen im Rahmen des Programms "Weiterbildung in Niedersachsen"	6.0
Austria	SA.63466	Qualifizierungsförderung für Beschäftigte (QBN), Verlängerung	5.9
Hungary	SA.101035	A GINOP Plusz 3.2.1-21 - "A munkavállalók alkalmazkodóképességének és termelékenységének javítása a munkaerő fejlesztésén keresztül" megnevezésű pályázati felhívással kapcsolatban nyújtott támogatások	5.8
Germany	SA.45189	Förderrichtlinie Weiterbildung in Unternehmen des Güterkraftverkehrs mit schweren Nutzfahrzeugen	5.7
Spain	SA.102971	IND - Línea de actuación integral sobre la cadena de valor industrial (PERTE Vehículo Eléctrico y Conectado) (MRR)	5.6
Hungary	SA.103699	A foglalkoztatást elősegítő szolgáltatásokról és támogatásokról szóló 100/2021. (II. 27.) Korm. rendelet alapján nyújtott képzési támogatások	5.1
Italy	SA.20867	Aid to Carbusulcis S.p.a.	5.0
Italy	SA.56030	Incentivi a favore delle iniziative di formazione professionale nel settore dell'autotrasporto	4.6

Annex II. Focus on State aid expenditure in Member States

1 Country Focus on Austria in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

1.1 Case and Procedural Information

The total number of active measures corresponded to 339 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

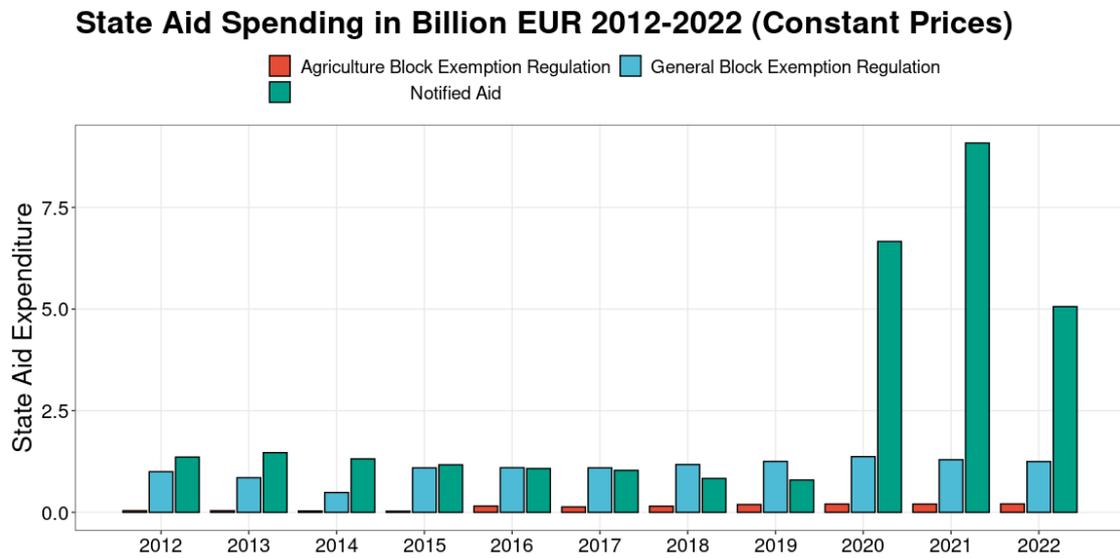
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	38	11.2%
Fisheries Block Exemption Regulation	3	0.9%
General Block Exemption Regulation	251	74.0%
Notified Aid	47	13.9%
Total	339	100.0%

In 2022, the number of GBER measures in Austria reached 74.0% of the total number of measures, with 85.9% of all newly implemented measured falling under GBER.

1.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Austria during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

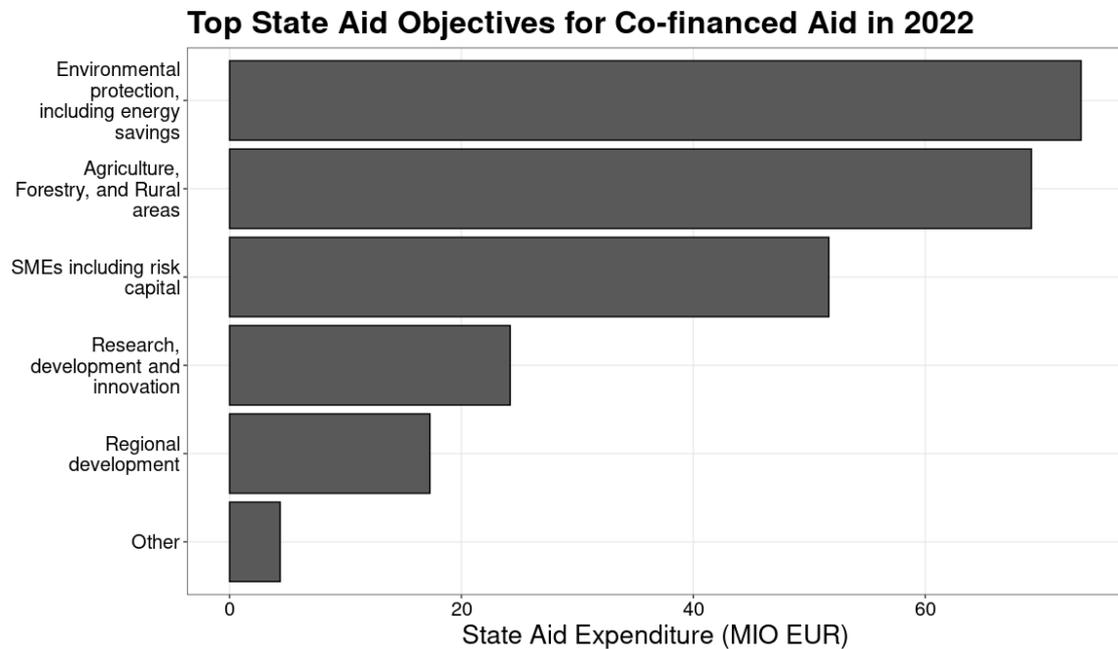


In 2022, the total State aid spending for Austria amounted to EUR 6.5 billion. The 5 biggest State aid measures absorbed 76.3% of the total spending i.e., EUR 5 billion.

Finally, the amount of aid co-financed with EU funds in Austria corresponded to EUR 240.2 million (around 3.7% of the total spending) and was mostly concentrated in Environmental protection, including energy savings (30.6%), Agriculture, Forestry, and Rural areas (28.8%) and SMEs including risk capital (21.5%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



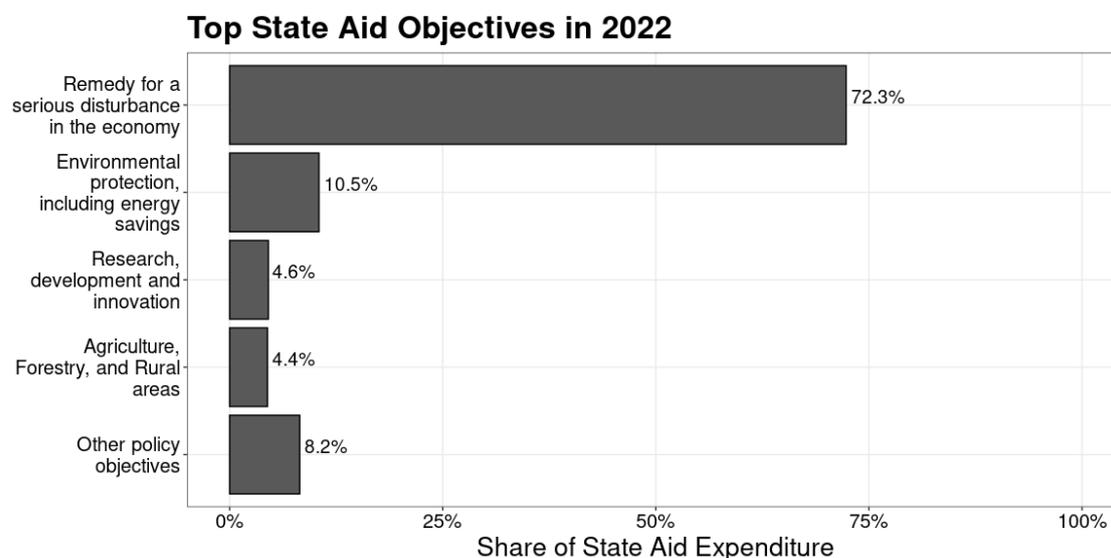
1.3 State Aid Spending - Top Objectives and Instruments

Around 82.8% of State aid spending in Austria was concentrated in two main policy objectives. Around 72.3% was directed towards “Remedy for a serious disturbance in the economy” while 10.5% to “Environmental protection, including energy savings”.

Furthermore, Austria devoted around 4.6% towards “Research, development and innovation” and 4.4% to “Agriculture, Forestry, and Rural areas”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 68.4% of the total GBER spending, as illustrated in Table 3.1.

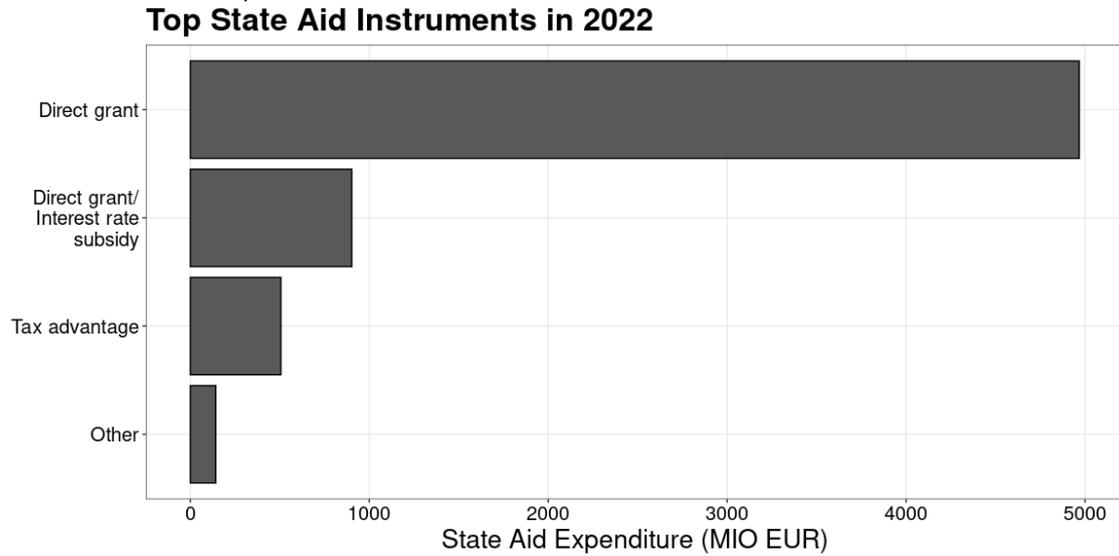
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	40.4%
Experimental development (Art. 25(2)©)	15.0%
Industrial research (Art. 25(2)(b))	6.6%
Investment aid to SMEs (Art. 17)	6.4%
Total top 4 GBER articles	68.4%

In terms of State aid instruments, Austria privileged the use of “Direct grant” (around EUR 5 billion, 76.2% of total State aid spending), followed by “Direct grant/ Interest rate subsidy” (EUR 902.2 million, 13.8% of total State aid spending), and “Tax advantage” (around EUR 506 million, 7.8% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

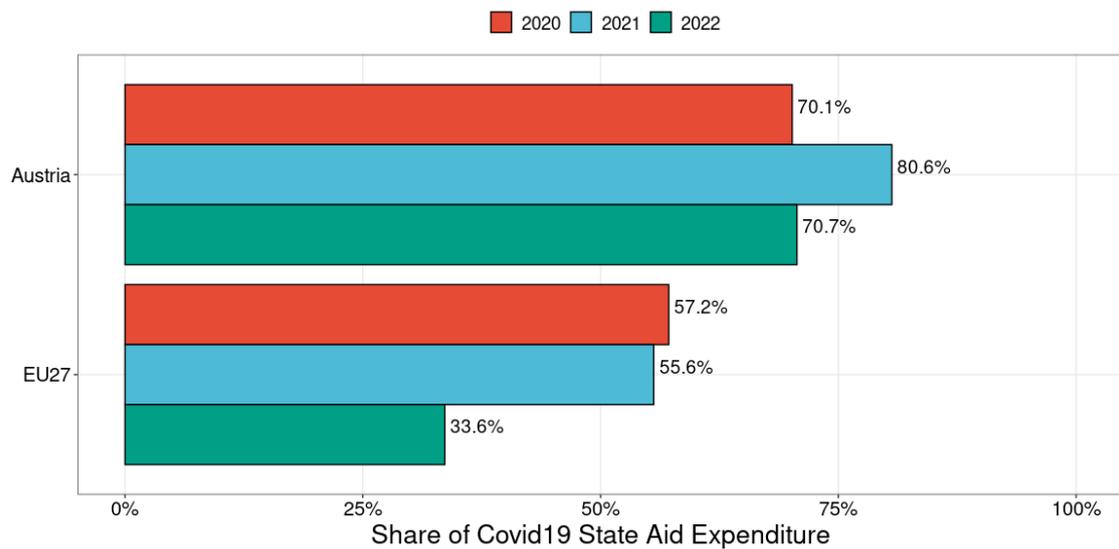
Figure 3.2: State aid expenditure for the main instruments.



1.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Austria amounted to EUR 4.6 billion i.e., 70.7% of the total State aid expenditure. In 2020 this amounted to EUR 5.3 billion, i.e., 70.1% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

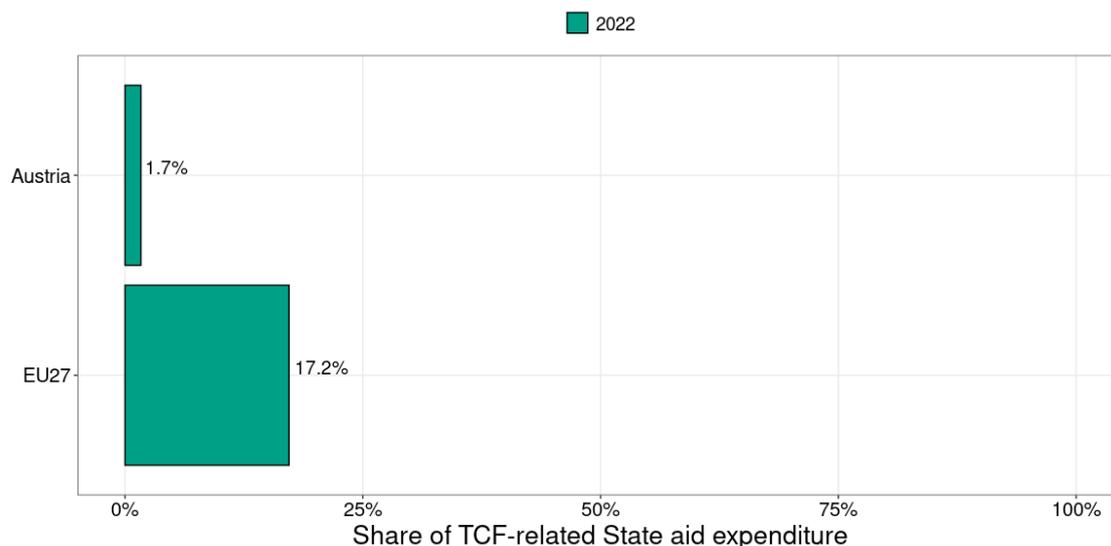


1.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Austria amounted to EUR 108.9 million i.e., 1.7% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



2 Country Focus on Belgium in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

2.1 Case and Procedural Information

The total number of active measures corresponded to 372 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	121	32.5%
General Block Exemption Regulation	195	52.4%
Notified Aid	56	15.1%

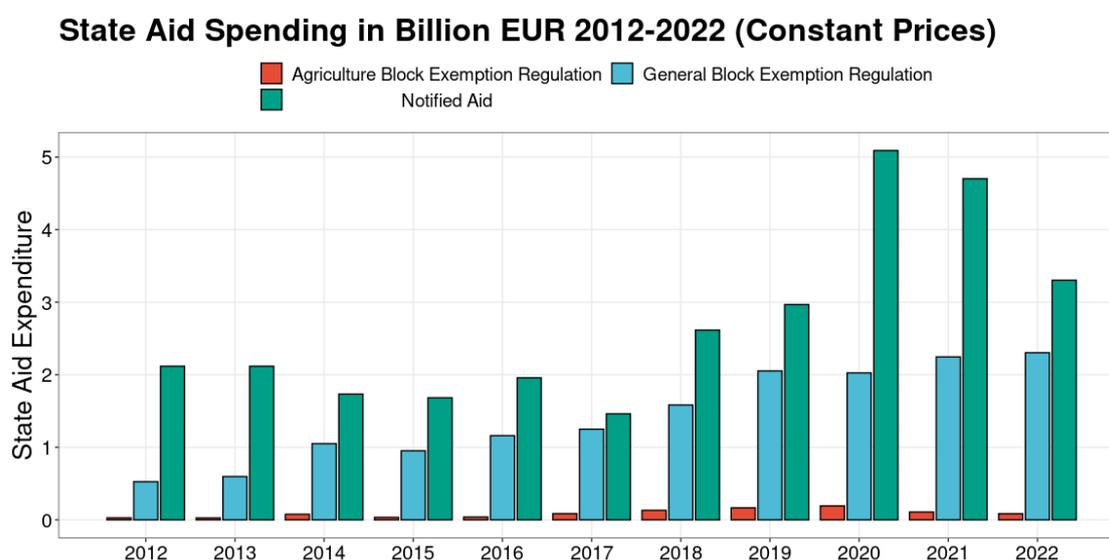
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Total	372	100.0%

In 2022, the number of GBER measures in Belgium reached 52.4% of the total number of measures, with 57.8% of all newly implemented measured falling under GBER.

2.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Belgium during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.



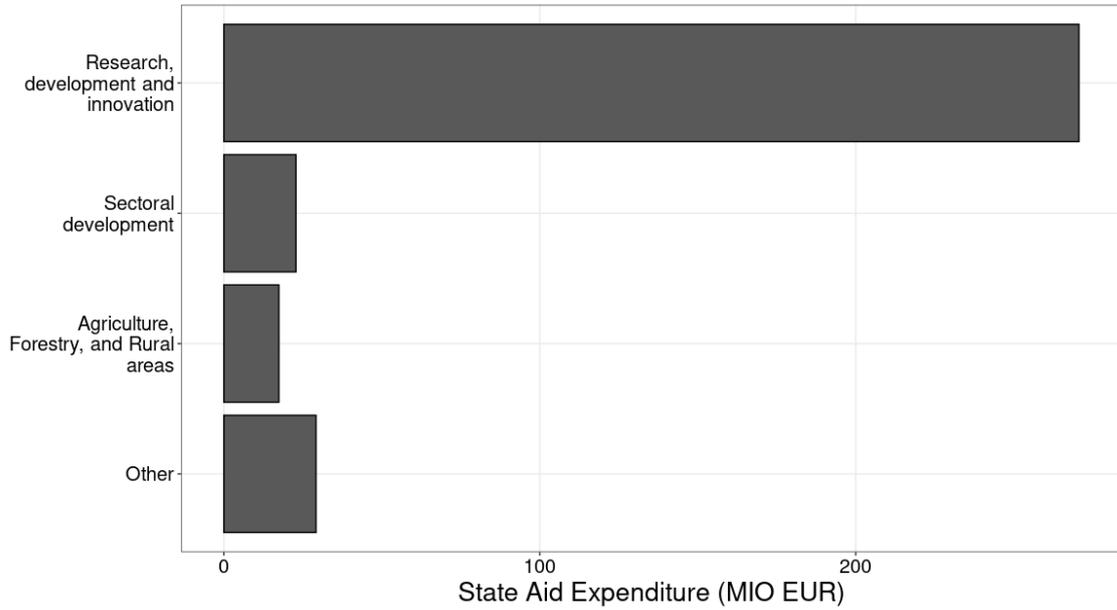
In 2022, the total State aid spending for Belgium amounted to EUR 5.7 billion. The 5 biggest State aid measures absorbed 55.8% of the total spending i.e., EUR 3.2 billion.

Finally, the amount of aid co-financed with EU funds in Belgium corresponded to EUR 340.1 million (around 6% of the total spending) and was mostly concentrated in Research, development and innovation (79.6%), Sectoral development (6.7%) and Agriculture, Forestry, and Rural areas (5.1%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.

Top State Aid Objectives for Co-financed Aid in 2022



2.3 State Aid Spending - Top Objectives and Instruments

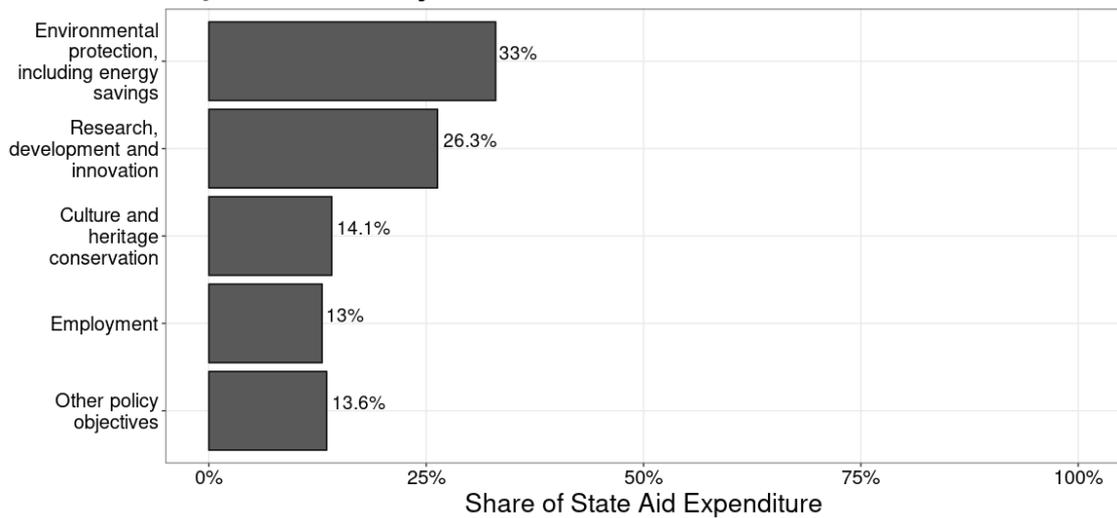
Around 59.3% of State aid spending in Belgium was concentrated in two main policy objectives. Around 33% was directed towards “Environmental protection, including energy savings” while 26.3% to “Research, development and innovation”.

Furthermore, Belgium devoted around 14.1% towards “Culture and heritage conservation” and 13% to “Employment”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.

Top State Aid Objectives in 2022



As to GBER, the top 4 key articles absorbed about 65.8% of the total GBER spending, as illustrated in Table 3.1.

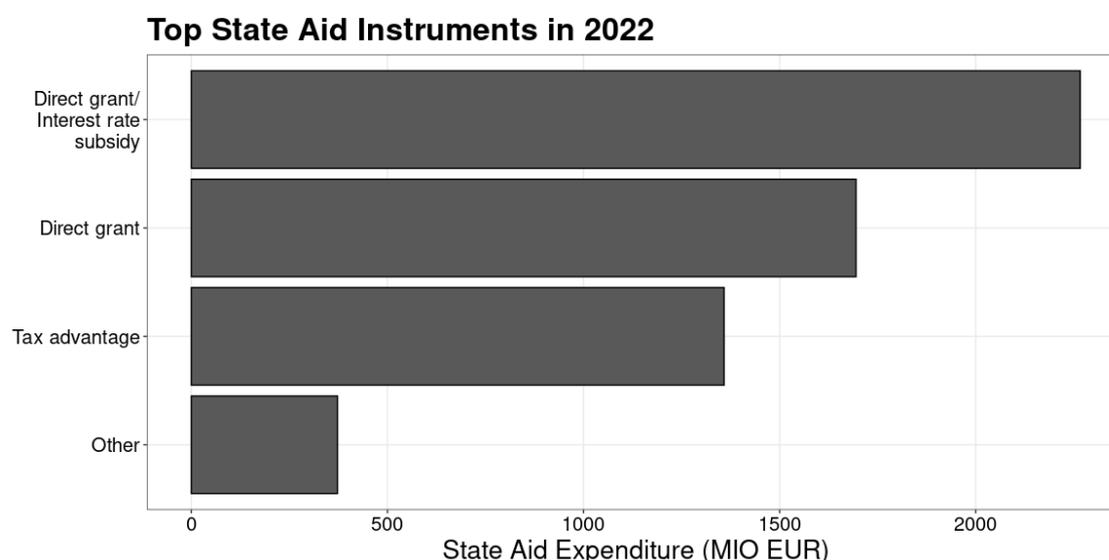
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid for culture and heritage conservation (Art. 53)	23.2%
Aid for the employment of workers with disabilities in the form of wage subsidies (Article 33)	21.7%
Experimental development (Art. 25(2)(c))	10.8%
Industrial research (Art. 25(2)(b))	10.1%
Total top 4 GBER articles	65.8%

In terms of State aid instruments, Belgium privileged the use of “Direct grant/ Interest rate subsidy” (around EUR 2.3 billion, 39.8% of total State aid spending), followed by “Direct grant” (EUR 1.7 billion, 29.8% of total State aid spending), and “Tax advantage” (around EUR 1.4 billion, 23.9% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

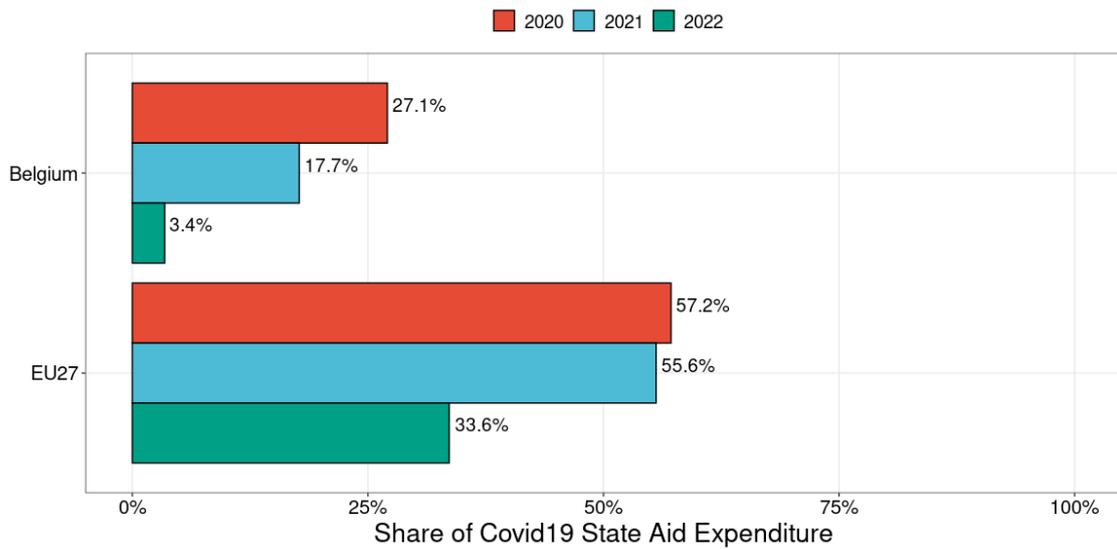
Figure 3.2: State aid expenditure for the main instruments.



2.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Belgium amounted to EUR 195.8 million i.e., 3.4% of the total State aid expenditure. In 2020 this amounted to EUR 1.8 billion, i.e., 27.1% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

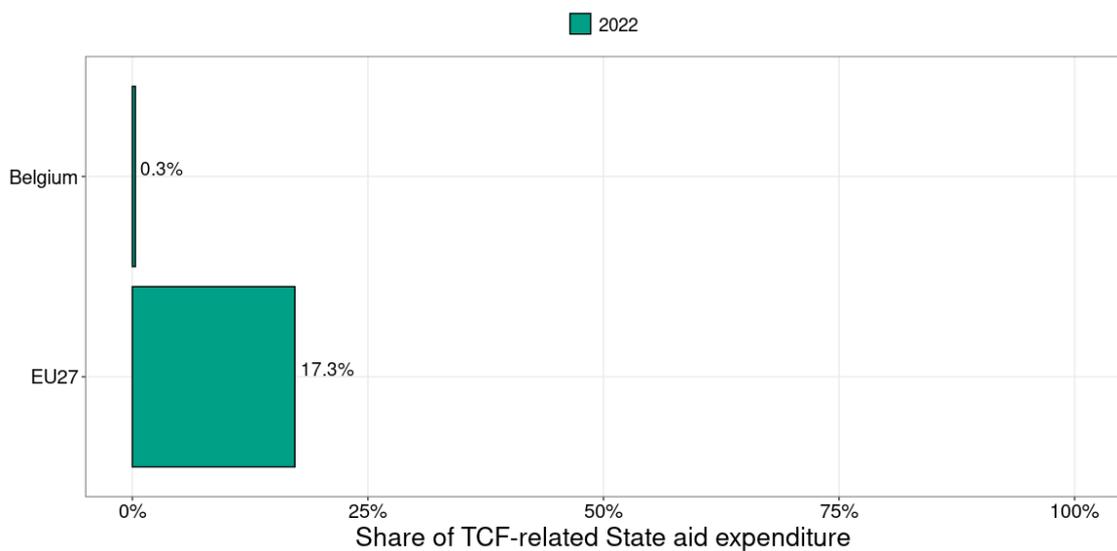


2.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Belgium amounted to EUR 18.6 million i.e., 0.3% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



3 Country Focus on Bulgaria in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

3.1 Case and Procedural Information

The total number of active measures corresponded to 69 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	19	27.5%
General Block Exemption Regulation	22	31.9%
Notified Aid	28	40.6%
Total	69	100.0%

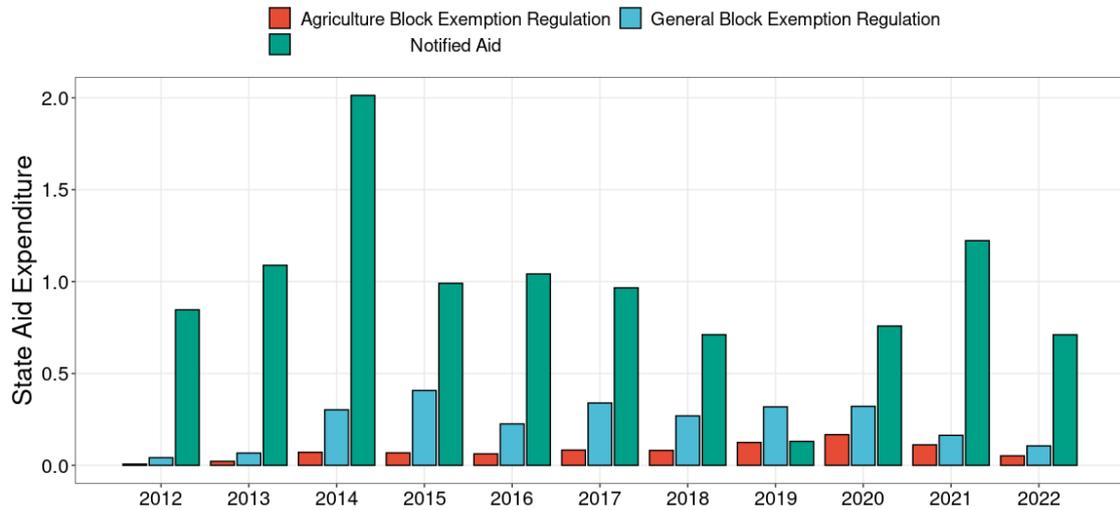
In 2022, the number of GBER measures in Bulgaria reached 31.9% of the total number of measures, with 28.6% of all newly implemented measures falling under GBER.

3.2 State Aid Spending – Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Bulgaria during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

State Aid Spending in Billion EUR 2012-2022 (Constant Prices)

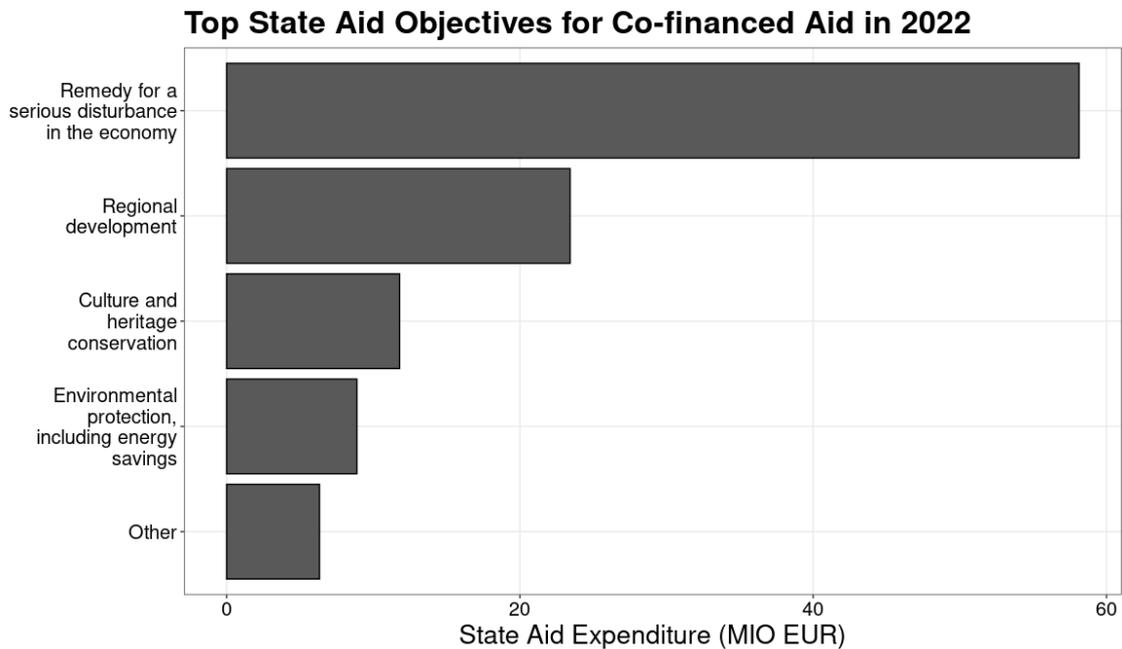


In 2022, the total State aid spending for Bulgaria amounted to EUR 0.9 million. The 5 biggest State aid measures in absorbed 64.1% of the total spending i.e., EUR 556.5million.

Finally, the amount of aid co-financed with EU funds in Bulgaria corresponded to EUR 108.6 million (around 12.5% of the total spending) and was mostly concentrated in Remedy for a serious disturbance in the economy (53.5%), Regional development (21.6%) and Culture and heritage conservation (10.9%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



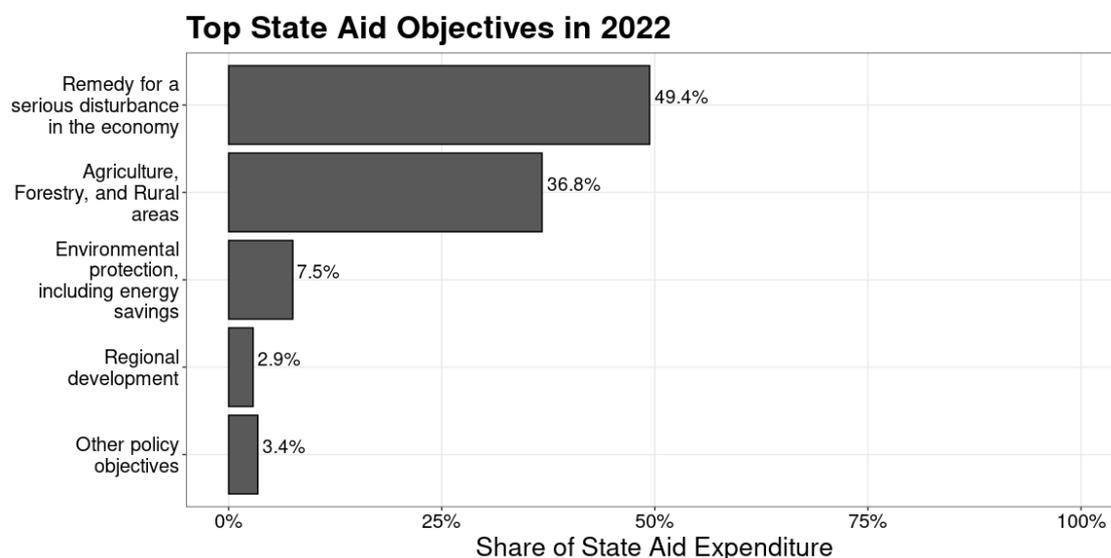
3.3 State Aid Spending - Top Objectives and Instruments

Around 86.2% of State aid spending in Bulgaria was concentrated in two main policy objectives. Around 49.4% was directed towards “Remedy for a serious disturbance in the economy” while 36.8% to “Agriculture, Forestry, and Rural areas”.

Furthermore, Bulgaria devoted around 7.5% towards “Environmental protection, including energy savings” and 2.9% to “Regional development”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 76.5% of the total GBER spending, as illustrated in Table 3.1.

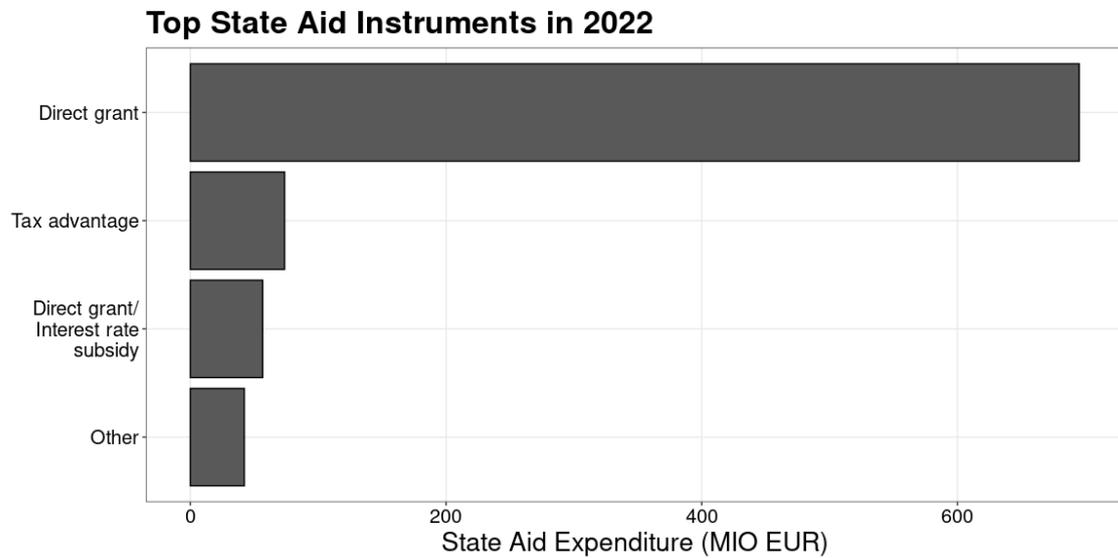
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	36.8%
Investment (AGRI)	17.5%
Regional aid – investment aid (Art. 14) – Scheme	13.3%
Aid for culture and heritage conservation (Art. 53)	8.9%
Total top 4 GBER articles	76.5%

In terms of State aid instruments, Bulgaria privileged the use of “Direct grant” (around EUR 695.3 million, 80.1% of total State aid spending), followed by “Tax advantage” (EUR 73.7 million, 8.5% of total State aid spending), and “Direct grant/ Interest rate subsidy” (around EUR 56.6 million, 6.5% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

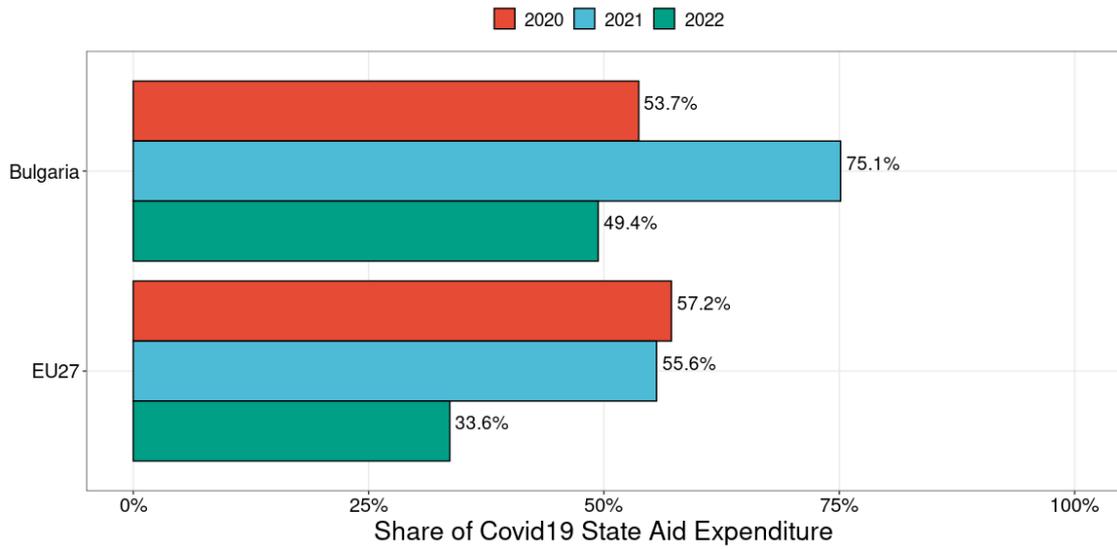
Figure 3.2: State aid expenditure for the main instruments.



3.4 State Aid Spending – Covid19

In 2022 the Covid19-related expenditure for Bulgaria amounted to EUR 428.7 million i.e., 49.4% of the total State aid expenditure. In 2020 this amounted to EUR 475.8 million, i.e., 53.7% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

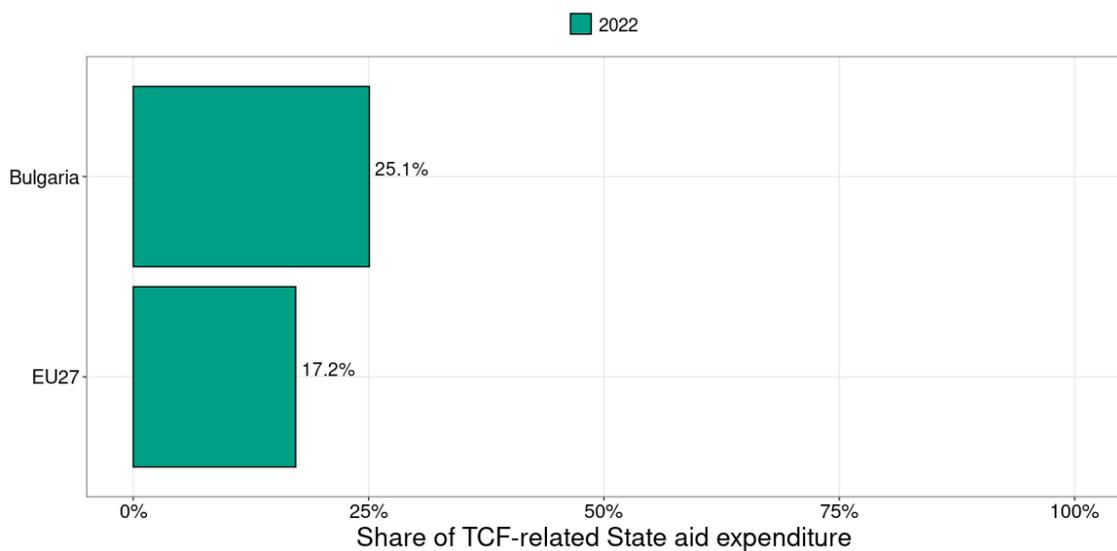


3.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Bulgaria amounted to EUR 217.7 million i.e., 25.1% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



4 Country Focus on Cyprus in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

4.1 Case and Procedural Information

The total number of active measures corresponded to 40 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	8	20.0%
General Block Exemption Regulation	13	32.5%
Notified Aid	19	47.5%
Total	40	100.0%

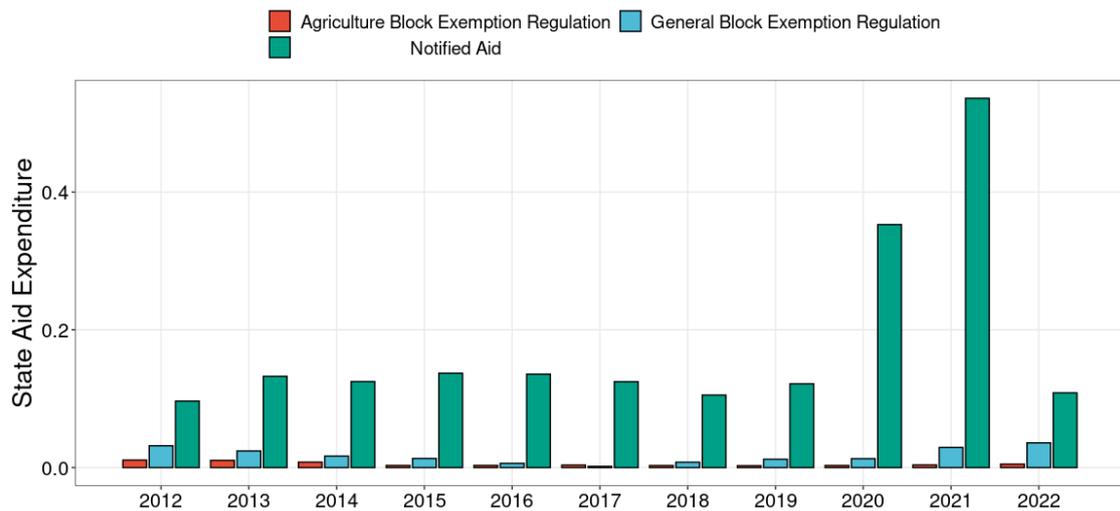
In 2022, the number of GBER measures in Cyprus reached 32.5% of the total number of measures, with 28.6% of all newly implemented measures falling under GBER.

4.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Cyprus during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

State Aid Spending in Billion EUR 2012-2022 (Constant Prices)

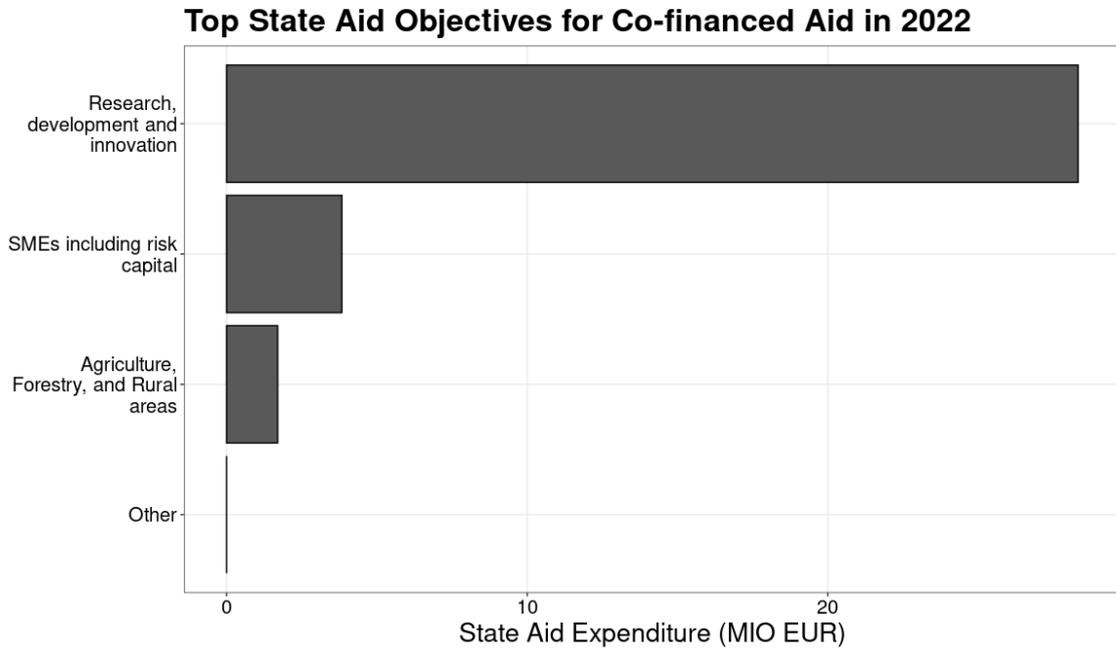


In 2022, the total State aid spending for Cyprus amounted to EUR 0.1 million. The 5 biggest State aid measures in absorbed 55.7% of the total spending i.e., EUR 83.2million.

Finally, the amount of aid co-financed with EU funds in Cyprus corresponded to EUR 33.9 million (around 22.7% of the total spending) and was mostly concentrated in Research, development and innovation (83.7%), SMEs including risk capital (11.3%) and Agriculture, Forestry, and Rural areas (5%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



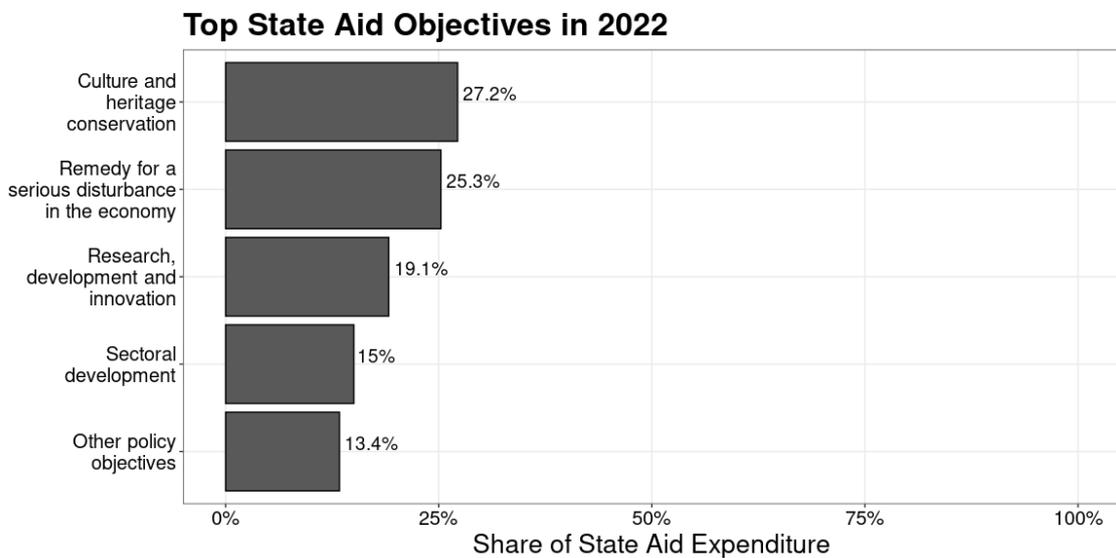
4.3 State Aid Spending - Top Objectives and Instruments

Around 52.5% of State aid spending in Cyprus was concentrated in two main policy objectives. Around 27.2% was directed towards “Culture and heritage conservation” while 25.3% to “Remedy for a serious disturbance in the economy”.

Furthermore, Cyprus devoted around 19.1% towards “Research, development and innovation” and 15% to “Sectoral development”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 78.7% of the total GBER spending, as illustrated in Table 3.1.

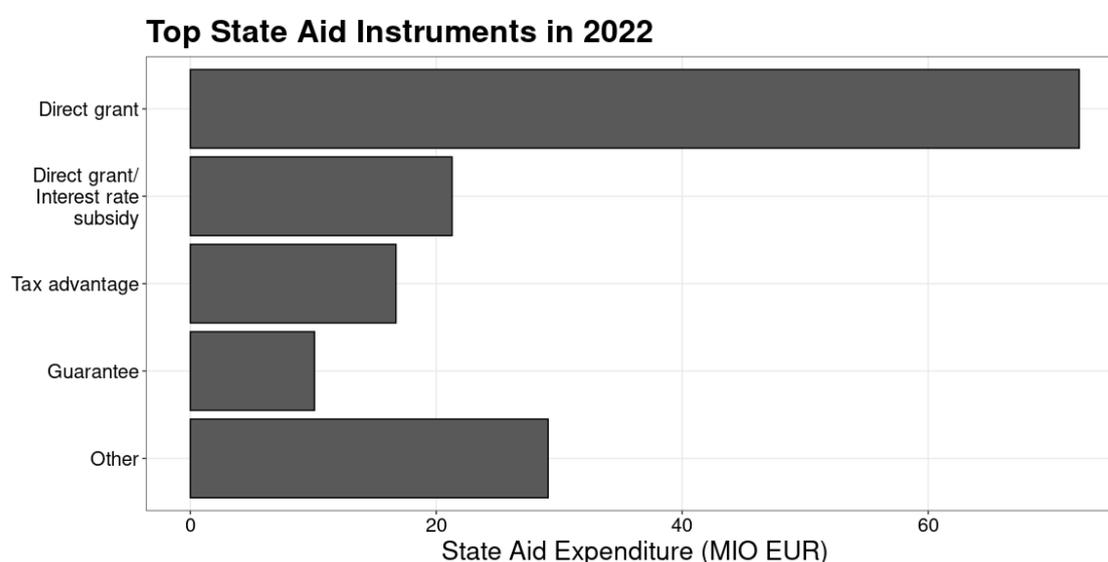
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Industrial research (Art. 25(2)(b))	27.7%
Fundamental research (Art. 25(2)(a))	22.2%
Experimental development (Art. 25(2)(c))	19.6%
Aid for start-ups (Art. 22)	9.2%
Total top 4 GBER articles	78.7%

In terms of State aid instruments, Cyprus privileged the use of "Direct grant" (around EUR 72.3 million, 48.4% of total State aid spending), followed by "Direct grant/ Interest rate subsidy" (EUR 21.3 million, 14.2% of total State aid spending), and "Other" (around EUR 20.4 million, 13.6% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

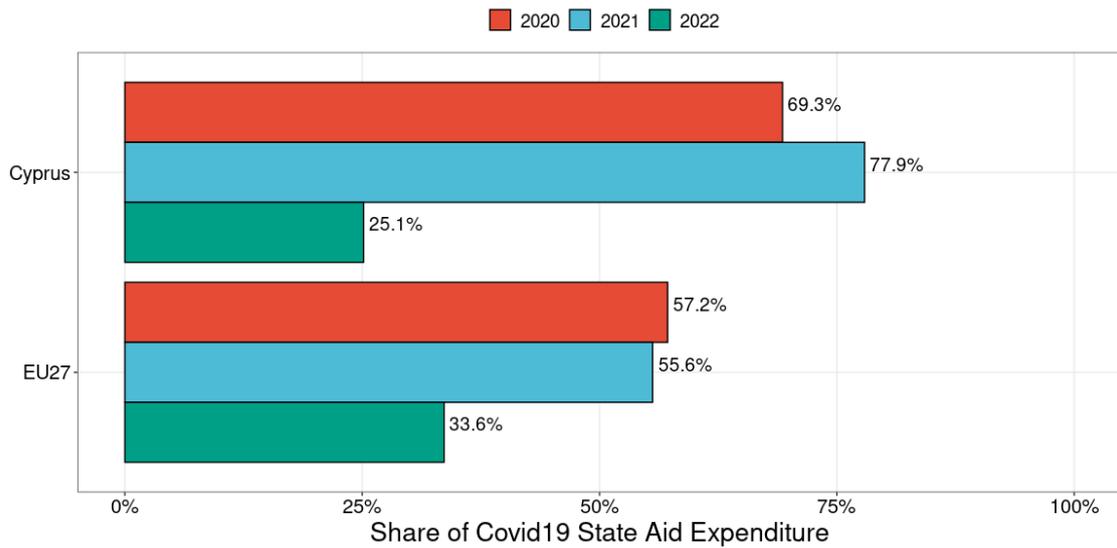
Figure 3.2: State aid expenditure for the main instruments.



4.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Cyprus amounted to EUR 37.6 million i.e., 25.1% of the total State aid expenditure. In 2020 this amounted to EUR 231 million, i.e., 69.3% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

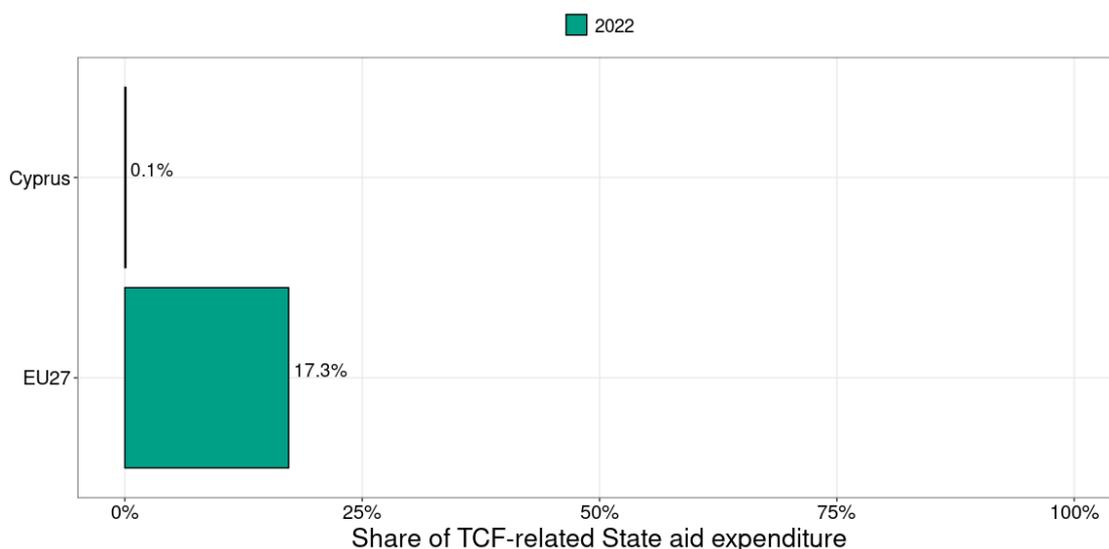


4.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Cyprus amounted to EUR 0.2 million i.e., 0.1% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



5 Country Focus on Czechia in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

5.1 Case and Procedural Information

The total number of active measures corresponded to 290 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

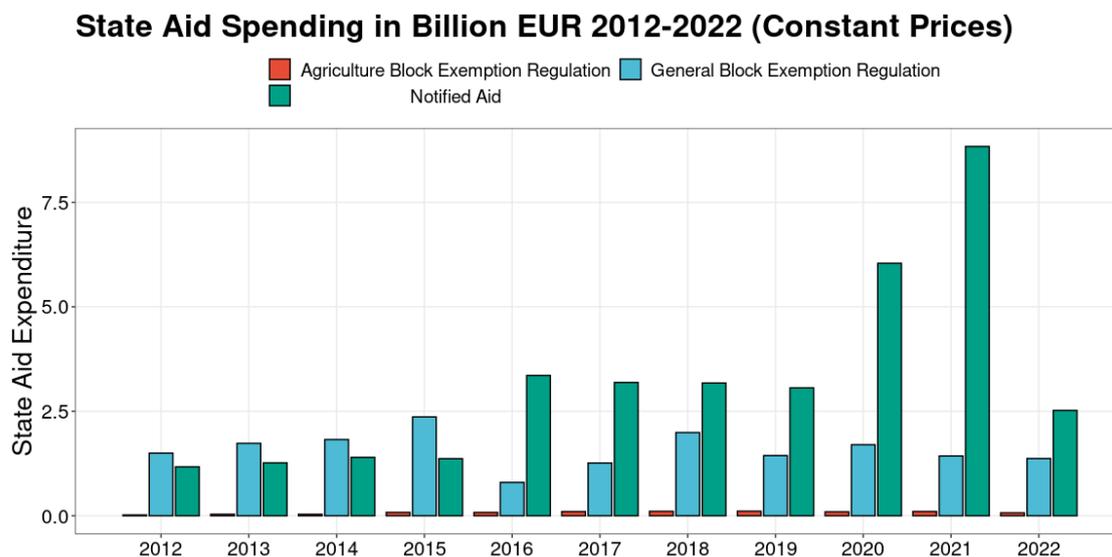
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	33	11.4%
General Block Exemption Regulation	186	64.1%
Notified Aid	71	24.5%
Total	290	100.0%

In 2022, the number of GBER measures in Czechia reached 64.1% of the total number of measures, with 78.1% of all newly implemented measured falling under GBER.

5.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Czechia during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

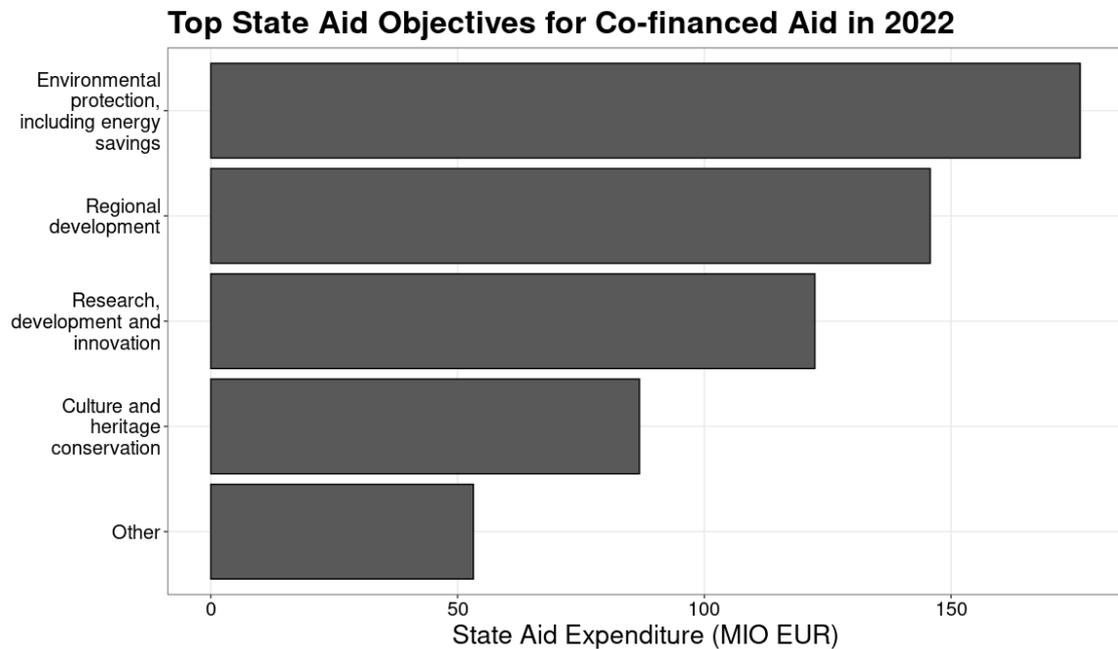


In 2022, the total State aid spending for Czechia amounted to EUR 4 million. The 5 biggest State aid measures absorbed 48.9% of the total spending i.e., EUR 1.9 billion.

Finally, the amount of aid co-financed with EU funds in Czechia corresponded to EUR 584.4 million (around 14.7% of the total spending) and was mostly concentrated in Environmental protection, including energy savings (30.2%), Regional development (24.9%) and Research, development and innovation (20.9%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



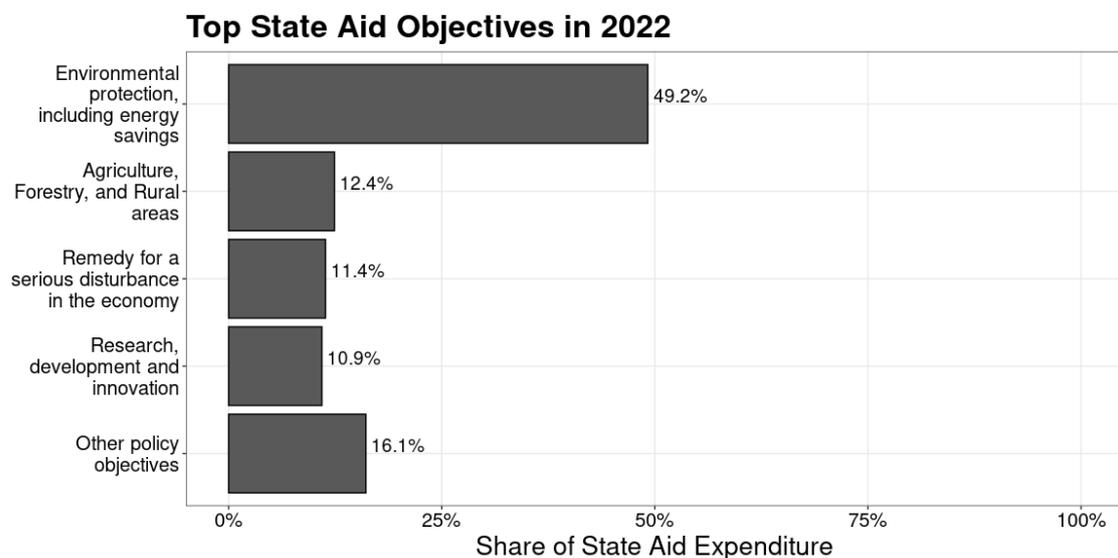
5.3 State Aid Spending - Top Objectives and Instruments

Around 61.6% of State aid spending in Czechia was concentrated in two main policy objectives. Around 49.2% was directed towards “Environmental protection, including energy savings” while 12.4% to “Agriculture, Forestry, and Rural areas”.

Furthermore, Czechia devoted around 11.4% towards “Remedy for a serious disturbance in the economy” and 10.9% to “Research, development and innovation”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 56.3% of the total GBER spending, as illustrated in Table 3.1.

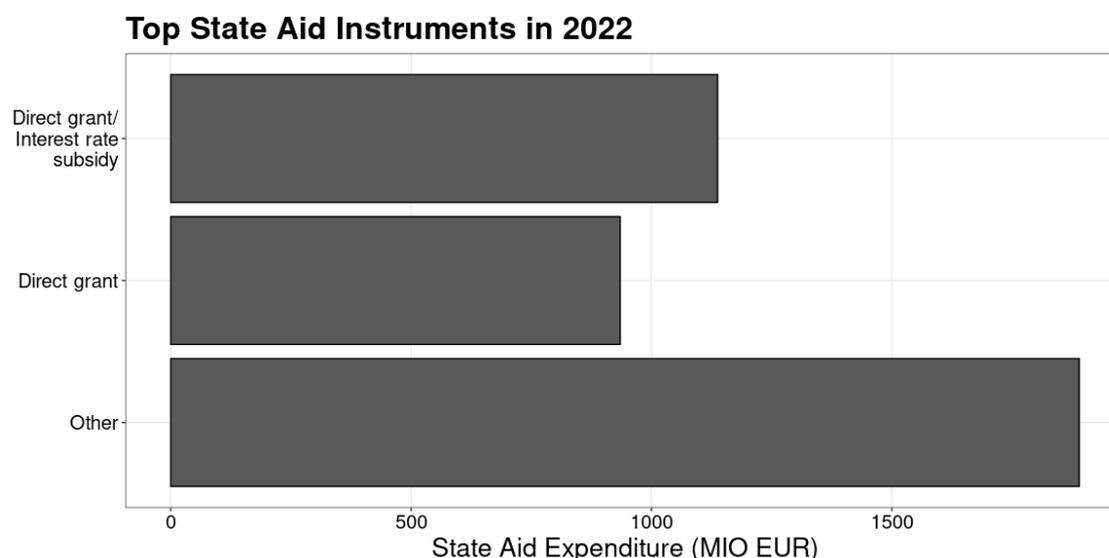
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Regional aid – investment aid (Art. 14) – Scheme	21.0%
Industrial research (Art. 25(2)(b))	16.3%
Aid for culture and heritage conservation (Art. 53)	11.2%
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	7.8%
Total top 4 GBER articles	56.3%

In terms of State aid instruments, Czechia privileged the use of “Other” (around EUR 1.6 billion, 40.2% of total State aid spending), followed by “Direct grant/ Interest rate subsidy” (EUR 1.1 billion, 28.7% of total State aid spending), and “Direct grant” (around EUR 934.9 million, 23.6% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

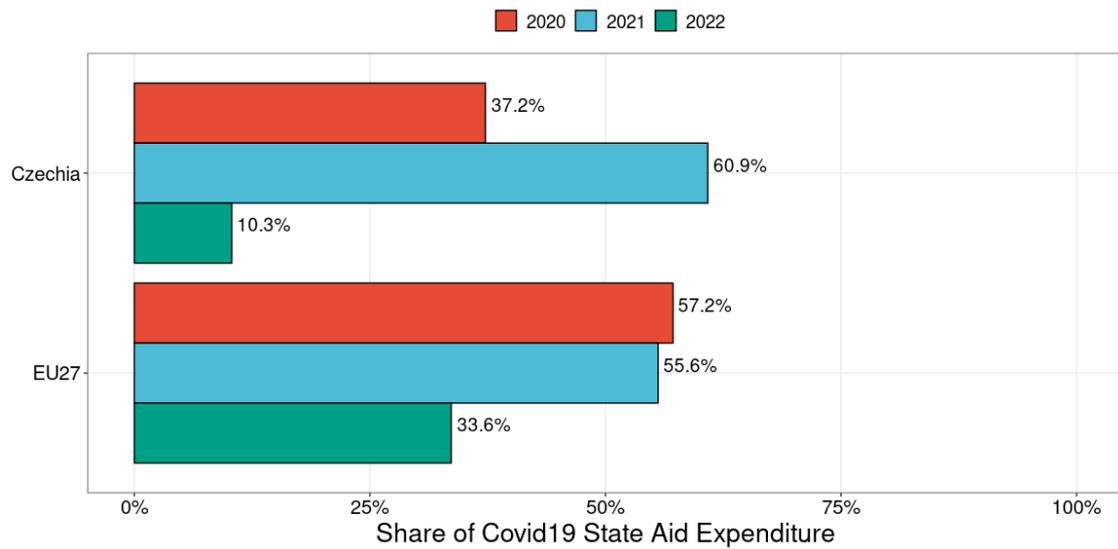
Figure 3.2: State aid expenditure for the main instruments.



5.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Czechia amounted to EUR 409.8 million i.e., 10.3% of the total State aid expenditure. In 2020 this amounted to EUR 2.2 billion, i.e., 37.2% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

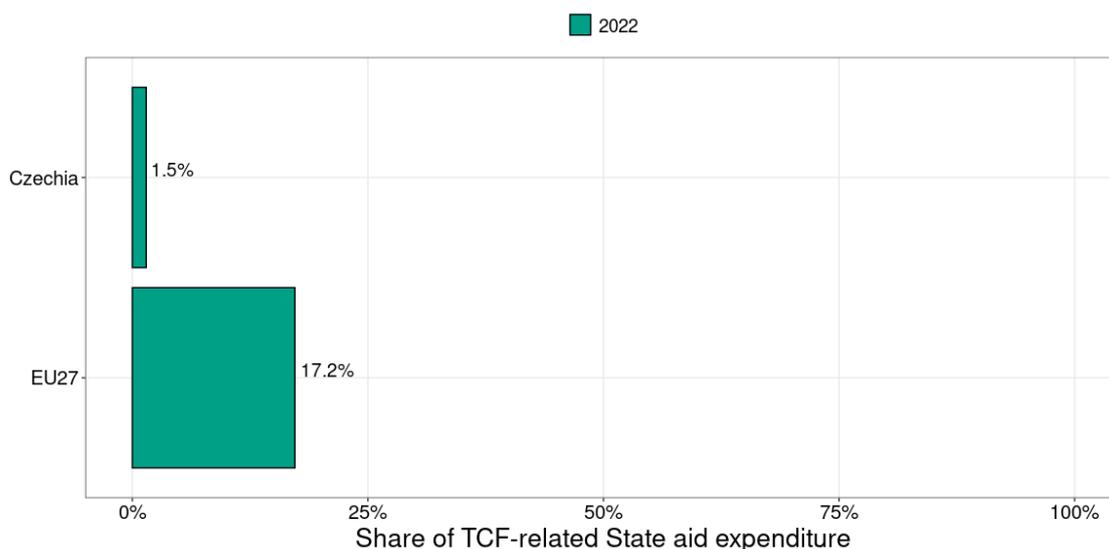


5.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Czechia amounted to EUR 58.4 million i.e., 1.5% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



6 Country Focus on Germany in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

6.1 Case and Procedural Information

The total number of active measures corresponded to 1609 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

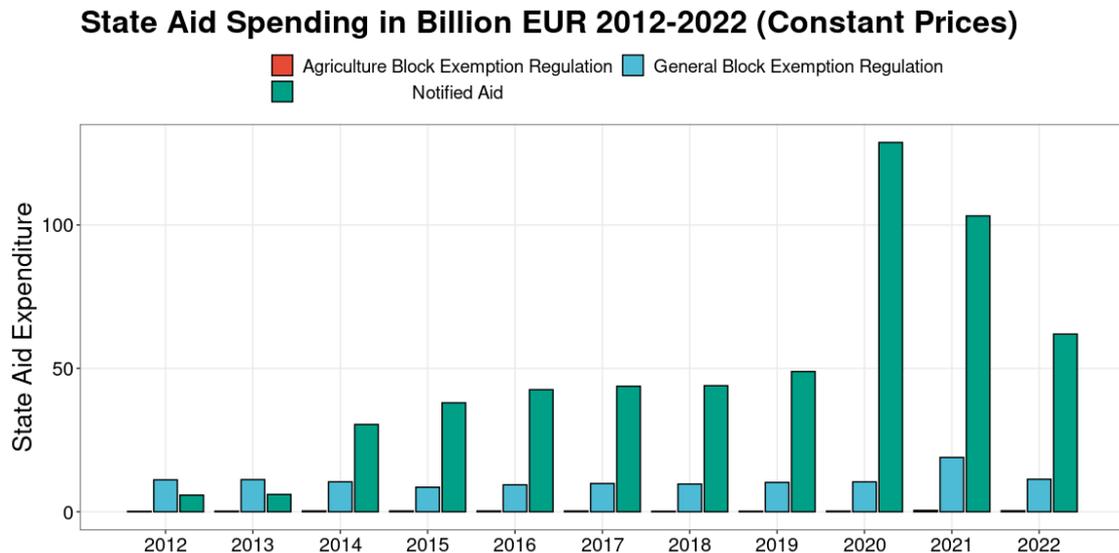
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	135	8.4%
Fisheries Block Exemption Regulation	6	0.4%
General Block Exemption Regulation	1,254	77.9%
Notified Aid	214	13.3%
Total	1,609	100.0%

In 2022, the number of GBER measures in Germany reached 77.9% of the total number of measures, with 85.3% of all newly implemented measures falling under GBER.

6.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Germany during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

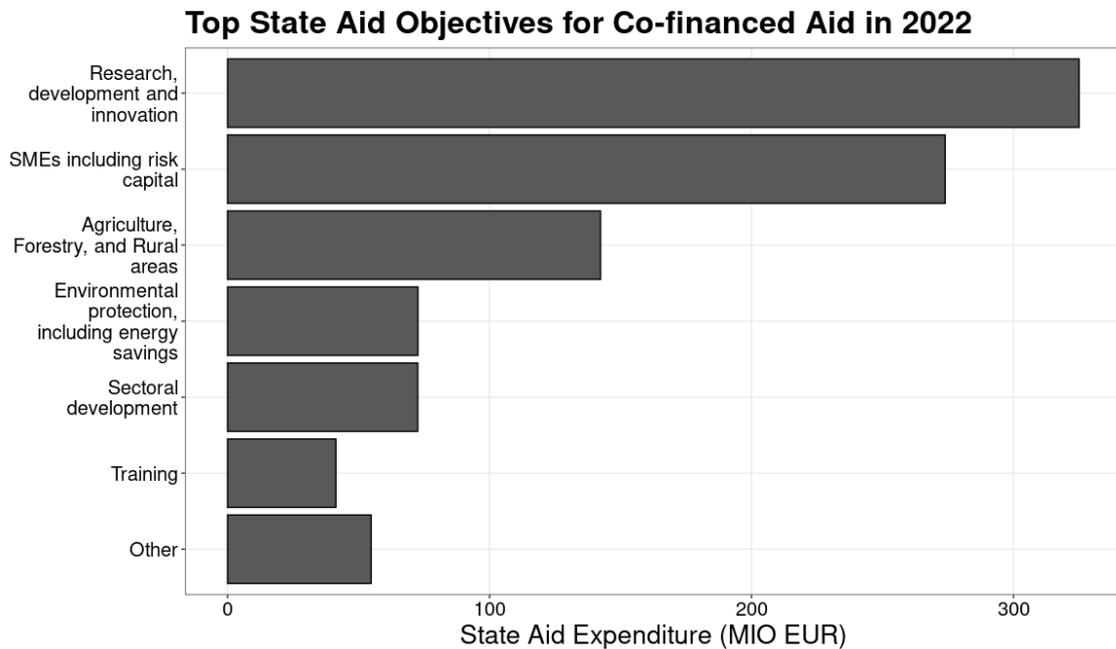


In 2022, the total State aid spending for Germany amounted to EUR 73.7 billion. The 5 biggest State aid measures absorbed 60.6% of the total spending i.e., EUR 44.6 billion.

Finally, the amount of aid co-financed with EU funds in Germany corresponded to EUR 982.8 million (around 1.3% of the total spending) and was mostly concentrated in Research, development and innovation (33.1%), SMEs including risk capital (27.9%) and Agriculture, Forestry, and Rural areas (14.5%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



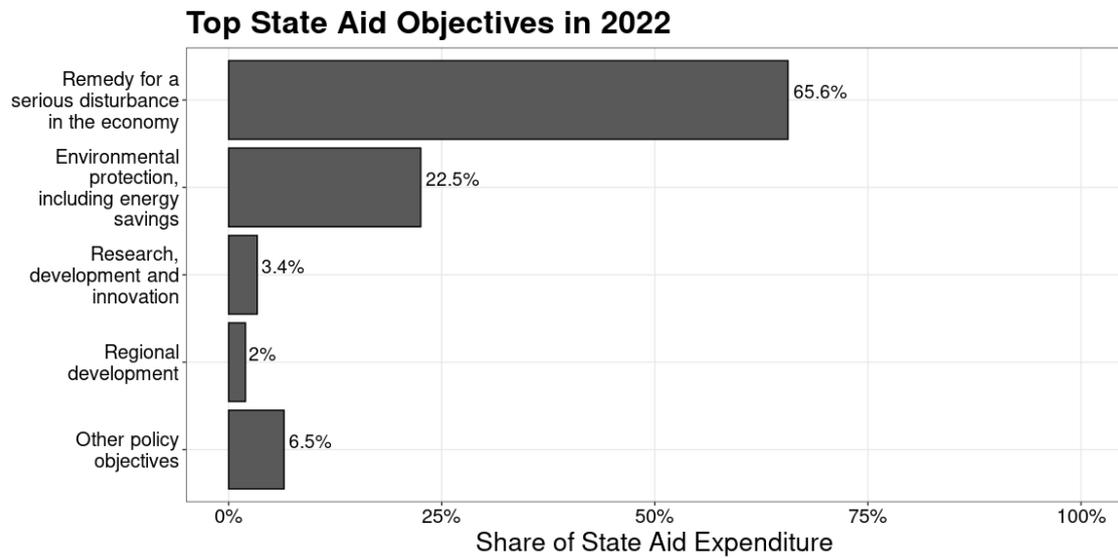
6.3 State Aid Spending – Top Objectives and Instruments

Around 88.1% of State aid spending in Germany was concentrated in two main policy objectives. Around 65.6% was directed towards “Remedy for a serious disturbance in the economy” while 22.5% to “Environmental protection, including energy savings”.

Furthermore, Germany devoted around 3.4% towards “Research, development and innovation” and 2% to “Regional development”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 67.5% of the total GBER spending, as illustrated in Table 3.1.

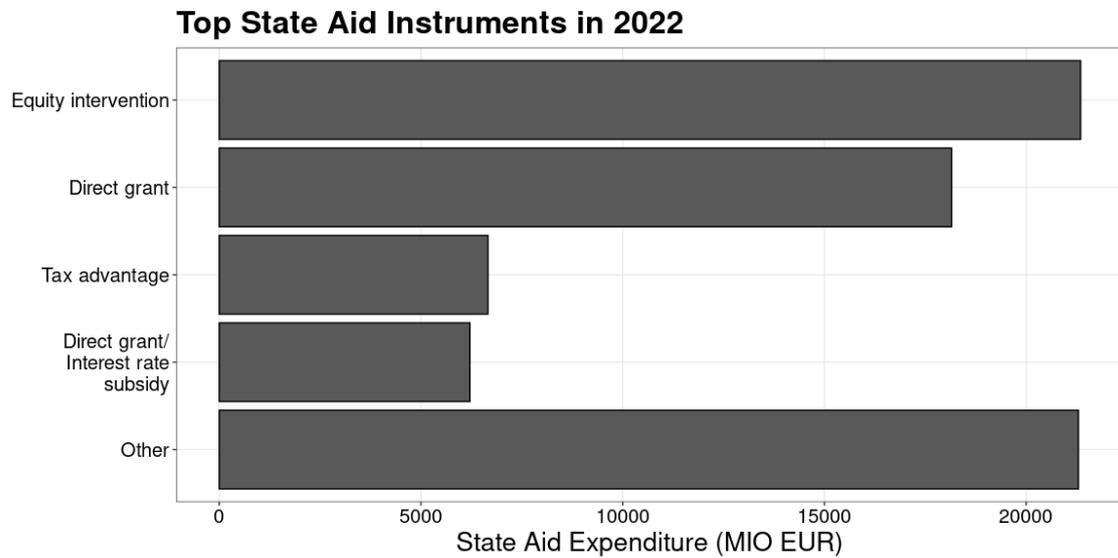
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	43.1%
Industrial research (Art. 25(2)(b))	11.8%
Investment aid for energy efficient district heating and cooling (Art. 46)	6.3%
Experimental development (Art. 25(2)(c))	6.3%
Total top 4 GBER articles	67.5%

In terms of State aid instruments, Germany privileged the use of "Equity intervention" (around EUR 21.3 billion, 29% of total State aid spending), followed by "Other" (EUR 18.3 billion, 24.9% of total State aid spending), and "Direct grant" (around EUR 18.2 billion, 24.6% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

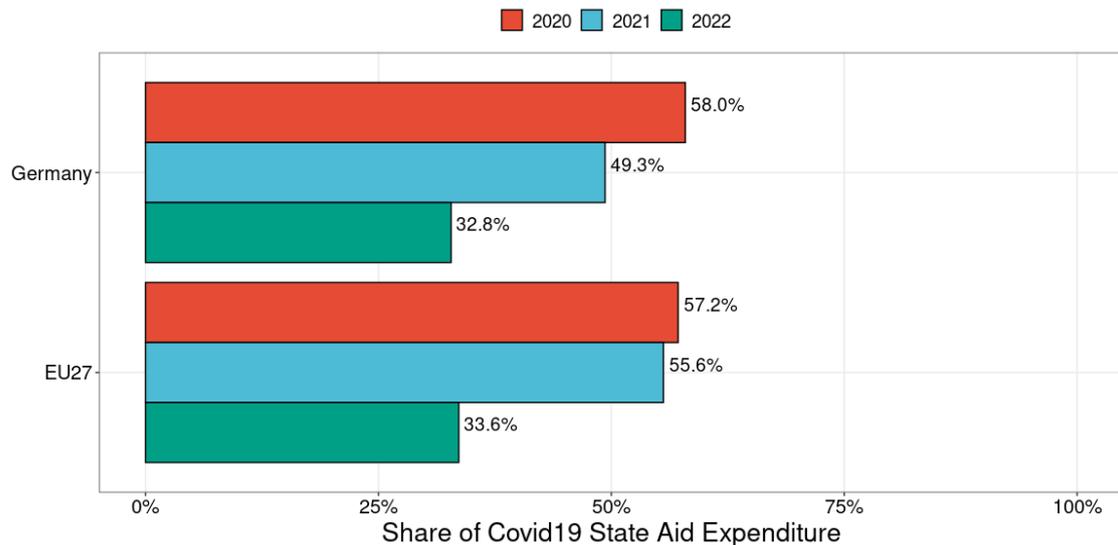
Figure 3.2: State aid expenditure for the main instruments.



6.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Germany amounted to EUR 24.2 billion i.e., 32.8% of the total State aid expenditure. In 2020 this amounted to EUR 73.1 billion, i.e., 58.0% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

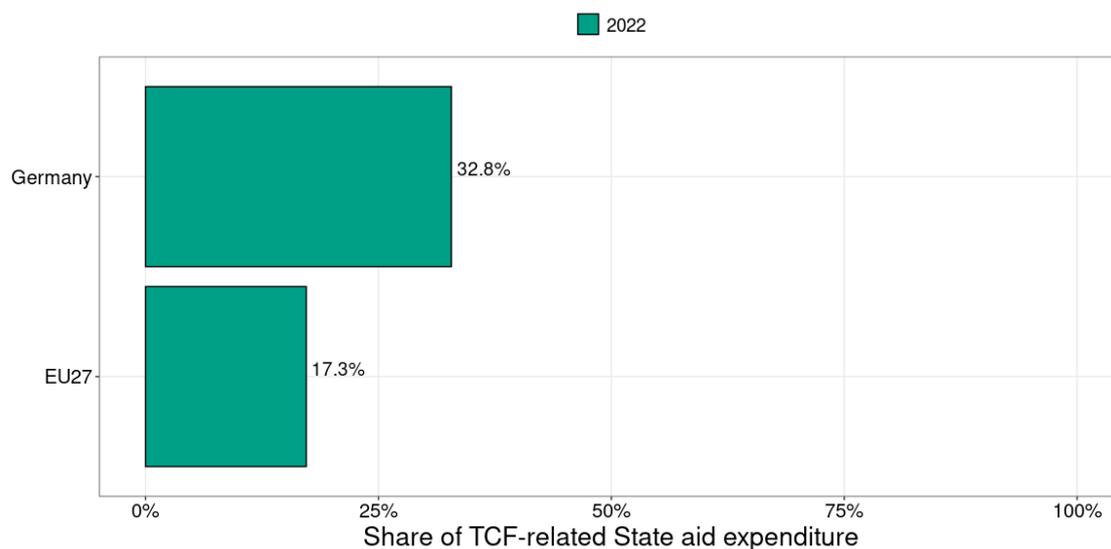


6.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Germany amounted to EUR 24.2 billion i.e., 32.8% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



7 Country Focus on Denmark in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

7.1 Case and Procedural Information

The total number of active measures corresponded to 176 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	17	9.7%
Fisheries Block Exemption Regulation	2	1.1%
General Block Exemption Regulation	99	56.2%
Notified Aid	58	33.0%

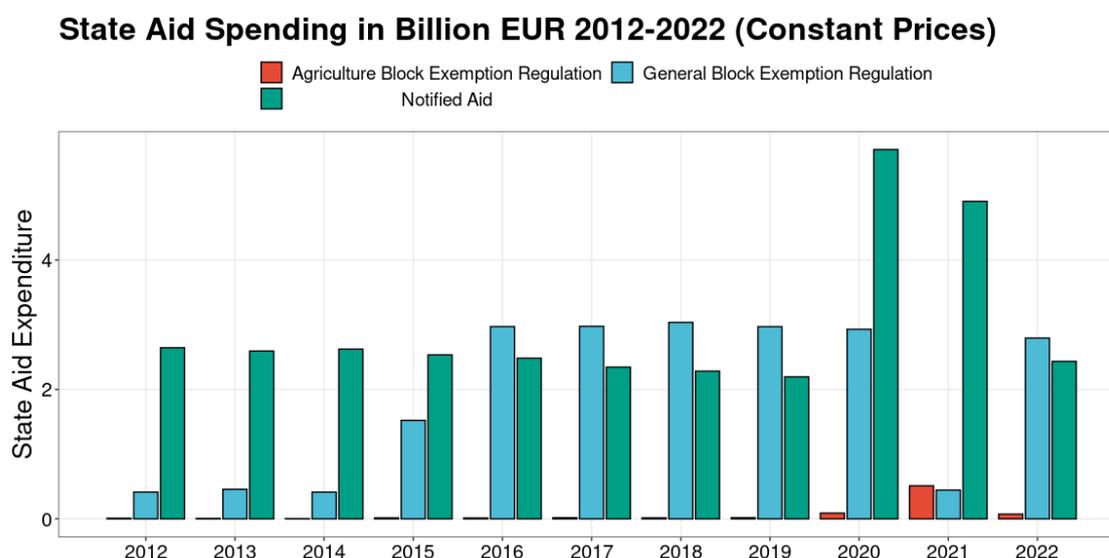
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Total	176	100.0%

In 2022, the number of GBER measures in Denmark reached 56.2% of the total number of measures, with 75.4% of all newly implemented measures falling under GBER.

7.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Denmark during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

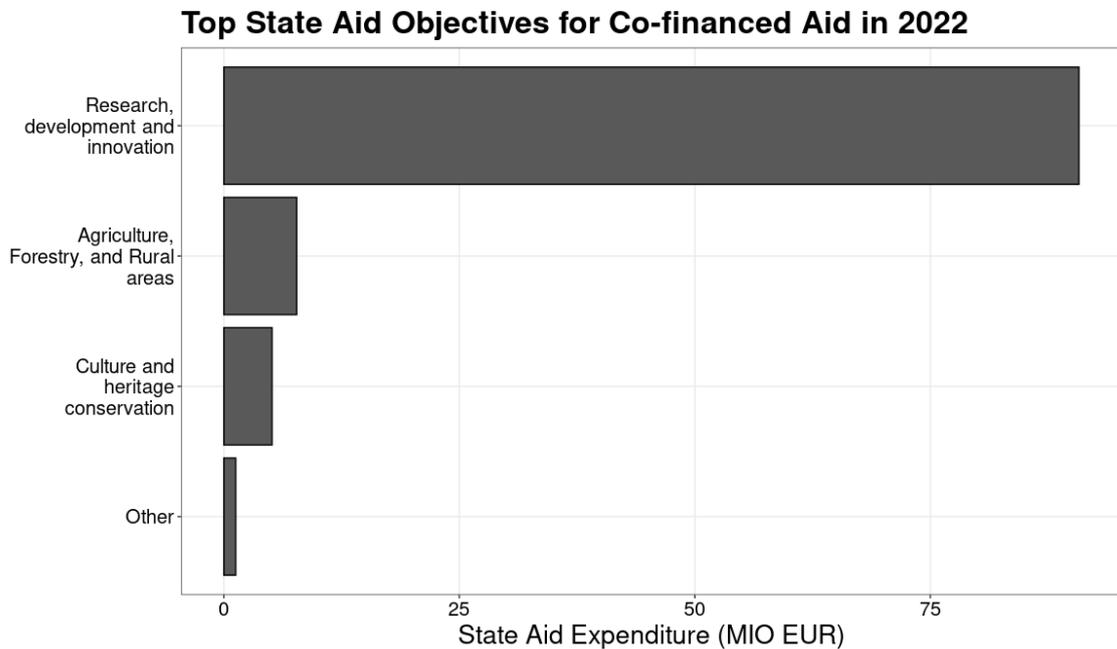


In 2022, the total State aid spending for Denmark amounted to EUR 5.3 billion. The 5 biggest State aid measures absorbed 68.7% of the total spending i.e., EUR 3.6 billion.

Finally, the amount of aid co-financed with EU funds in Denmark corresponded to EUR 104.9 million (around 2% of the total spending) and was mostly concentrated in Research, development and innovation (86.5%), Agriculture, Forestry, and Rural areas (7.4%) and Culture and heritage conservation (4.9%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



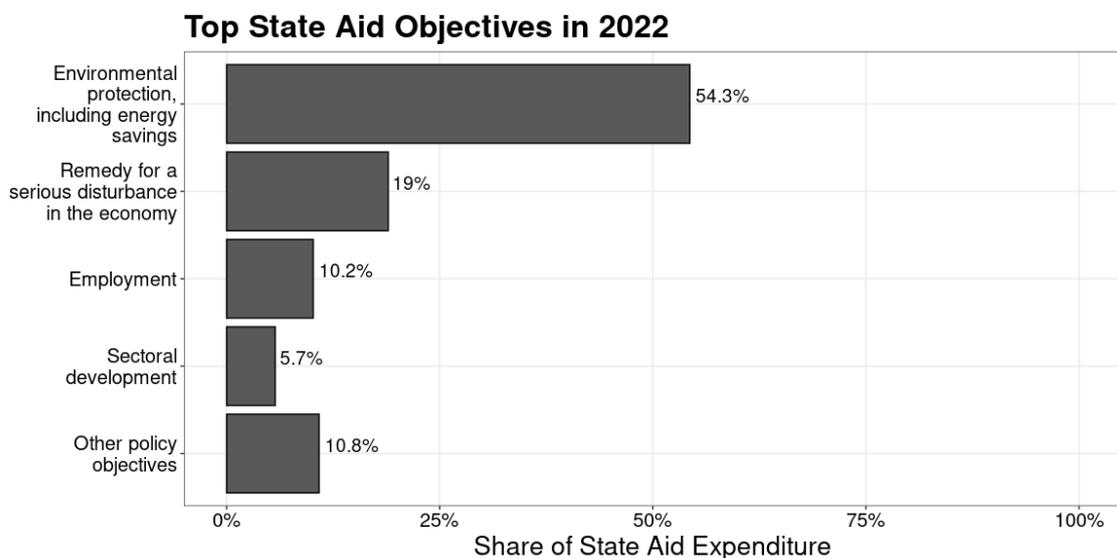
7.3 State Aid Spending - Top Objectives and Instruments

Around 73.3% of State aid spending in Denmark was concentrated in two main policy objectives. Around 54.3% was directed towards “Environmental protection, including energy savings” while 19% to “Remedy for a serious disturbance in the economy”.

Furthermore, Denmark devoted around 10.2% towards “Employment” and 5.7% to “Sectoral development”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 94.6% of the total GBER spending, as illustrated in Table 3.1.

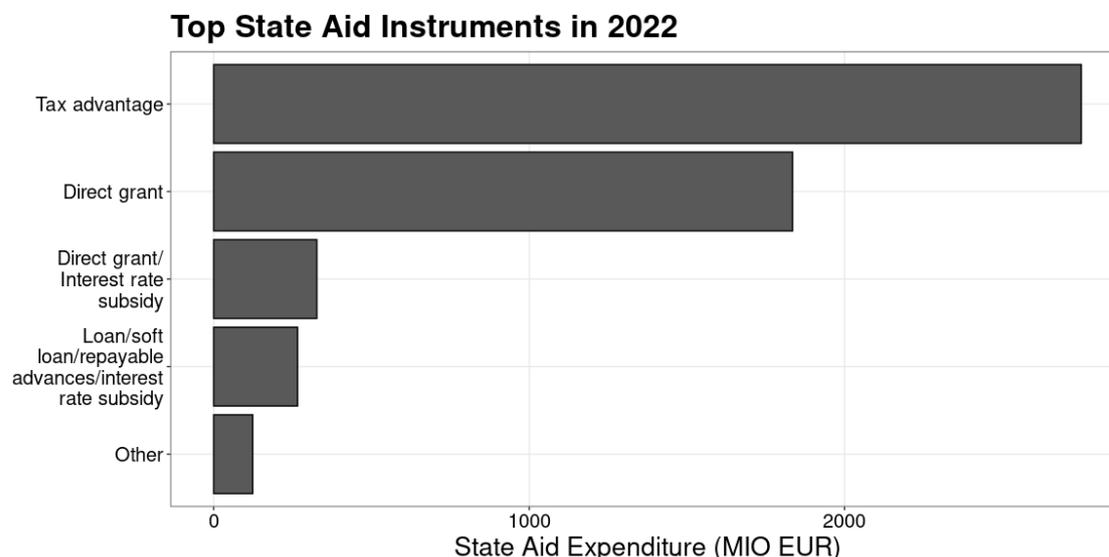
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	86.6%
Industrial research (Art. 25(2)(b))	5.0%
Experimental development (Art. 25(2)(c))	2.0%
Aid for the recruitment of disadvantaged workers in the form of wage subsidies (Art. 40)	1.0%
Total top 4 GBER articles	94.6%

In terms of State aid instruments, Denmark privileged the use of "Tax advantage" (around EUR 2.8 billion, 51.9% of total State aid spending), followed by "Direct grant" (EUR 1.8 billion, 34.6% of total State aid spending), and "Direct grant/ Interest rate subsidy" (around EUR 326.9 million, 6.2% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

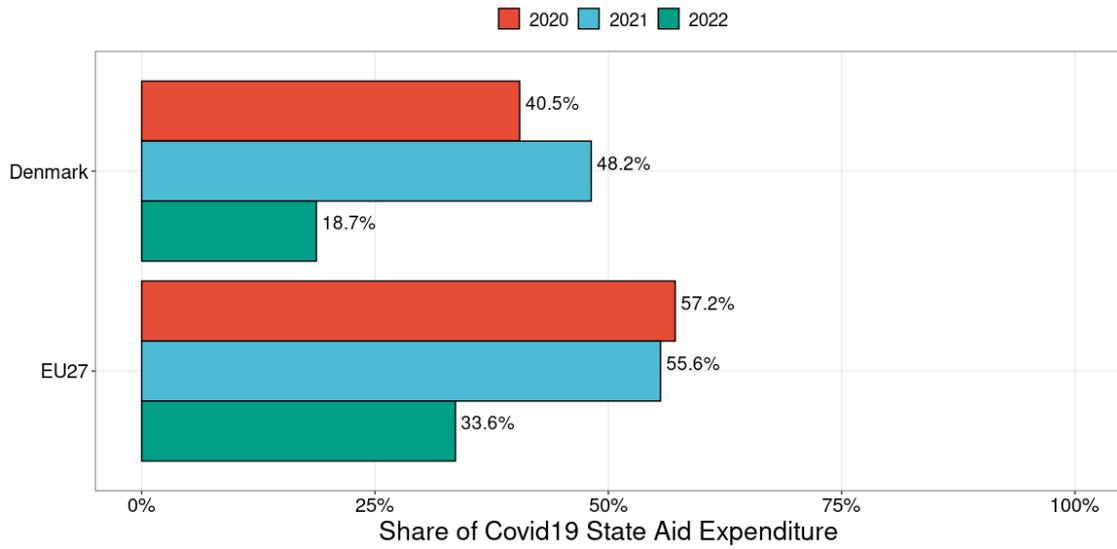
Figure 3.2: State aid expenditure for the main instruments.



7.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Denmark amounted to EUR 992.6 million i.e., 18.7% of the total State aid expenditure. In 2020 this amounted to EUR 3.1 billion, i.e., 40.5% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

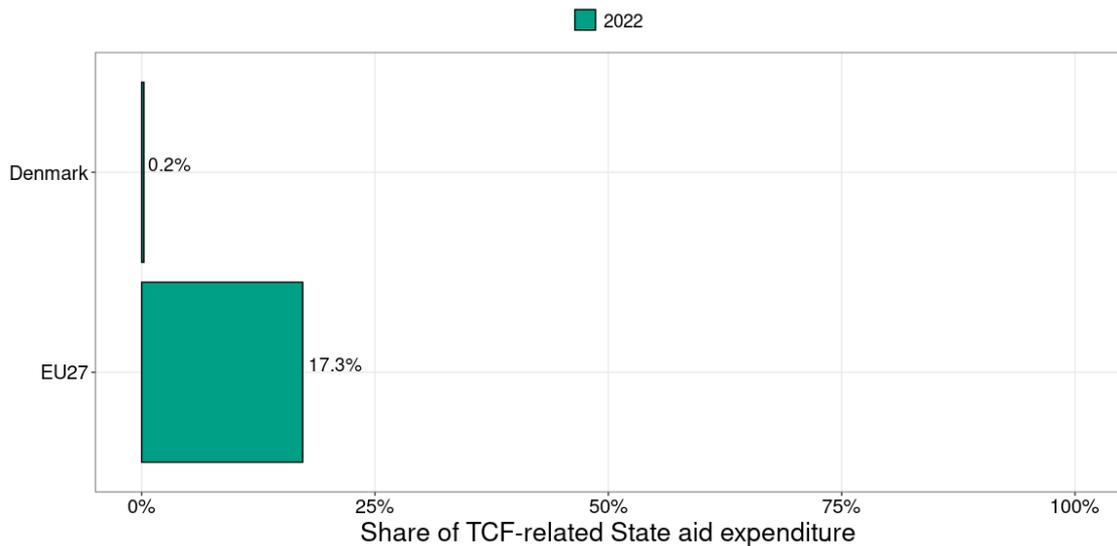


7.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Denmark amounted to EUR 12.8 million i.e., 0.2% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



8 Country Focus on Spain in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

8.1 Case and Procedural Information

The total number of active measures corresponded to 666 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	95	14.3%
Fisheries Block Exemption Regulation	5	0.7%
General Block Exemption Regulation	520	78.1%
Notified Aid	46	6.9%
Total	666	100.0%

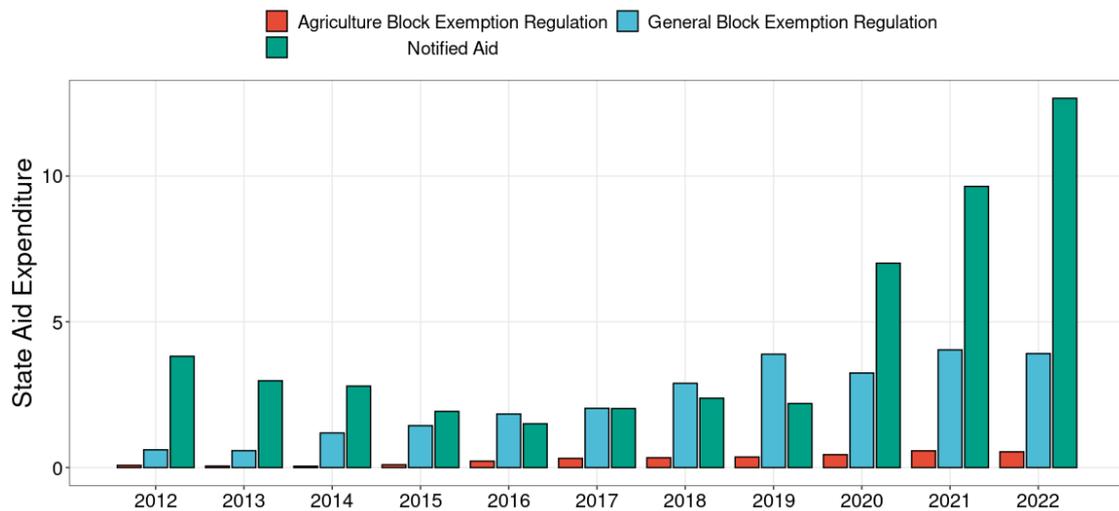
In 2022, the number of GBER measures in Spain reached 78.1% of the total number of measures, with 82% of all newly implemented measures falling under GBER.

8.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Spain during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

State Aid Spending in Billion EUR 2012-2022 (Constant Prices)

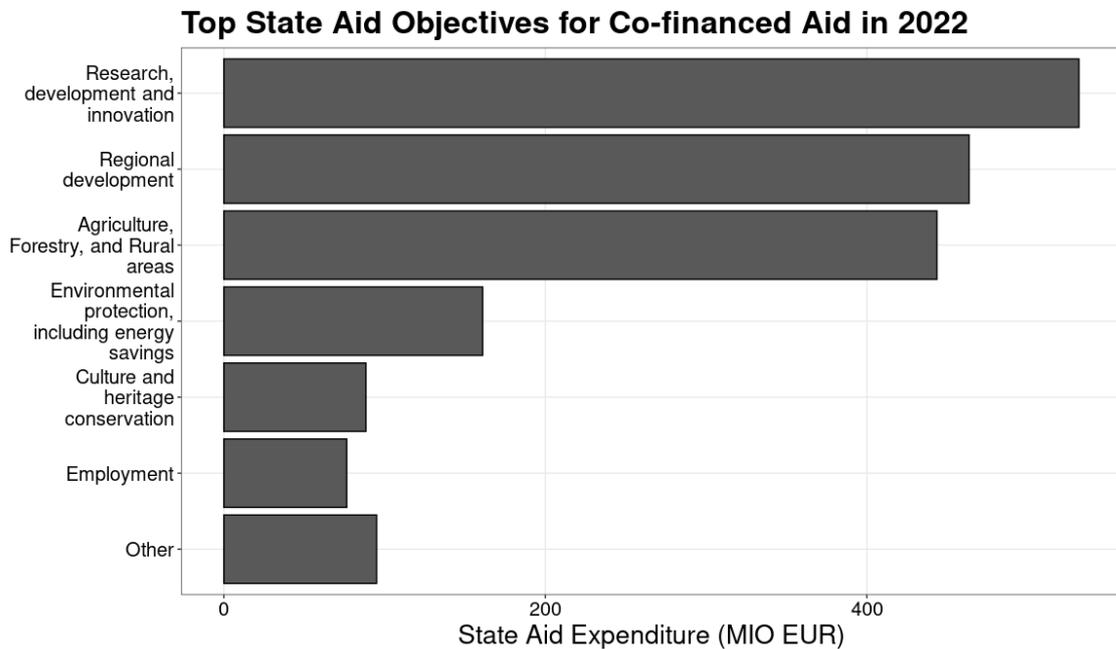


In 2022, the total State aid spending for Spain amounted to EUR 17.1 billion. The 5 biggest State aid measures absorbed 56.5% of the total spending i.e., EUR 9.7 billion.

Finally, the amount of aid co-financed with EU funds in Spain corresponded to EUR 1.9 billion (around 10.9% of the total spending) and was mostly concentrated in Research, development and innovation (28.6%), Regional development (24.9%) and Agriculture, Forestry, and Rural areas (23.8%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



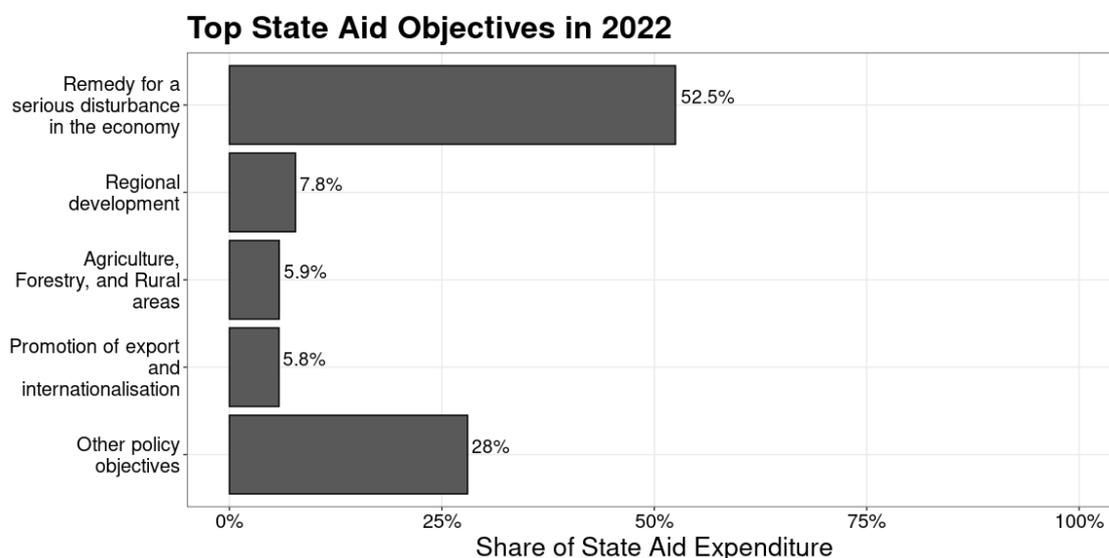
8.3 State Aid Spending - Top Objectives and Instruments

Around 60.3% of State aid spending in Spain was concentrated in two main policy objectives. Around 52.5% was directed towards “Remedy for a serious disturbance in the economy” while 7.8% to “Regional development”.

Furthermore, Spain devoted around 5.9% towards “Agriculture, Forestry, and Rural areas” and 5.8% to “Promotion of export and internationalisation”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 61% of the total GBER spending, as illustrated in Table 3.1.

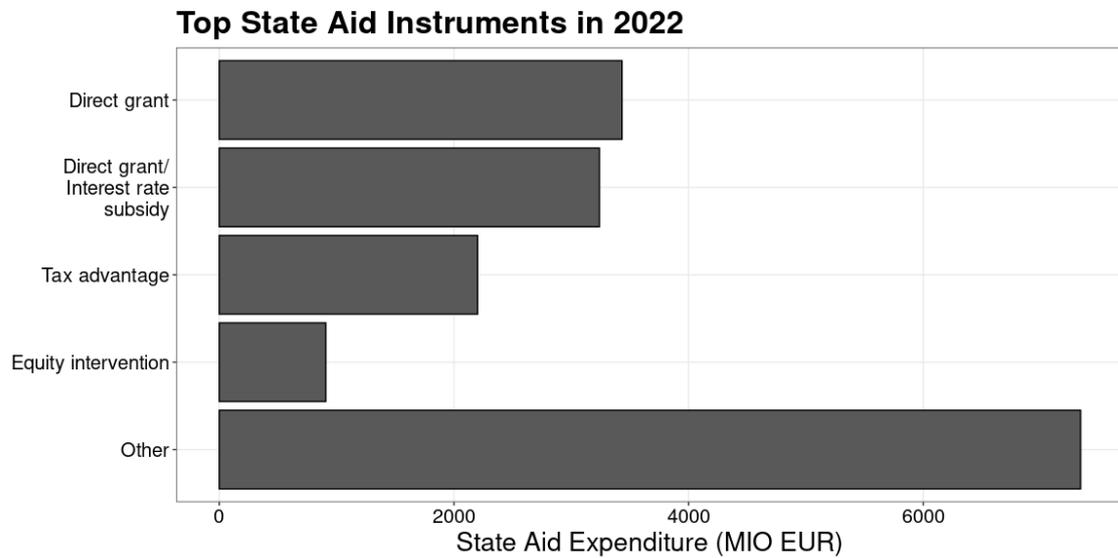
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Social aid for transport for residents of remote regions (Art. 51)	23.8%
Regional aid – investment aid (Art. 14) – Scheme	18.1%
In outermost regions (Art. 15(4))	12.2%
Experimental development (Art. 25(2)©)	6.9%
Total top 4 GBER articles	61.0%

In terms of State aid instruments, Spain privileged the use of “Other” (around EUR 6.5 billion, 38.1% of total State aid spending), followed by “Direct grant” (EUR 3.4 billion, 20% of total State aid spending), and “Direct grant/ Interest rate subsidy” (around EUR 3.2 billion, 18.9% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

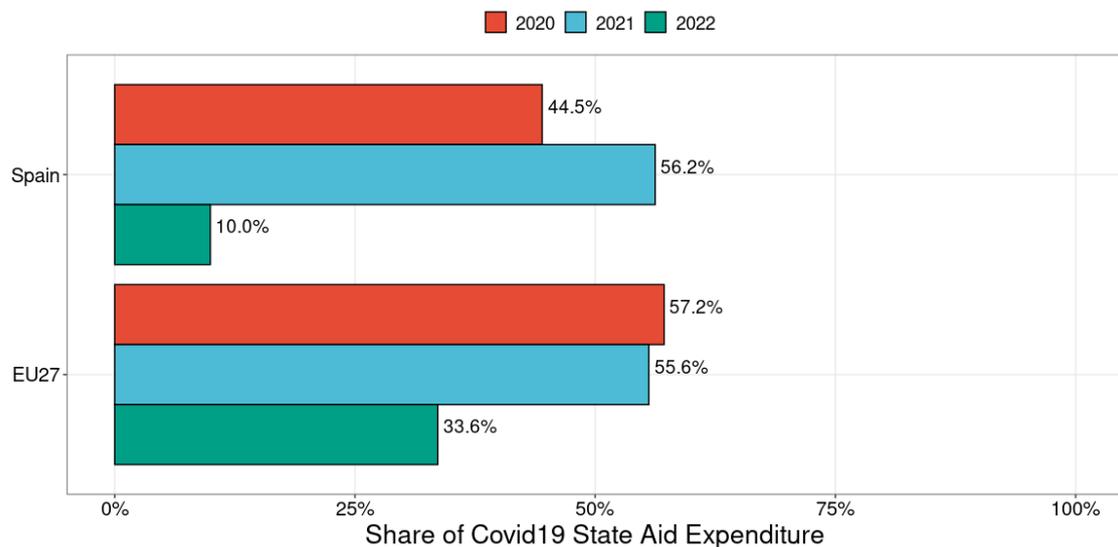
Figure 3.2: State aid expenditure for the main instruments.



8.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Spain amounted to EUR 1.7 billion i.e., 10.0% of the total State aid expenditure. In 2020 this amounted to EUR 4.4 billion, i.e., 44.5% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

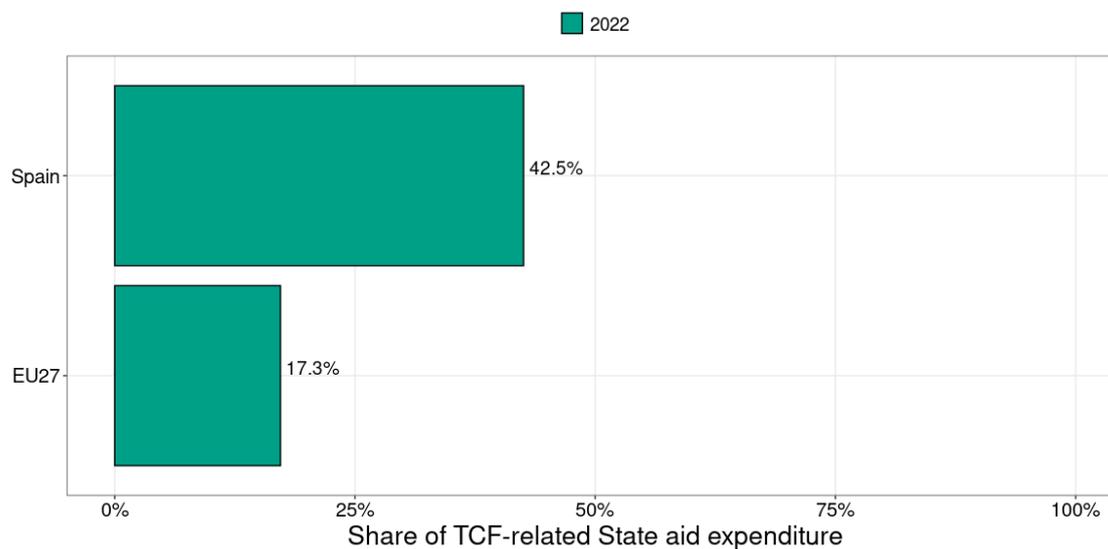


8.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Spain amounted to EUR 7.3 billion i.e., 42.5% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



9 Country Focus on Estonia in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

9.1 Case and Procedural Information

The total number of active measures corresponded to 131 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

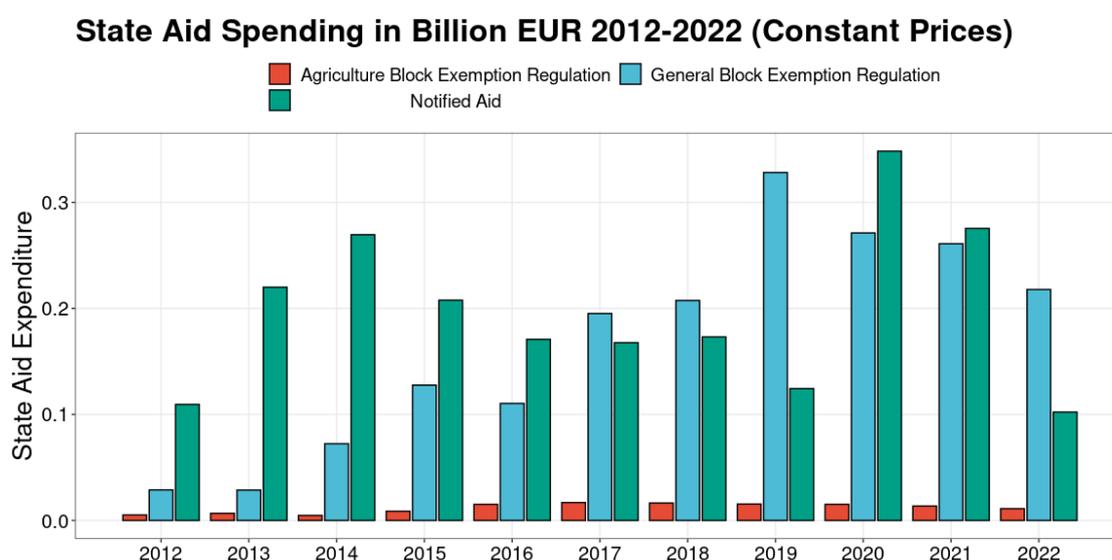
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	12	9.1%
Fisheries Block Exemption Regulation	1	0.8%
General Block Exemption Regulation	102	77.9%
Notified Aid	16	12.2%
Total	131	100.0%

In 2022, the number of GBER measures in Estonia reached 77.9% of the total number of measures, with 73% of all newly implemented measures falling under GBER.

9.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Estonia during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

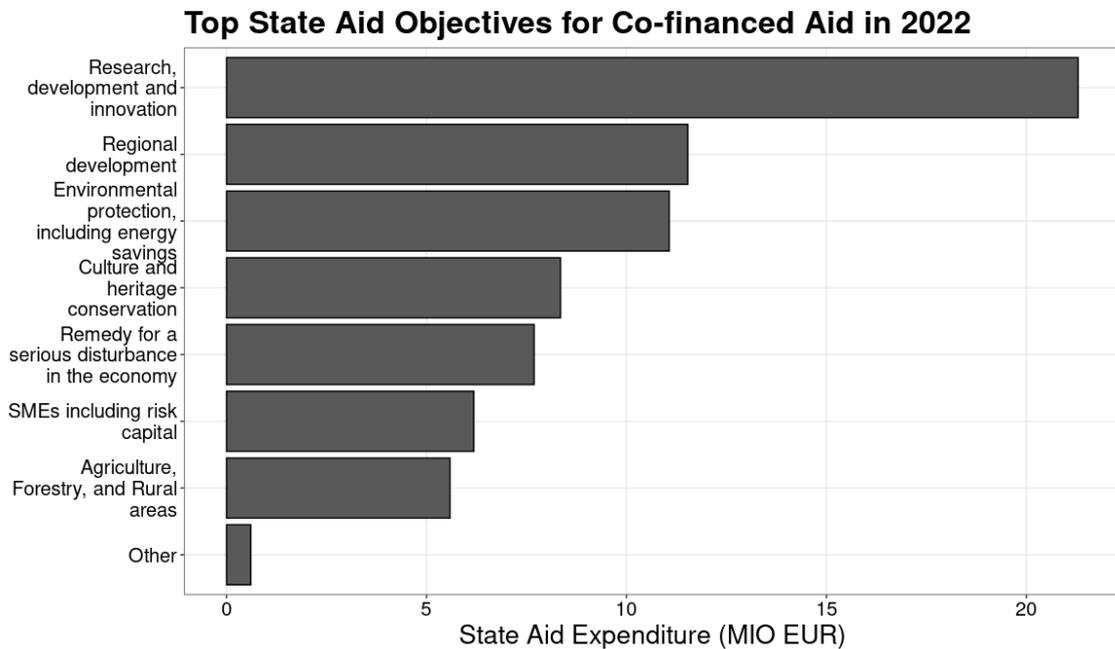


In 2022, the total State aid spending for Estonia amounted to EUR 0.3 million. The 5 biggest State aid measures in absorbed 54.7% of the total spending i.e., EUR 181.2million.

Finally, the amount of aid co-financed with EU funds in Estonia corresponded to EUR 72.3 million (around 21.8% of the total spending) and was mostly concentrated in Research, development and innovation (29.5%), Regional development (16%) and Environmental protection, including energy savings (15.3%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



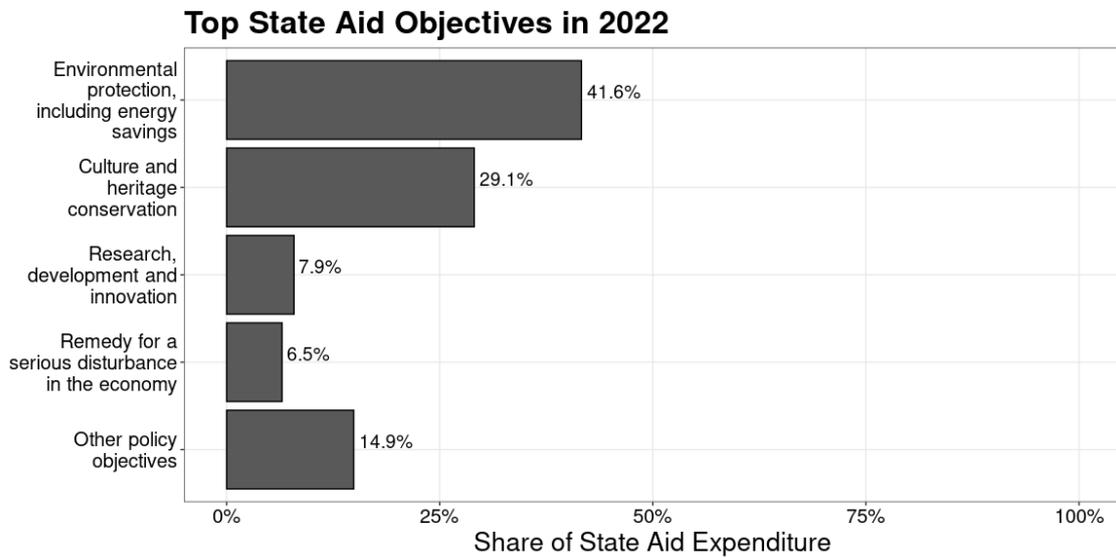
9.3 State Aid Spending - Top Objectives and Instruments

Around 70.7% of State aid spending in Estonia was concentrated in two main policy objectives. Around 41.6% was directed towards “Environmental protection, including energy savings” while 29.1% to “Culture and heritage conservation”.

Furthermore, Estonia devoted around 7.9% towards “Research, development and innovation” and 6.5% to “Remedy for a serious disturbance in the economy”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 66.3% of the total GBER spending, as illustrated in Table 3.1.

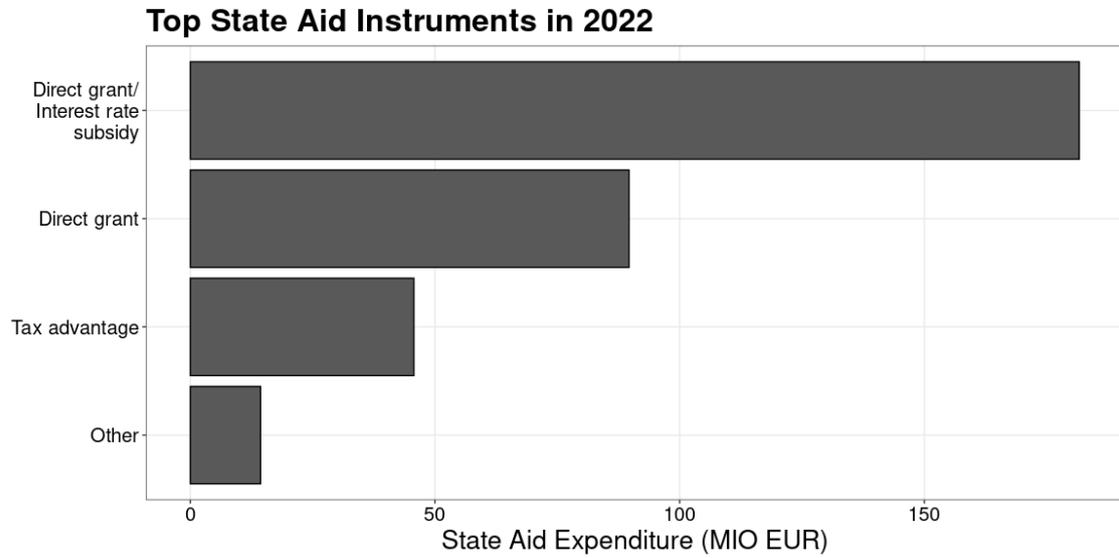
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid for culture and heritage conservation (Art. 53)	34.4%
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	15.8%
Operating aid for the promotion of energy from renewable sources in small scale installation (Art. 43)	9.5%
Regional aid - investment aid (Art. 14) - Scheme	6.6%
Total top 4 GBER articles	66.3%

In terms of State aid instruments, Estonia privileged the use of "Direct grant/ Interest rate subsidy" (around EUR 181.7 million, 54.8% of total State aid spending), followed by "Direct grant" (EUR 89.7 million, 27.1% of total State aid spending), and "Tax advantage" (around EUR 45.7 million, 13.8% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

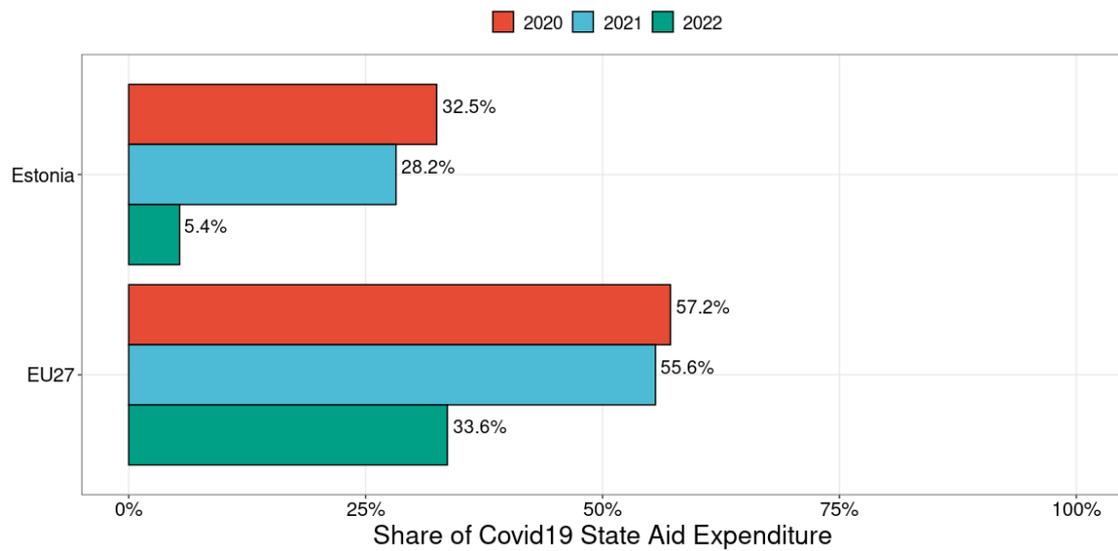
Figure 3.2: State aid expenditure for the main instruments.



9.4 State Aid Spending – Covid19

In 2022 the Covid19-related expenditure for Estonia amounted to EUR 17.8 million i.e., 5.4% of the total State aid expenditure. In 2020 this amounted to EUR 150.8 million, i.e., 32.5% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

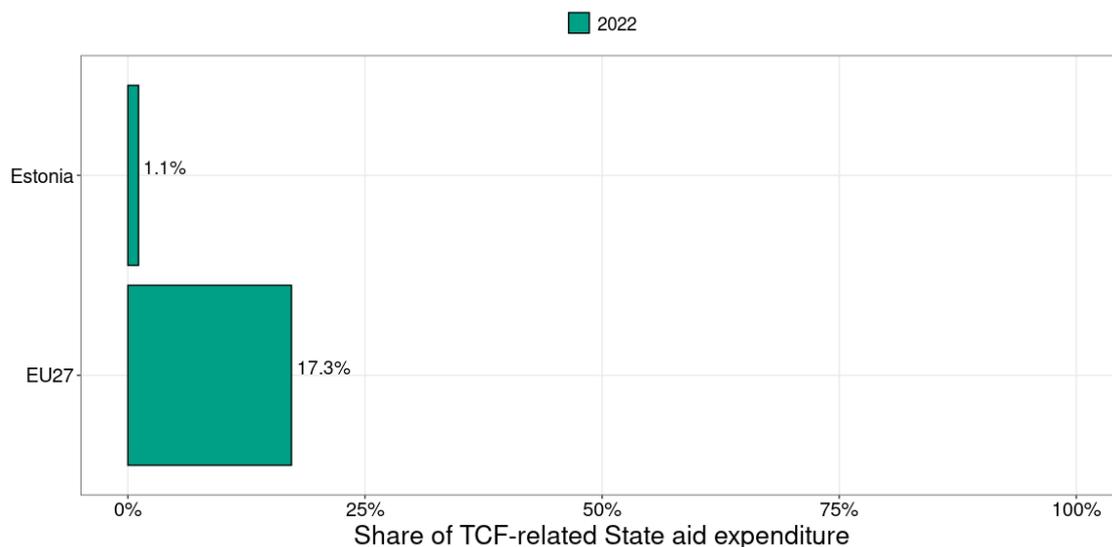


9.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Estonia amounted to EUR 3.7 million i.e., 1.1% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



10 Country Focus on Finland in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

10.1 Case and Procedural Information

The total number of active measures corresponded to 120 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

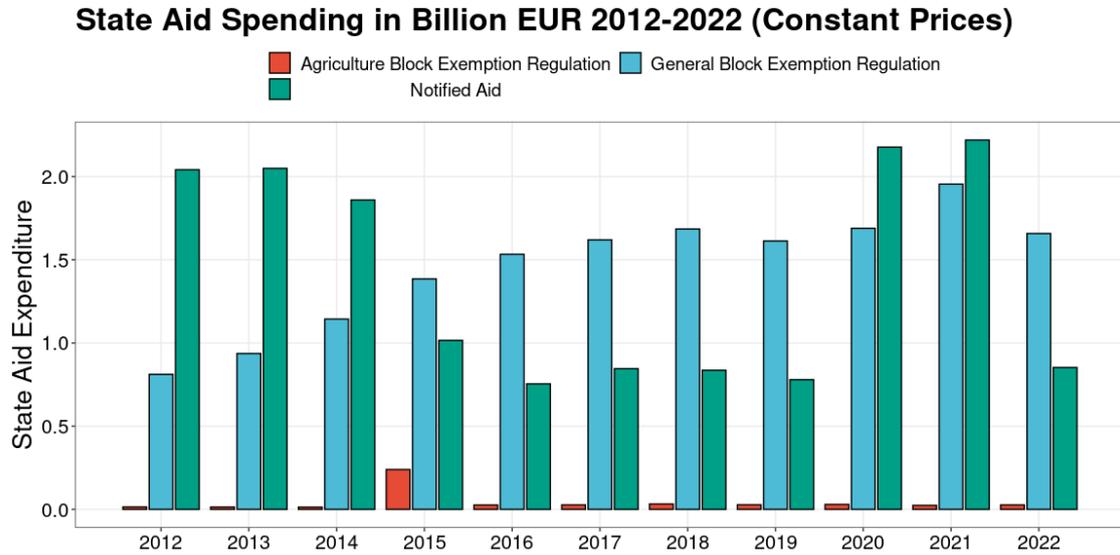
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	14	11.7%
Fisheries Block Exemption Regulation	1	0.8%
General Block Exemption Regulation	64	53.3%
Notified Aid	41	34.2%
Total	120	100.0%

In 2022, the number of GBER measures in Finland reached 53.3% of the total number of measures, with 55% of all newly implemented measures falling under GBER.

10.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Finland during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

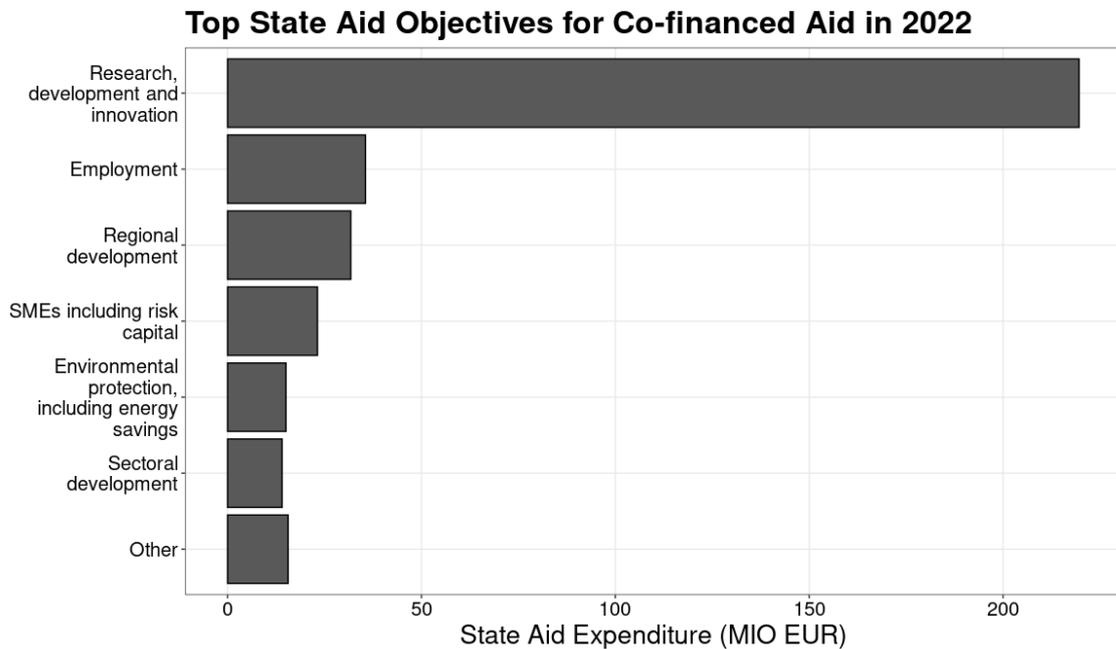


In 2022, the total State aid spending for Finland amounted to EUR 2.5 billion. The 5 biggest State aid measures absorbed 53.1% of the total spending i.e., EUR 1.3 billion.

Finally, the amount of aid co-financed with EU funds in Finland corresponded to EUR 354.9 million (around 14% of the total spending) and was mostly concentrated in Research, development and innovation (61.9%), Employment (10%) and Regional development (9%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



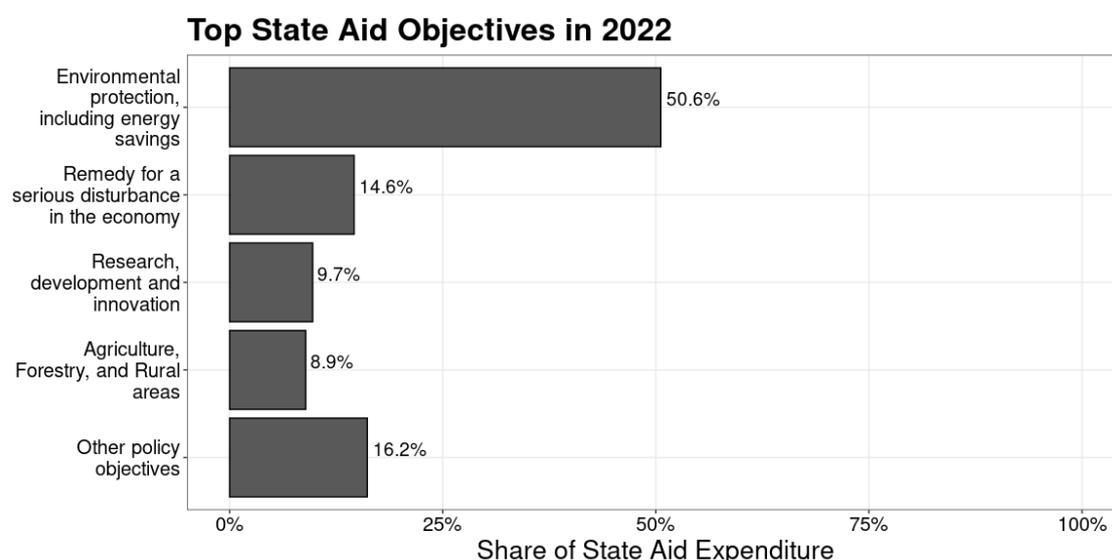
10.3 State Aid Spending - Top Objectives and Instruments

Around 65.2% of State aid spending in Finland was concentrated in two main policy objectives. Around 50.6% was directed towards “Environmental protection, including energy savings” while 14.6% to “Remedy for a serious disturbance in the economy”.

Furthermore, Finland devoted around 9.7% towards “Research, development and innovation” and 8.9% to “Agriculture, Forestry, and Rural areas”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 77% of the total GBER spending, as illustrated in Table 3.1.

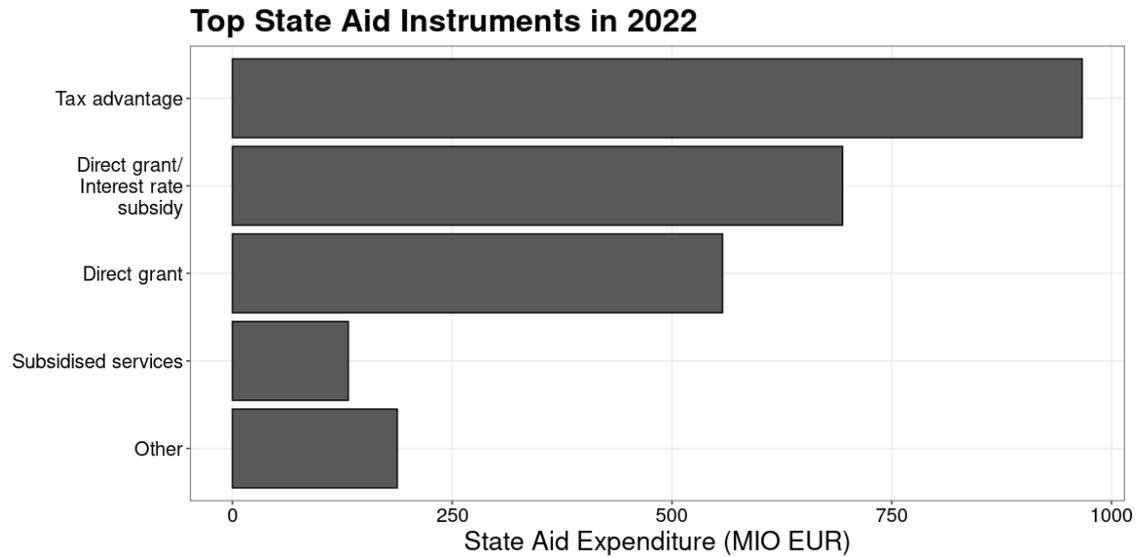
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	57.1%
Industrial research (Art. 25(2)(b))	12.1%
Investment aid for waste recycling and re-utilisation (Art. 47)	4.7%
Investment aid enabling undertakings to go beyond Union standards for environmental protection or increase the level of environmental protection in the absence of Union standards (Art.36)	3.1%
Total top 4 GBER articles	77.0%

In terms of State aid instruments, Finland privileged the use of "Tax advantage" (around EUR 966.7 million, 38.1% of total State aid spending), followed by "Direct grant/ Interest rate subsidy" (EUR 694.1 million, 27.4% of total State aid spending), and "Direct grant" (around EUR 557.6 million, 22% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

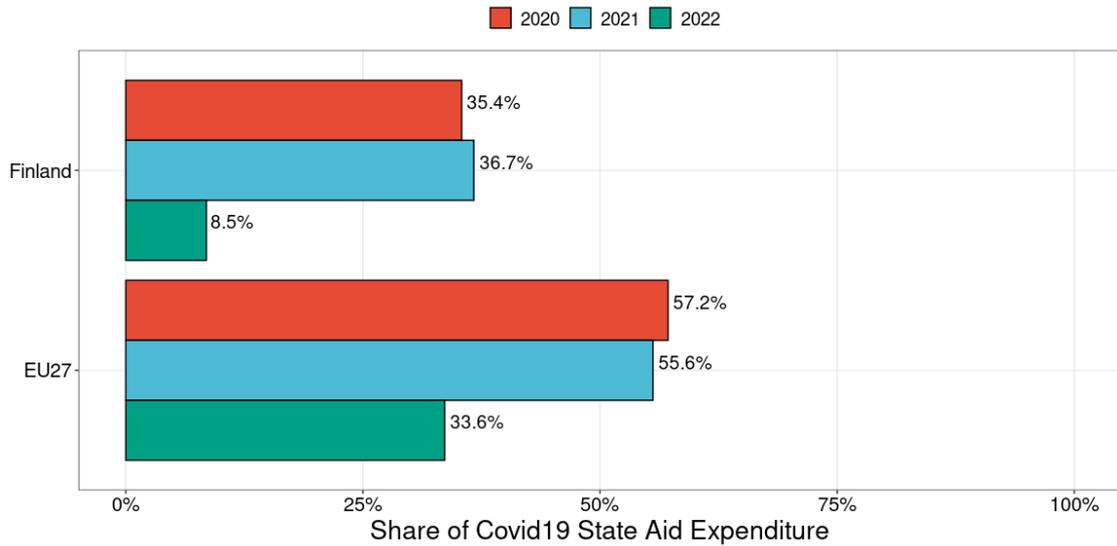
Figure 3.2: State aid expenditure for the main instruments.



10.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Finland amounted to EUR 215.6 million i.e., 8.5% of the total State aid expenditure. In 2020 this amounted to EUR 1.3 billion, i.e., 35.4% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

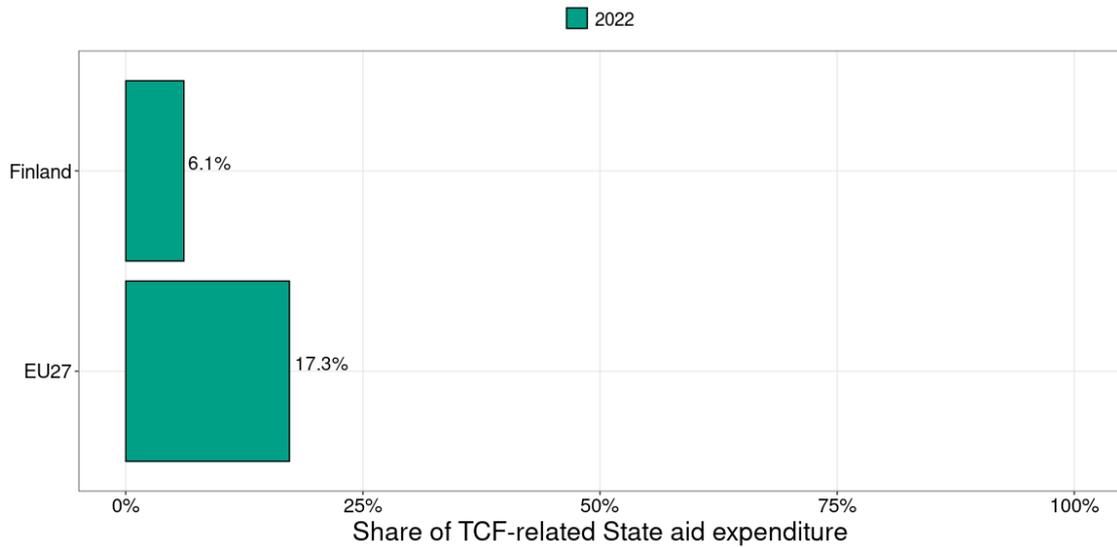


10.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Finland amounted to EUR 155.4 million i.e., 6.1% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



11 Country Focus on France in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

11.1 Case and Procedural Information

The total number of active measures corresponded to 294 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	21	7.1%
Fisheries Block Exemption Regulation	9	3.1%
General Block Exemption Regulation	132	44.9%
Notified Aid	132	44.9%
Total	294	100.0%

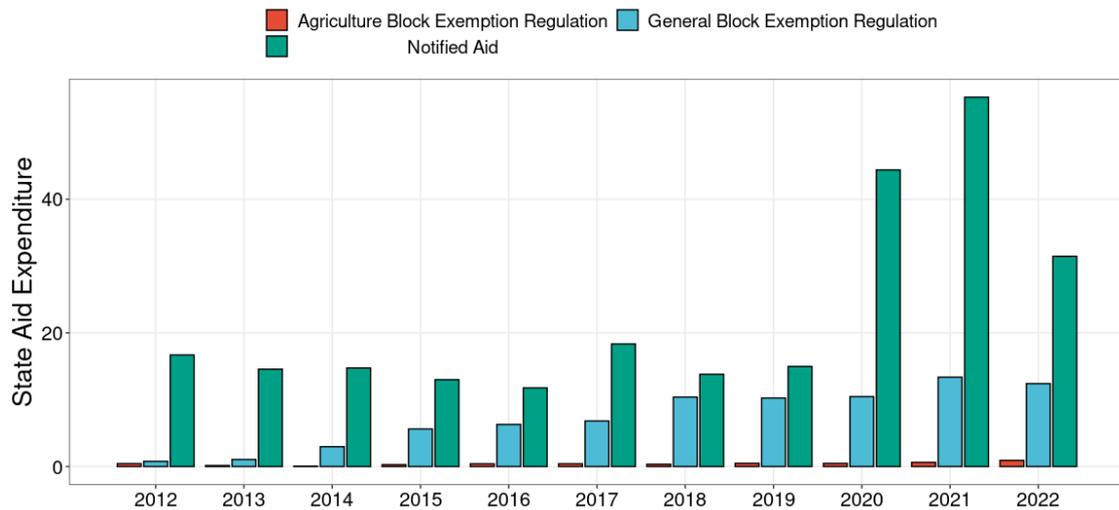
In 2022, the number of GBER measures in France reached 44.9% of the total number of measures, with 54.3% of all newly implemented measures falling under GBER.

11.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for France during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

State Aid Spending in Billion EUR 2012-2022 (Constant Prices)

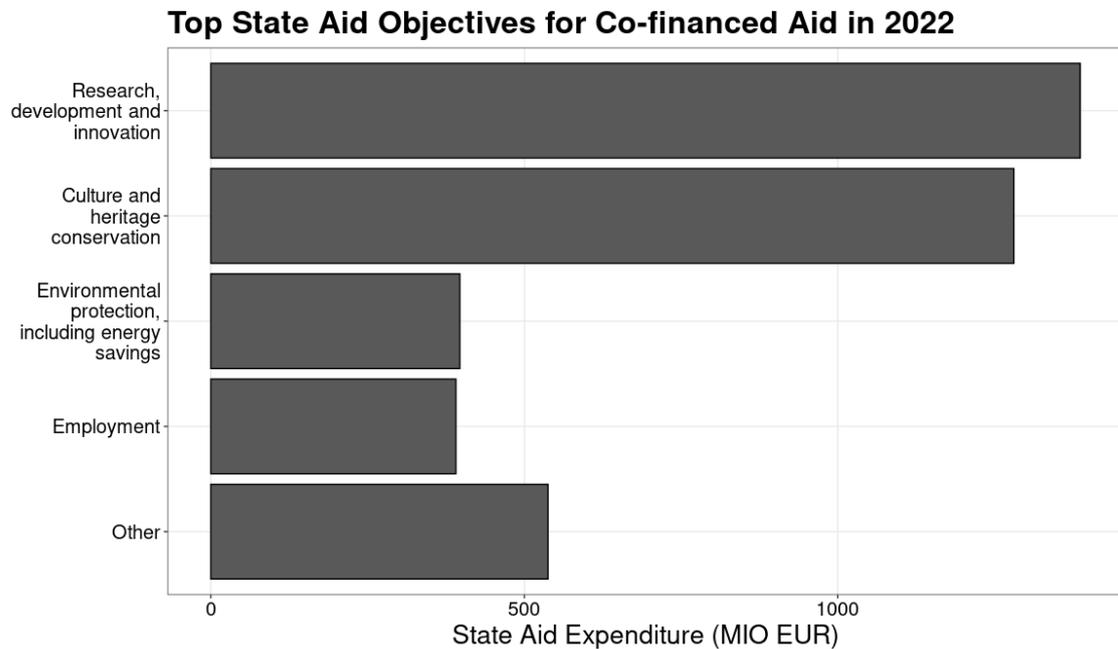


In 2022, the total State aid spending for France amounted to EUR 44.8 billion. The 5 biggest State aid measures absorbed 50.7% of the total spending i.e., EUR 22.7 billion.

Finally, the amount of aid co-financed with EU funds in France corresponded to EUR 4 billion (around 8.9% of the total spending) and was mostly concentrated in Research, development and innovation (34.7%), Culture and heritage conservation (32.1%) and Environmental protection, including energy savings (10%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



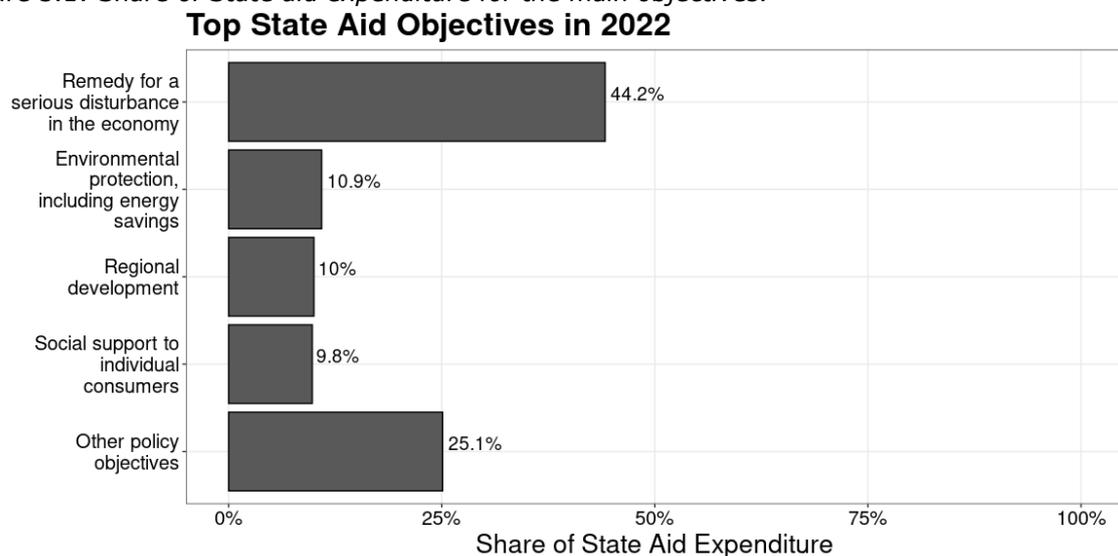
11.3 State Aid Spending - Top Objectives and Instruments

Around 55.1% of State aid spending in France was concentrated in two main policy objectives. Around 44.2% was directed towards “Remedy for a serious disturbance in the economy” while 10.9% to “Environmental protection, including energy savings”.

Furthermore, France devoted around 10% towards “Regional development” and 9.8% to “Social support to individual consumers”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 68.8% of the total GBER spending, as illustrated in Table 3.1.

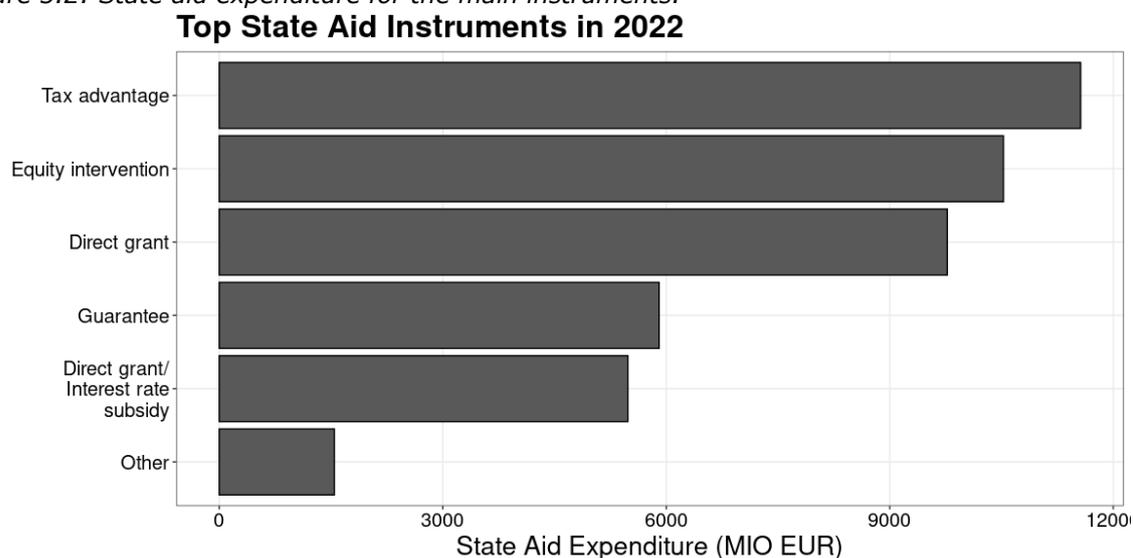
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	27.5%
In outermost regions (Art. 15(4))	16.7%
Industrial research (Art. 25(2)(b))	14.8%
Aid for culture and heritage conservation (Art. 53)	9.8%
Total top 4 GBER articles	68.8%

In terms of State aid instruments, France privileged the use of "Tax advantage" (around EUR 11.6 billion, 25.8% of total State aid spending), followed by "Equity intervention" (EUR 10.5 billion, 23.5% of total State aid spending), and "Direct grant" (around EUR 9.8 billion, 21.8% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

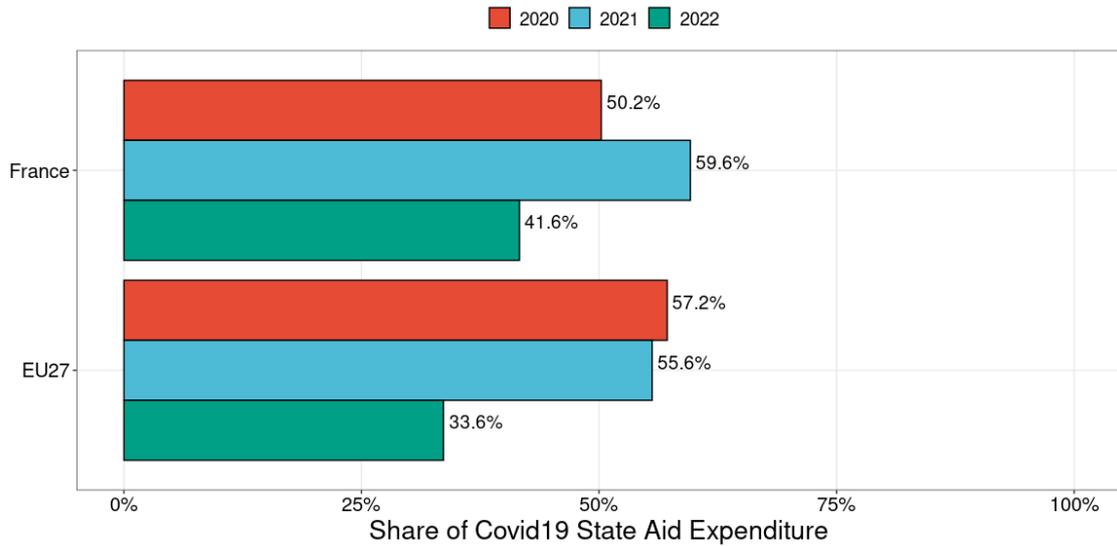
Figure 3.2: State aid expenditure for the main instruments.



11.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for France amounted to EUR 18.6 billion i.e., 41.6% of the total State aid expenditure. In 2020 this amounted to EUR 26.5 billion, i.e., 50.2% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

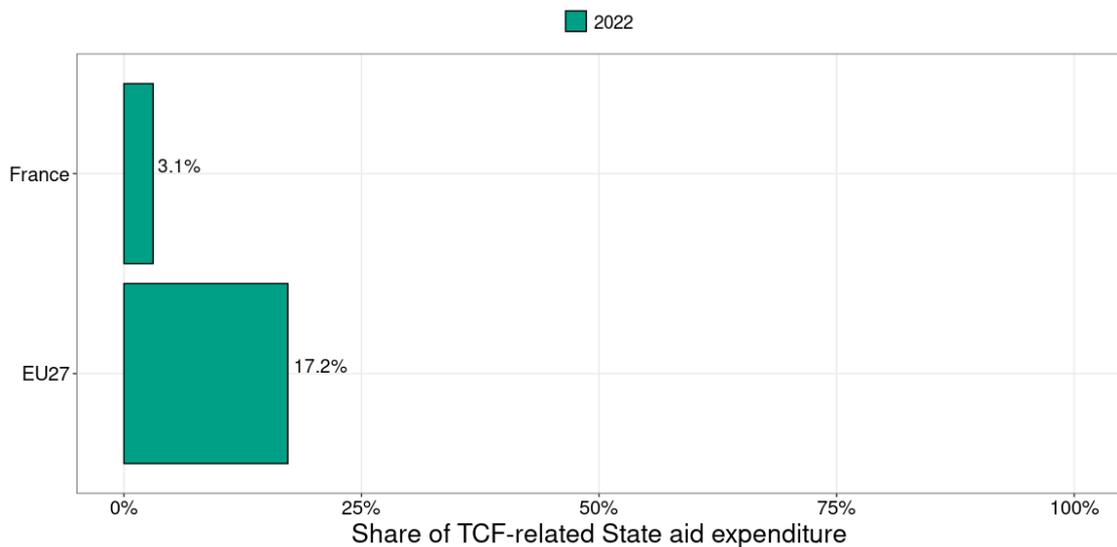


11.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for France amounted to EUR 1.4 billion i.e., 3.1% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



12 Country Focus on Greece in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

12.1 Case and Procedural Information

The total number of active measures corresponded to 279 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

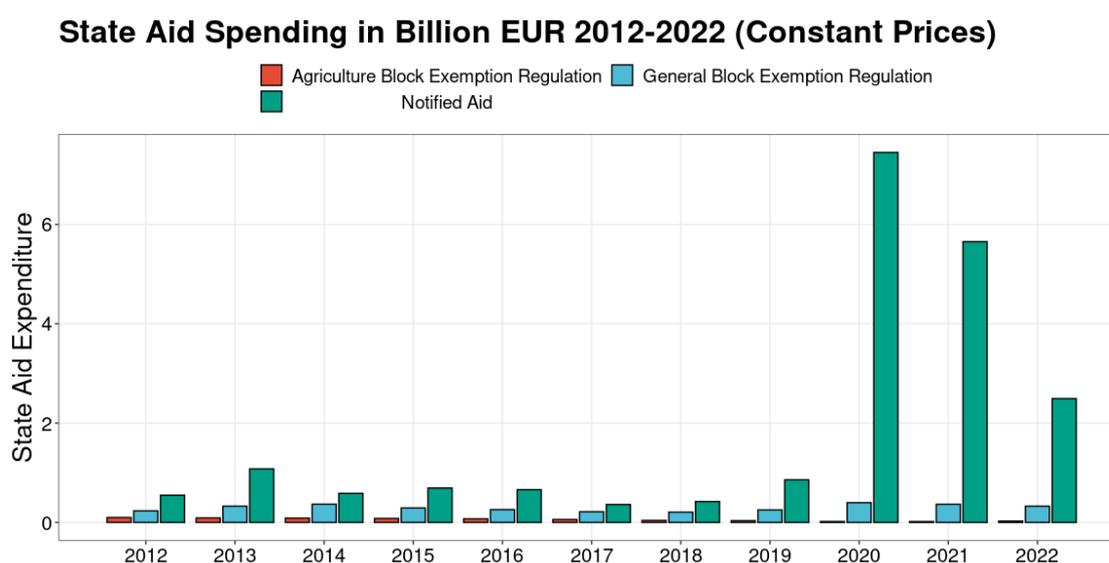
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	40	14.3%
Fisheries Block Exemption Regulation	6	2.2%
General Block Exemption Regulation	195	69.9%
Notified Aid	38	13.6%
Total	279	100.0%

In 2022, the number of GBER measures in Greece reached 69.9% of the total number of measures, with 67.1% of all newly implemented measures falling under GBER.

12.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Greece during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

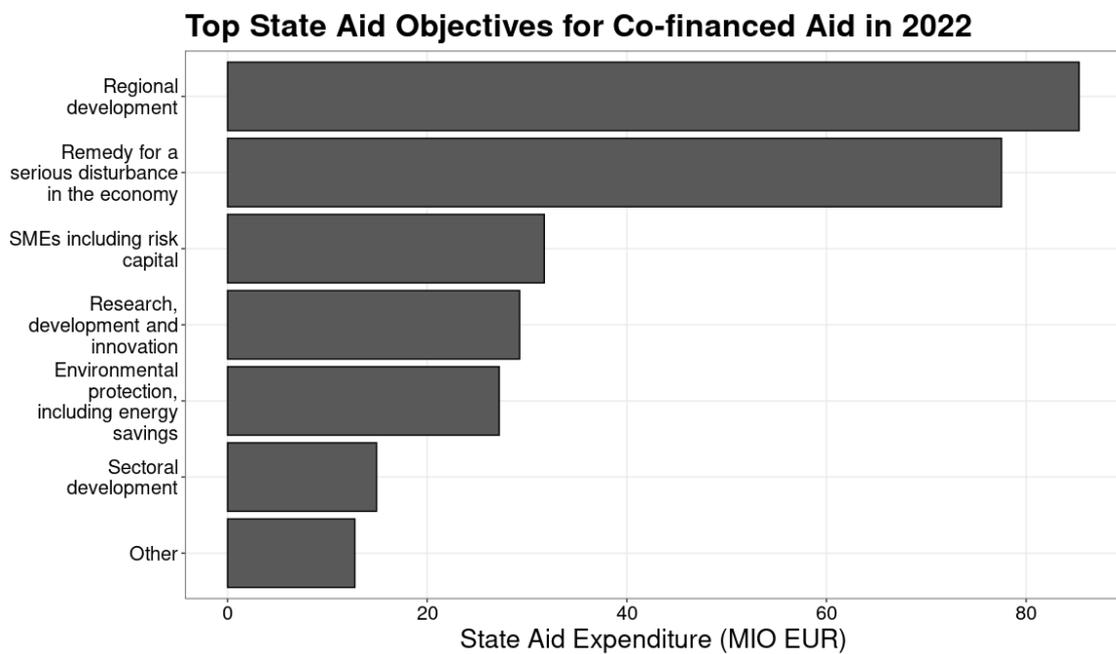


In 2022, the total State aid spending for Greece amounted to EUR 2.8 billion. The 5 biggest State aid measures absorbed 59.4% of the total spending i.e., EUR 1.7 billion.

Finally, the amount of aid co-financed with EU funds in Greece corresponded to EUR 278.7 million (around 9.8% of the total spending) and was mostly concentrated in Regional development (30.6%), Remedy for a serious disturbance in the economy (27.8%) and SMEs including risk capital (11.4%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



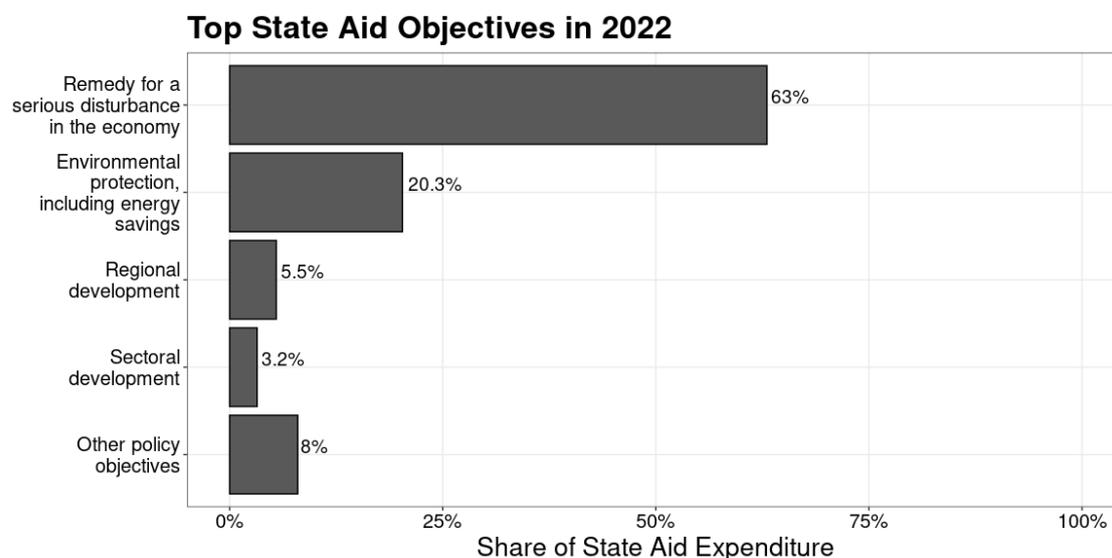
12.3 State Aid Spending - Top Objectives and Instruments

Around 83.3% of State aid spending in Greece was concentrated in two main policy objectives. Around 63% was directed towards "Remedy for a serious disturbance in the economy" while 20.3% to "Environmental protection, including energy savings".

Furthermore, Greece devoted around 5.5% towards "Regional development" and 3.2% to "Sectoral development".

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 57% of the total GBER spending, as illustrated in Table 3.1.

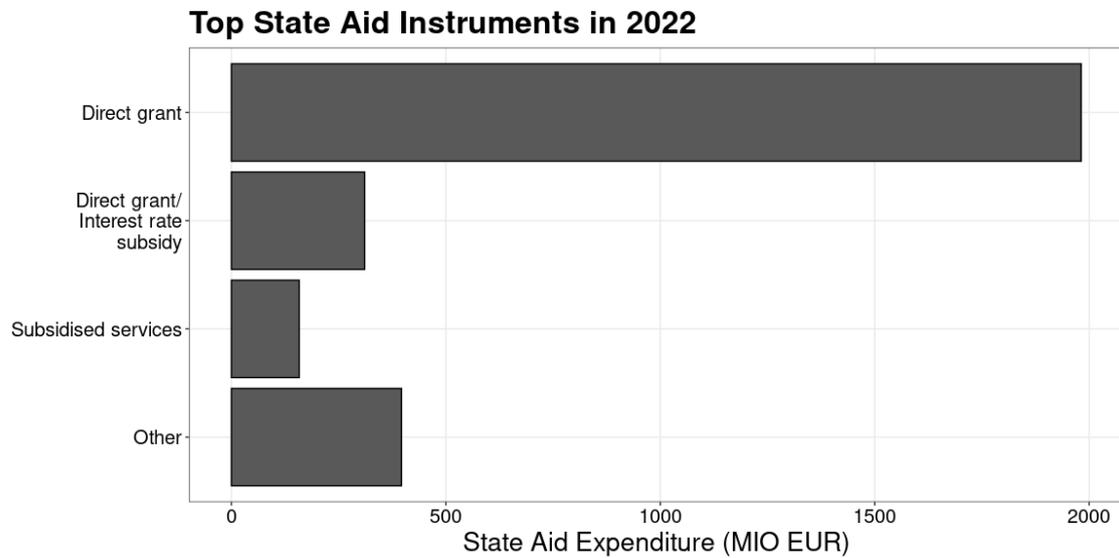
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Regional aid – investment aid (Art. 14) – Scheme	26.5%
Regional aid Scheme	13.3%
Aid schemes for audio-visual works (Art. 54)	9.8%
Industrial research (Art. 25(2)(b))	7.4%
Total top 4 GBER articles	57.0%

In terms of State aid instruments, Greece privileged the use of “Direct grant” (around EUR 2 billion, 69.6% of total State aid spending), followed by “Direct grant/ Interest rate subsidy” (EUR 310.6 million, 10.9% of total State aid spending), and “Other” (around EUR 309.8 million, 10.9% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

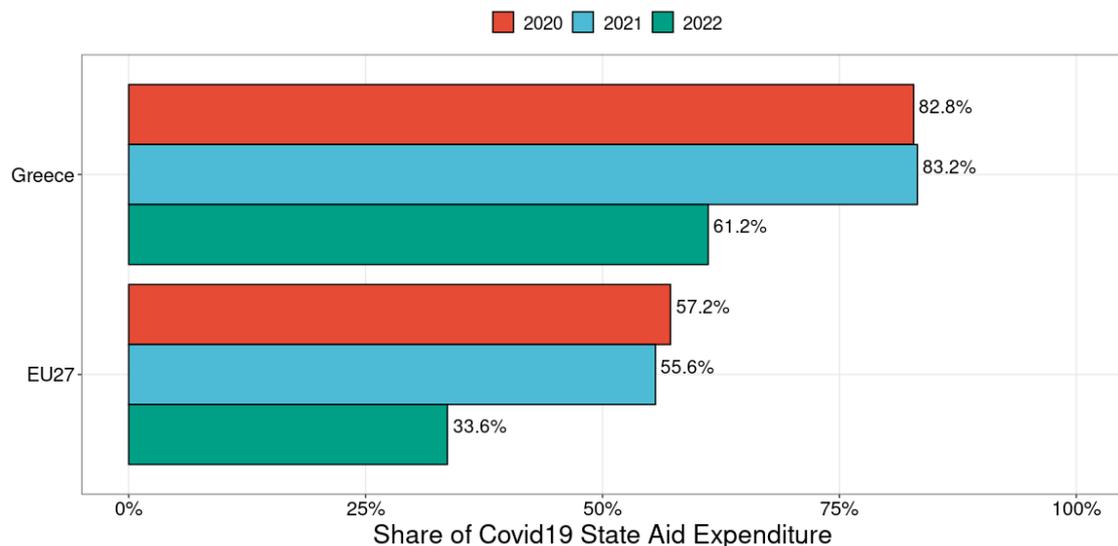
Figure 3.2: State aid expenditure for the main instruments.



12.4 State Aid Spending – Covid19

In 2022 the Covid19-related expenditure for Greece amounted to EUR 1.7 billion i.e., 61.2% of the total State aid expenditure. In 2020 this amounted to EUR 5.9 billion, i.e., 82.8% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

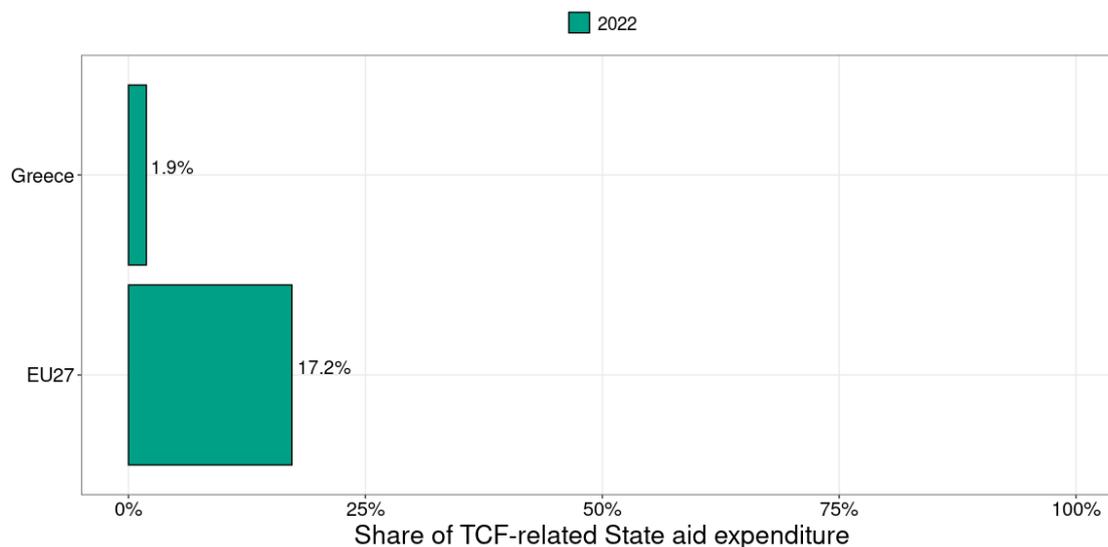


12.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Greece amounted to EUR 53.6 million i.e., 1.9% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



13 Country Focus on Croatia in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

13.1 Case and Procedural Information

The total number of active measures corresponded to 46 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

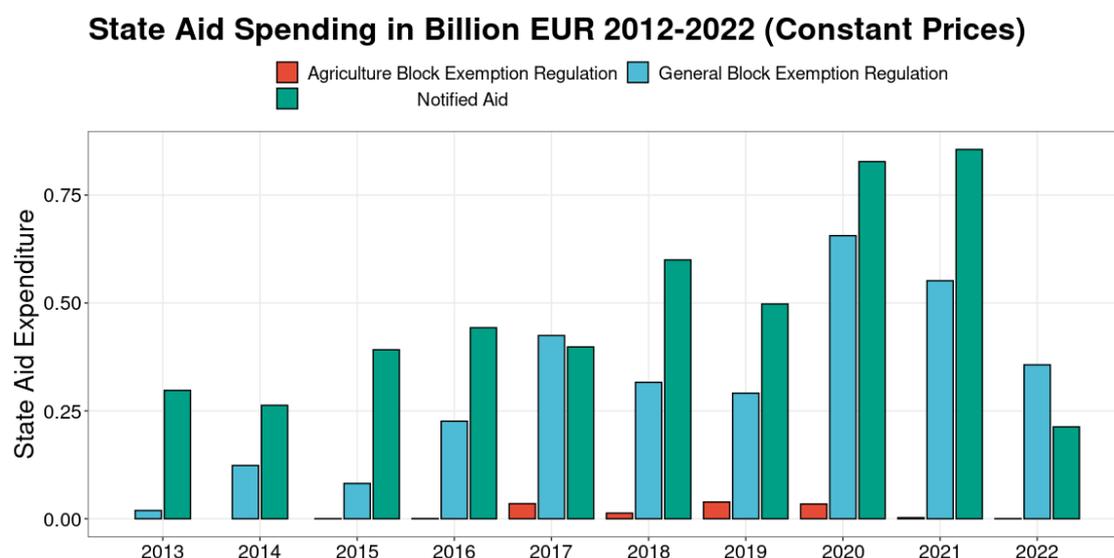
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	6	13.0%
Fisheries Block Exemption Regulation	1	2.2%
General Block Exemption Regulation	21	45.7%
Notified Aid	18	39.1%
Total	46	100.0%

In 2022, the number of GBER measures in Croatia reached 45.7% of the total number of measures, with 44% of all newly implemented measures falling under GBER.

13.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Croatia during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

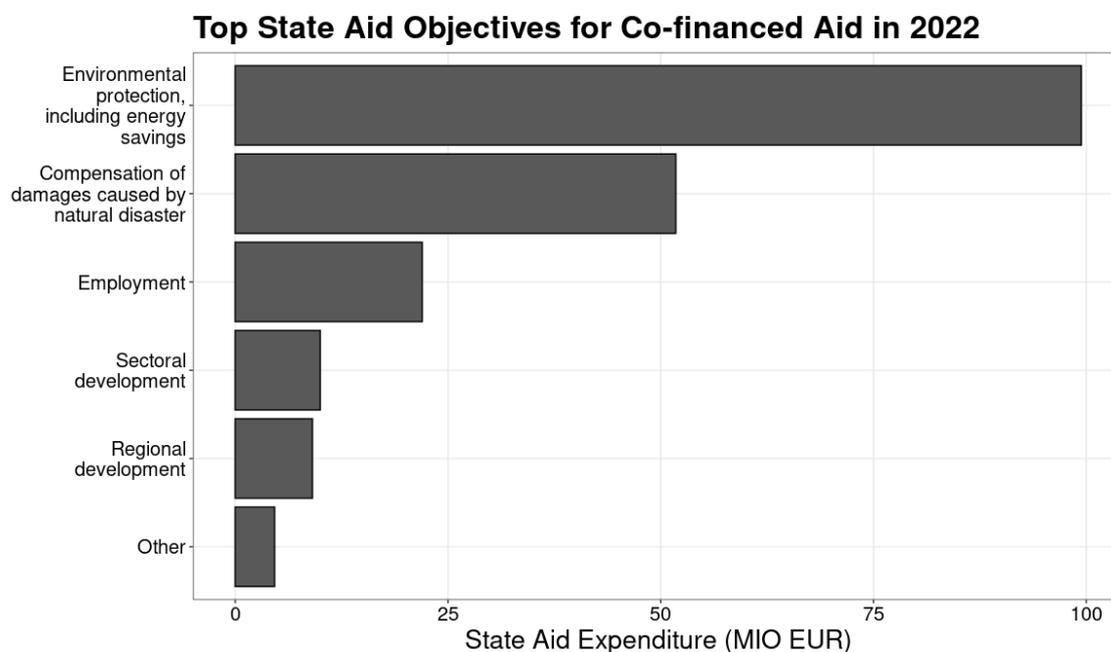


In 2022, the total State aid spending for Croatia amounted to EUR 0.6 million. The 5 biggest State aid measures in absorbed 55.1% of the total spending i.e., EUR 314.5million.

Finally, the amount of aid co-financed with EU funds in Croatia corresponded to EUR 196.9 million (around 34.5% of the total spending) and was mostly concentrated in Environmental protection, including energy savings (50.5%), Compensation of damages caused by natural disaster (26.3%) and Employment (11.1%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



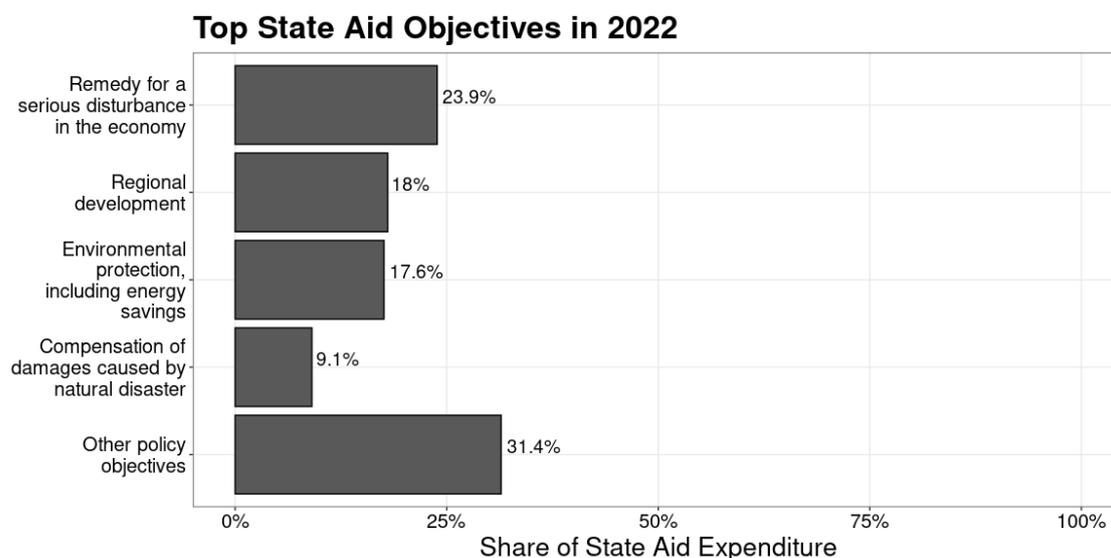
13.3 State Aid Spending - Top Objectives and Instruments

Around 41.9% of State aid spending in Croatia was concentrated in two main policy objectives. Around 23.9% was directed towards "Remedy for a serious disturbance in the economy" while 18% to "Regional development".

Furthermore, Croatia devoted around 17.6% towards "Environmental protection, including energy savings" and 9.1% to "Compensation of damages caused by natural disaster".

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 76.1% of the total GBER spending, as illustrated in Table 3.1.

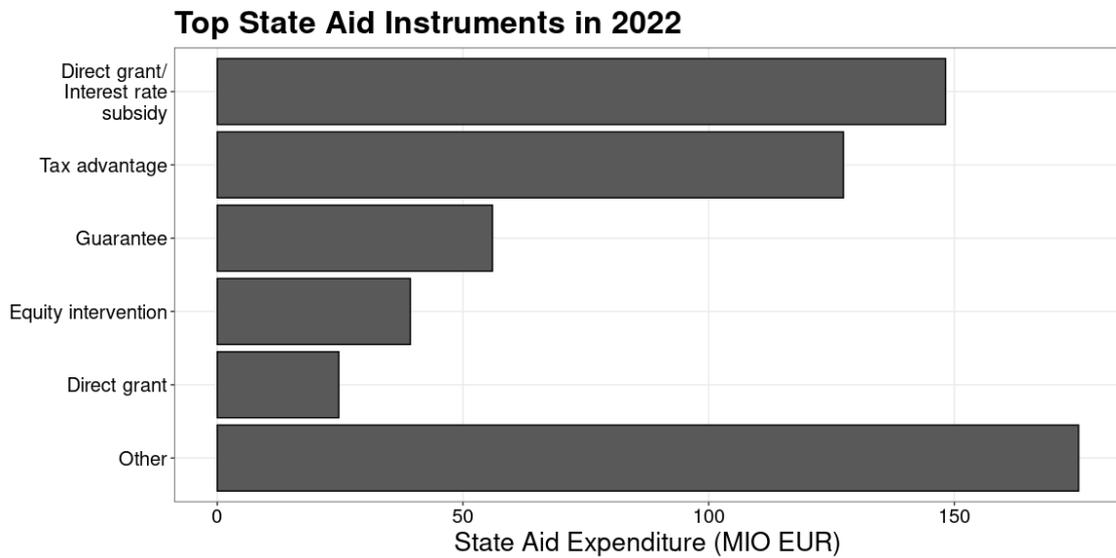
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Operating aid for the promotion of electricity from renewable sources (Art. 42)	26.7%
Regional aid - investment aid (Art. 14) - Scheme	25.4%
Aid schemes to make good the damage caused by certain natural disasters (Art. 50)	14.5%
Innovation aid for SMEs (Art. 28)	9.5%
Total top 4 GBER articles	76.1%

In terms of State aid instruments, Croatia privileged the use of "Other" (around EUR 149.3 million, 26.1% of total State aid spending), followed by "Direct grant/ Interest rate subsidy" (EUR 148.2 million, 26% of total State aid spending), and "Tax advantage" (around EUR 127.4 million, 22.3% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

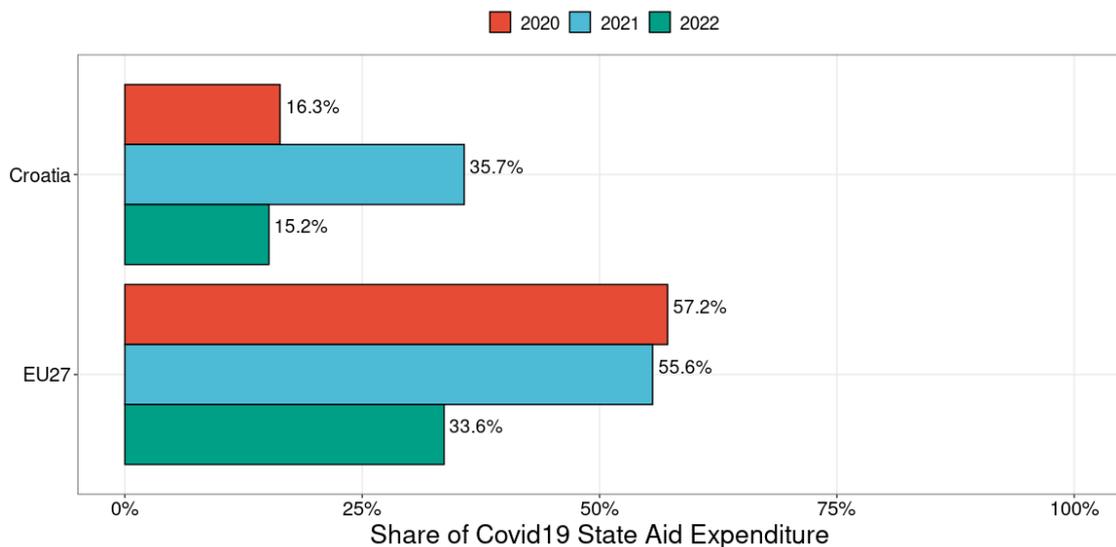
Figure 3.2: State aid expenditure for the main instruments.



13.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Croatia amounted to EUR 86.6 million i.e., 15.2% of the total State aid expenditure. In 2020 this amounted to EUR 220.4 million, i.e., 16.3% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

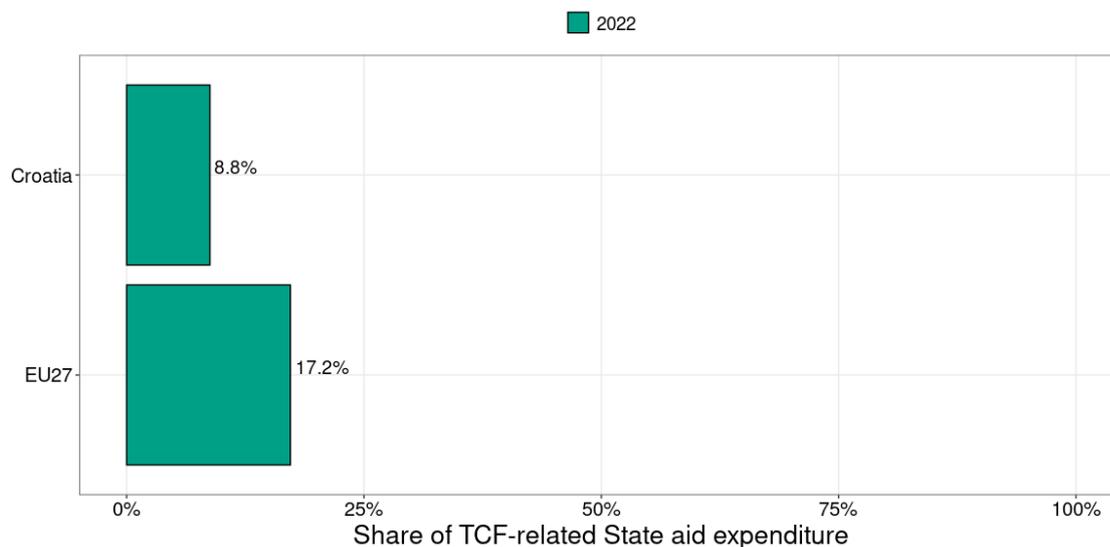


13.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Croatia amounted to EUR 50.1 million i.e., 8.8% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



14 Country Focus on Hungary in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

14.1 Case and Procedural Information

The total number of active measures corresponded to 107 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

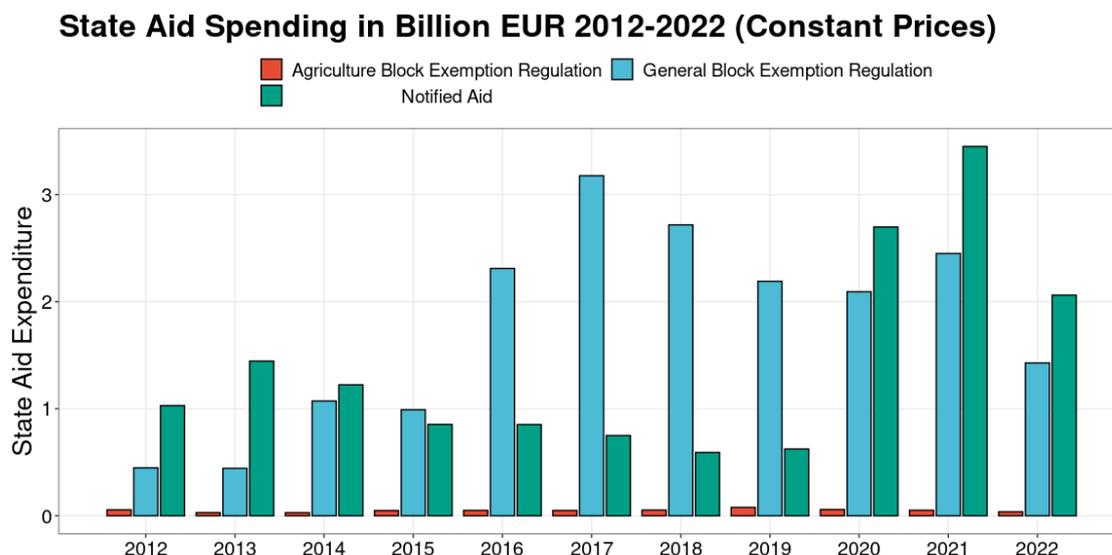
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	8	7.5%
Fisheries Block Exemption Regulation	2	1.9%
General Block Exemption Regulation	70	65.4%
Notified Aid	27	25.2%
Total	107	100.0%

In 2022, the number of GBER measures in Hungary reached 65.4% of the total number of measures, with 76.9% of all newly implemented measures falling under GBER.

14.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Hungary during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

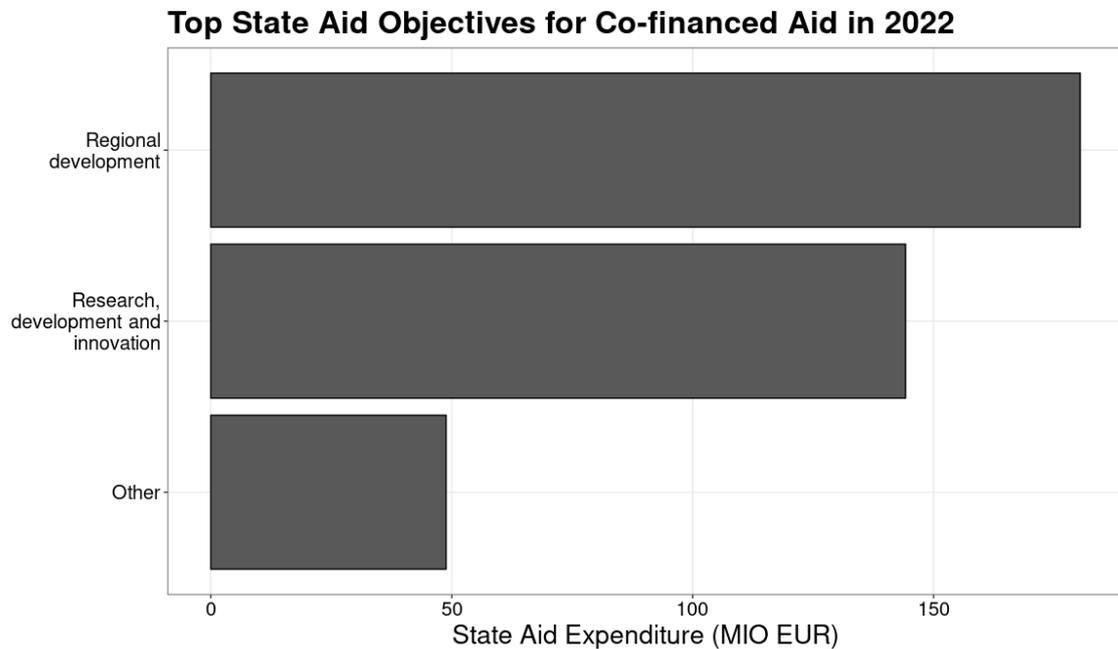


In 2022, the total State aid spending for Hungary amounted to EUR 3.5 billion. The 5 biggest State aid measures absorbed 59.7% of the total spending i.e., EUR 2.1 billion.

Finally, the amount of aid co-financed with EU funds in Hungary corresponded to EUR 373.4 million (around 10.6% of the total spending) and was mostly concentrated in Regional development (48.3%), Research, development and innovation (38.6%) and SMEs including risk capital (3.1%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



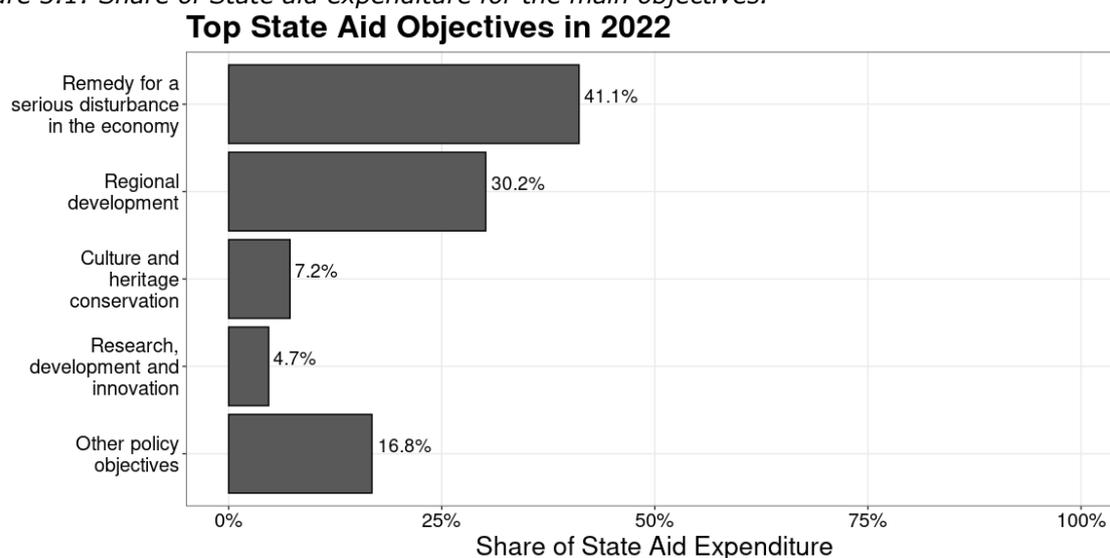
14.3 State Aid Spending - Top Objectives and Instruments

Around 71.3% of State aid spending in Hungary was concentrated in two main policy objectives. Around 41.1% was directed towards “Remedy for a serious disturbance in the economy” while 30.2% to “Regional development”.

Furthermore, Hungary devoted around 7.2% towards “Culture and heritage conservation” and 4.7% to “Research, development and innovation”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 77.2% of the total GBER spending, as illustrated in Table 3.1.

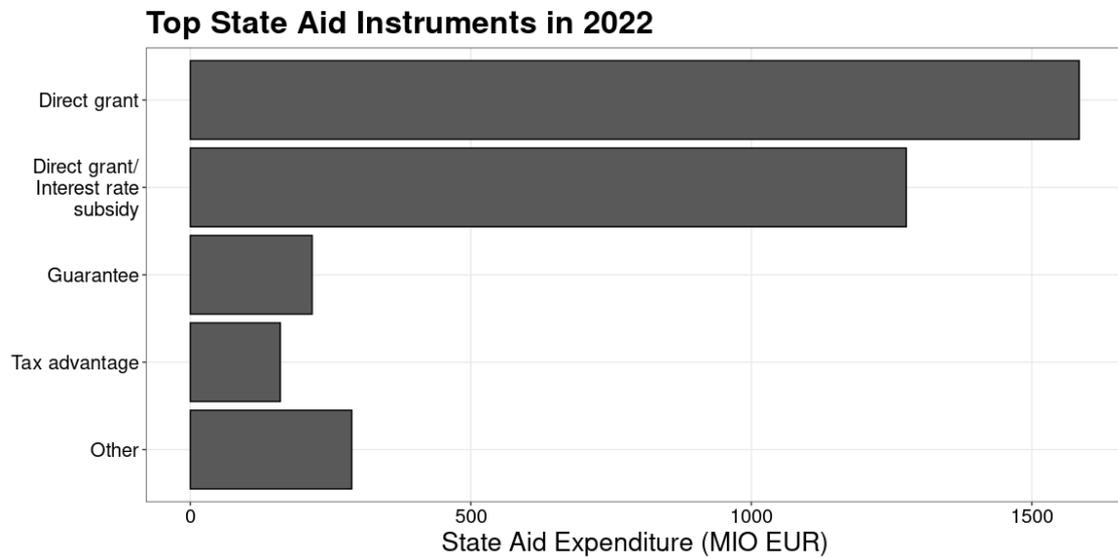
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Regional aid - investment aid (Art. 14) - Scheme	58.9%
Experimental development (Art. 25(2)(c))	6.7%
Aid for compensating the additional costs of employing workers with disabilities (Art. 34)	6.0%
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	5.6%
Total top 4 GBER articles	77.2%

In terms of State aid instruments, Hungary privileged the use of “Direct grant” (around EUR 1.6 billion, 44.9% of total State aid spending), followed by “Direct grant/ Interest rate subsidy” (EUR 1.3 billion, 36.2% of total State aid spending), and “Guarantee” (around EUR 217 million, 6.2% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

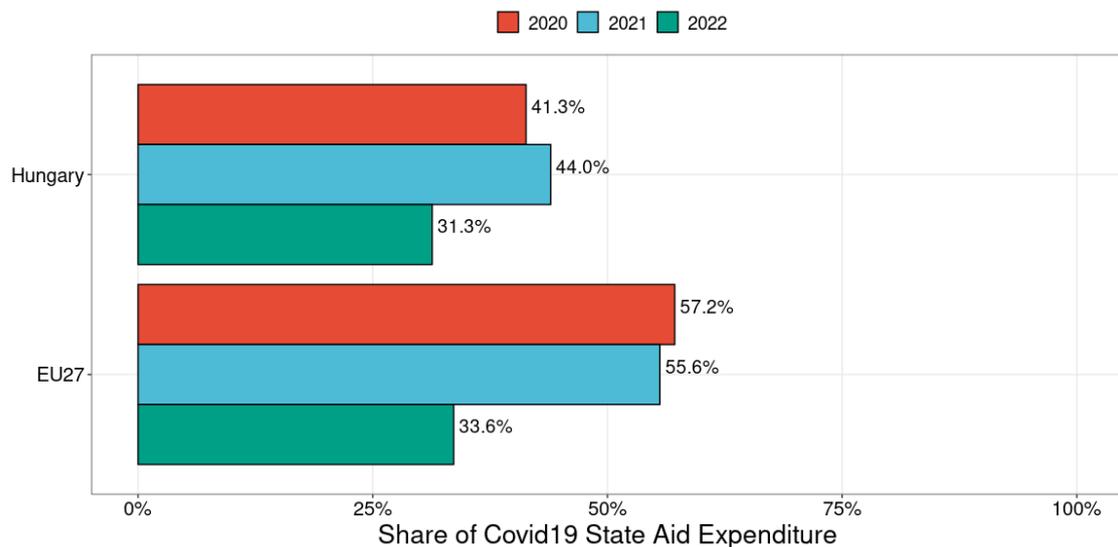
Figure 3.2: State aid expenditure for the main instruments.



14.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Hungary amounted to EUR 1.1 billion i.e., 31.3% of the total State aid expenditure. In 2020 this amounted to EUR 1.8 billion, i.e., 41.3% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

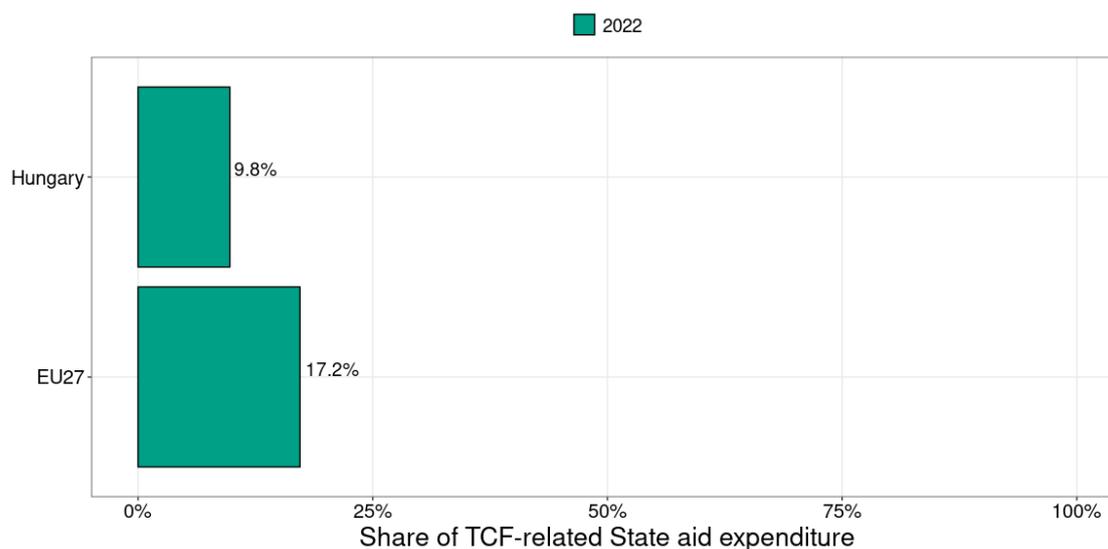


14.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Hungary amounted to EUR 344.7 million i.e., 9.8% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



15 Country Focus on Ireland in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

15.1 Case and Procedural Information

The total number of active measures corresponded to 123 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	31	25.2%
General Block Exemption Regulation	43	35.0%
Notified Aid	49	39.8%
Total	123	100.0%

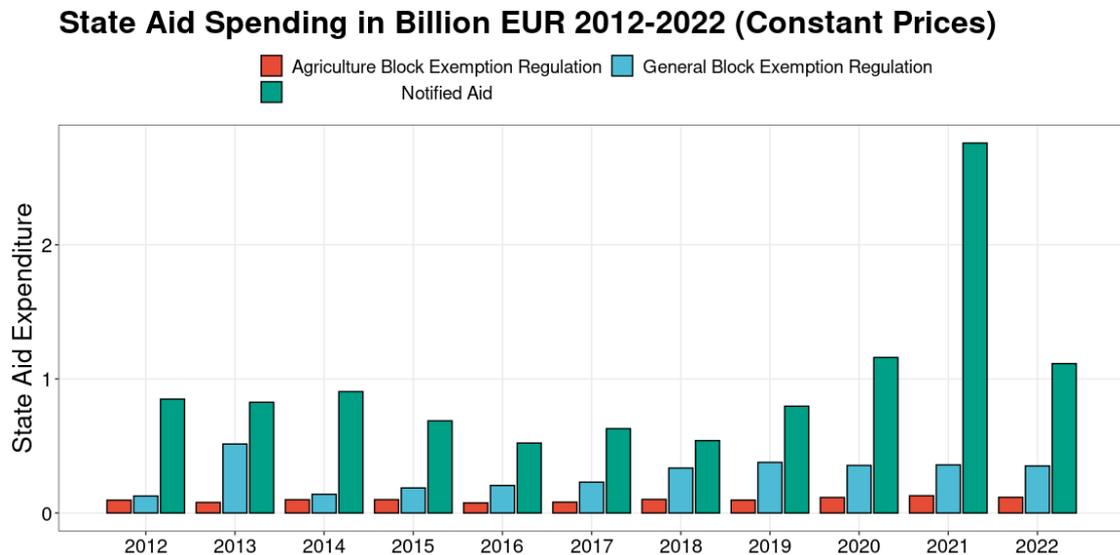
In 2022, the number of GBER measures in Ireland reached 35.0% of the total number of measures, with 25% of all newly implemented measures falling under GBER.

15.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Ireland during the period 2012-2022 in constant prices adjusted by the yearly value

of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

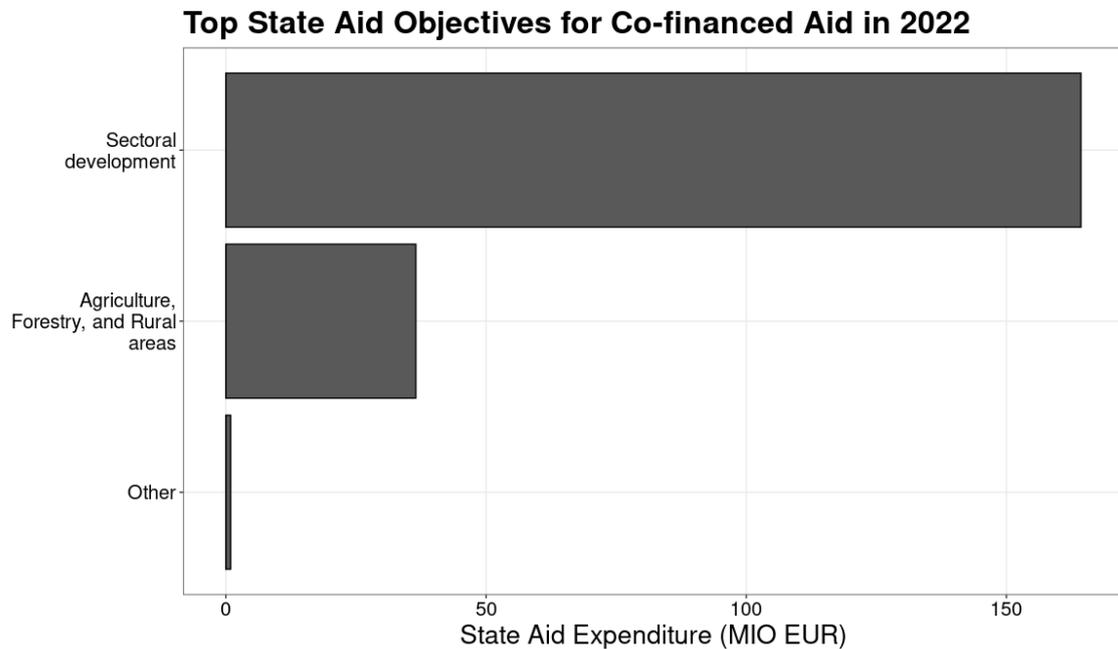


In 2022, the total State aid spending for Ireland amounted to EUR 1.6 million. The 5 biggest State aid measures in absorbed 49.7% of the total spending i.e., EUR 787.1million.

Finally, the amount of aid co-financed with EU funds in Ireland corresponded to EUR 201.8 million (around 12.7% of the total spending) and was mostly concentrated in Sectoral development (81.4%), Agriculture, Forestry, and Rural areas (18.1%) and Research, development and innovation (0.5%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



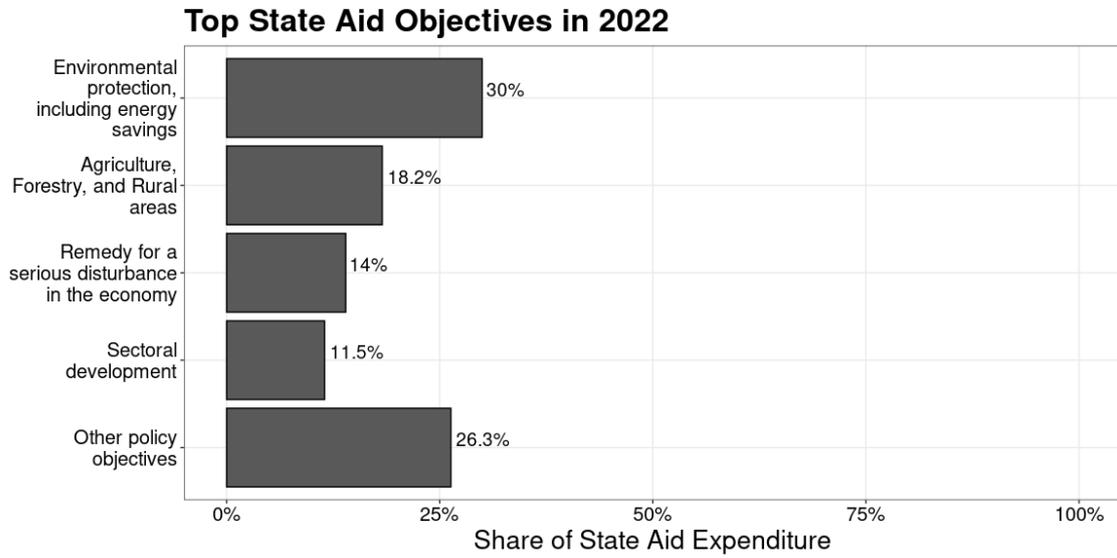
15.3 State Aid Spending - Top Objectives and Instruments

Around 48.2% of State aid spending in Ireland was concentrated in two main policy objectives. Around 30% was directed towards “Environmental protection, including energy savings” while 18.2% to “Agriculture, Forestry, and Rural areas”.

Furthermore, Ireland devoted around 14% towards “Remedy for a serious disturbance in the economy” and 11.5% to “Sectoral development”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 59.4% of the total GBER spending, as illustrated in Table 3.1.

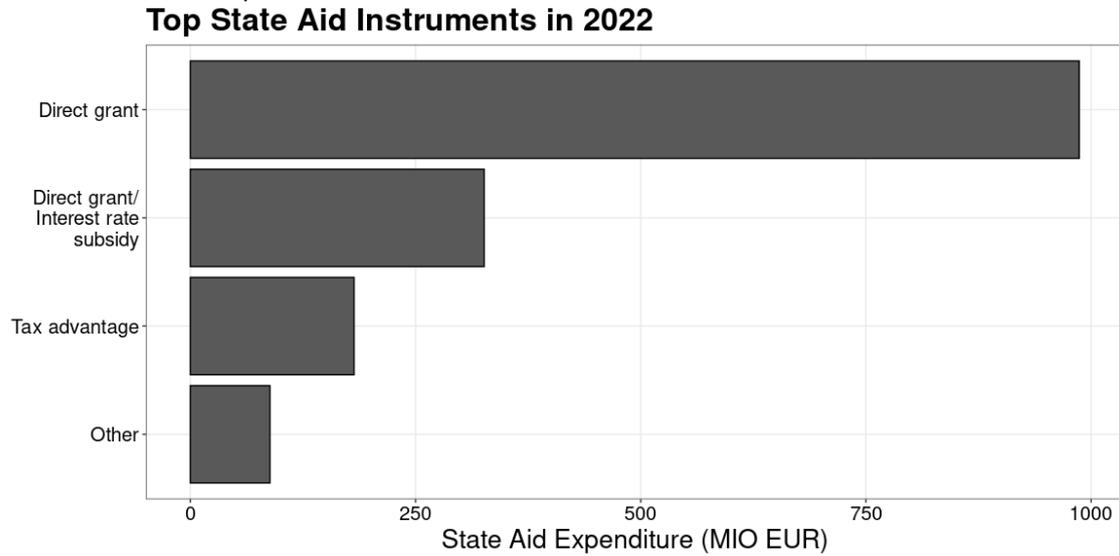
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Training aid (Art. 31)	20.3%
Experimental development (Art. 25(2)©)	18.0%
Aid schemes for audio-visual works (Art. 54)	11.0%
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	10.1%
Total top 4 GBER articles	59.4%

In terms of State aid instruments, Ireland privileged the use of “Direct grant” (around EUR 986.8 million, 62.3% of total State aid spending), followed by “Direct grant/ Interest rate subsidy” (EUR 326.1 million, 20.6% of total State aid spending), and “Tax advantage” (around EUR 181.7 million, 11.5% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

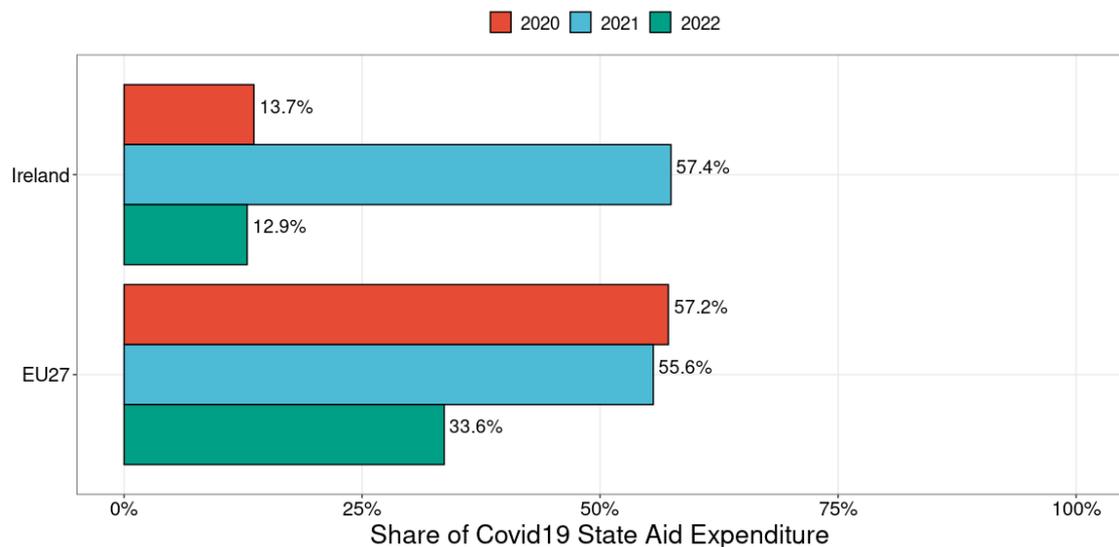
Figure 3.2: State aid expenditure for the main instruments.



15.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Ireland amounted to EUR 204.8 million i.e., 12.9% of the total State aid expenditure. In 2020 this amounted to EUR 208.5 million, i.e., 13.7% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

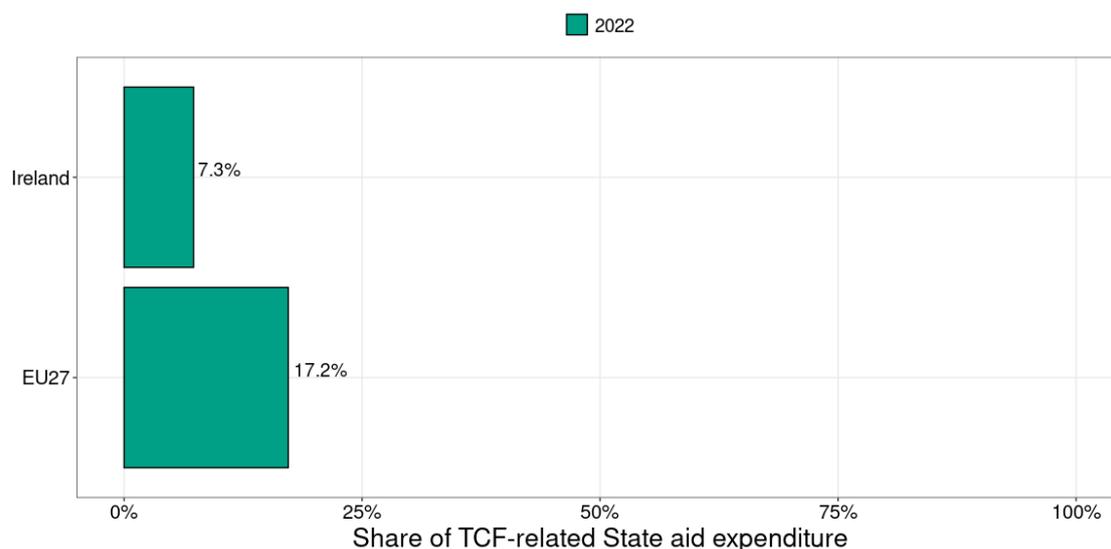


15.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Ireland amounted to EUR 115.6 million i.e., 7.3% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



16 Country Focus on Italy in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

16.1 Case and Procedural Information

The total number of active measures corresponded to 973 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

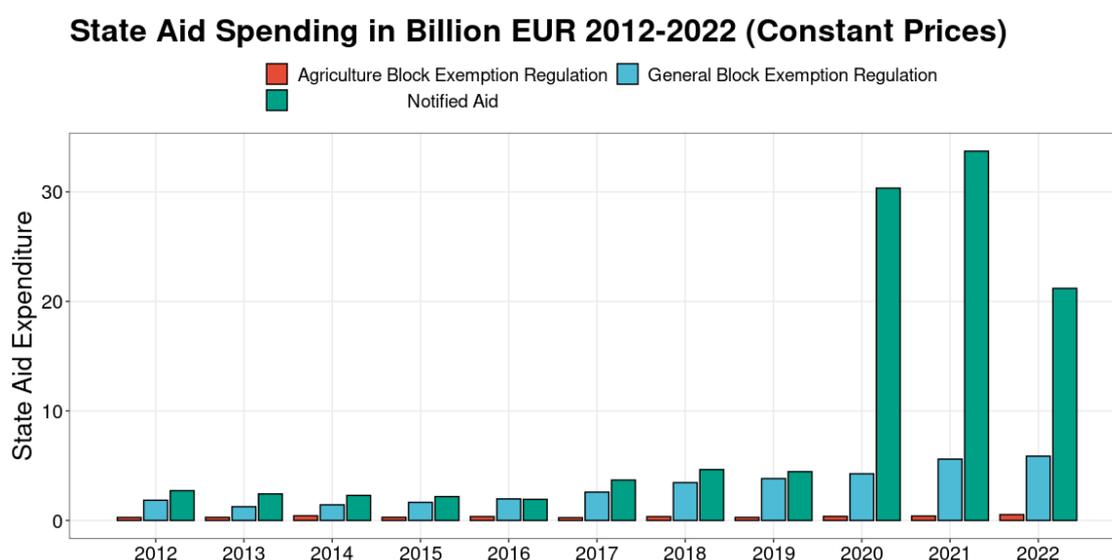
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	184	18.9%
Fisheries Block Exemption Regulation	6	0.6%
General Block Exemption Regulation	593	61.0%
Notified Aid	190	19.5%
Total	973	100.0%

In 2022, the number of GBER measures in Italy reached 61.0% of the total number of measures, with 62.6% of all newly implemented measured falling under GBER.

16.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Italy during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

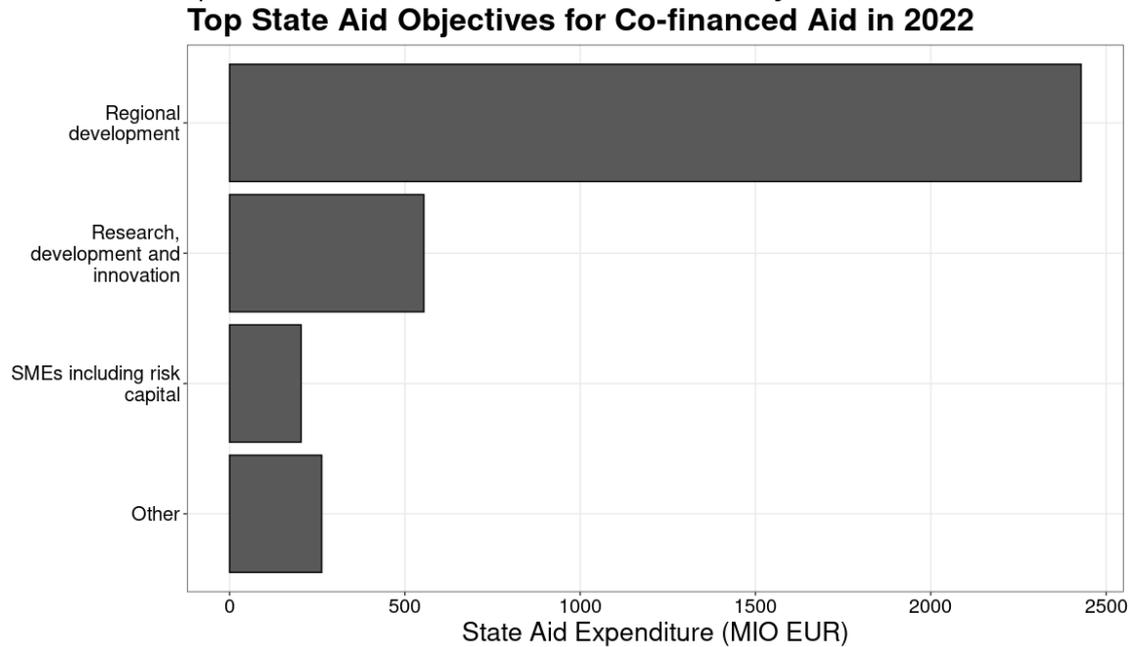


In 2022, the total State aid spending for Italy amounted to EUR 27.6 billion. The 5 biggest State aid measures absorbed 38.6% of the total spending i.e., EUR 10.6 billion.

Finally, the amount of aid co-financed with EU funds in Italy corresponded to EUR 3.5 billion (around 12.5% of the total spending) and was mostly concentrated in Regional development (70.4%), Research, development and innovation (16.1%) and SMEs including risk capital (5.9%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



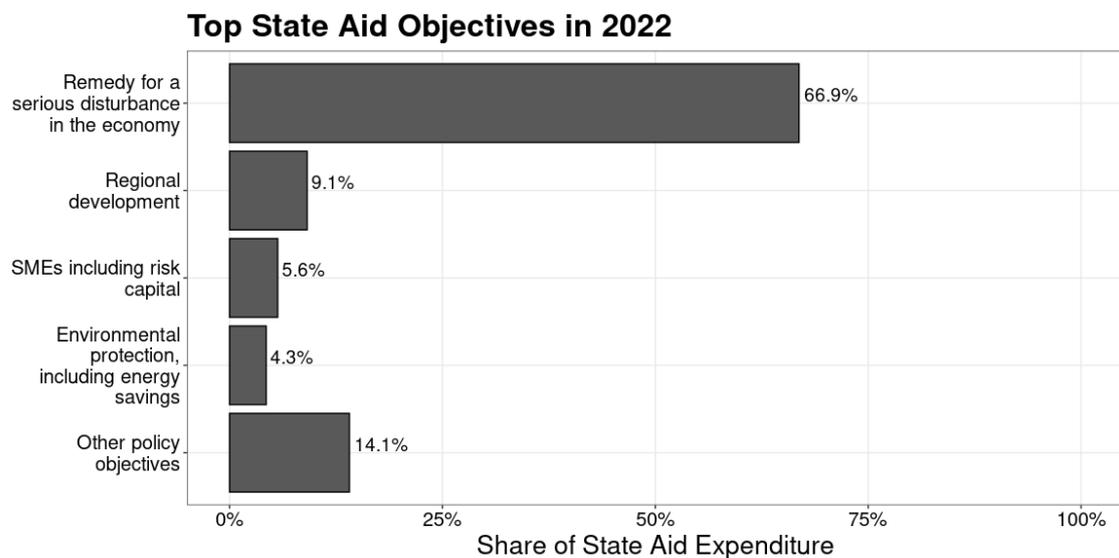
16.3 State Aid Spending - Top Objectives and Instruments

Around 76% of State aid spending in Italy was concentrated in two main policy objectives. Around 66.9% was directed towards “Remedy for a serious disturbance in the economy” while 9.1% to “Regional development”.

Furthermore, Italy devoted around 5.6% towards “SMEs including risk capital” and 4.3% to “Environmental protection, including energy savings”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 80.6% of the total GBER spending, as illustrated in Table 3.1.

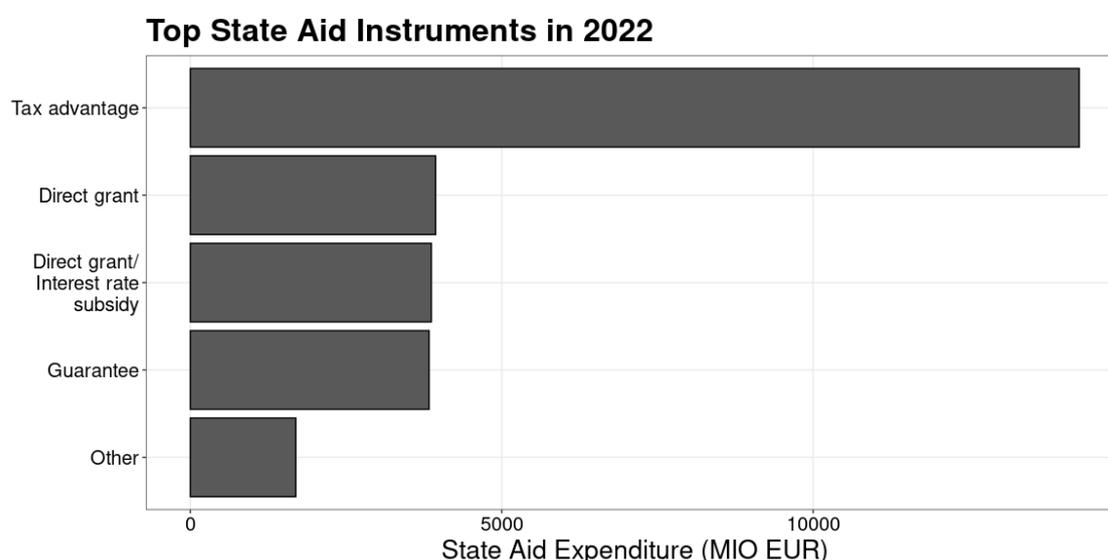
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Regional aid - investment aid (Art. 14) - Scheme	41.5%
Investment aid to SMEs (Art. 17)	20.5%
Training aid (Art. 31)	12.6%
Industrial research (Art. 25(2)(b))	6.0%
Total top 4 GBER articles	80.6%

In terms of State aid instruments, Italy privileged the use of "Tax advantage" (around EUR 14.3 billion, 51.7% of total State aid spending), followed by "Direct grant" (EUR 3.9 billion, 14.3% of total State aid spending), and "Direct grant/ Interest rate subsidy" (around EUR 3.9 billion, 14% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

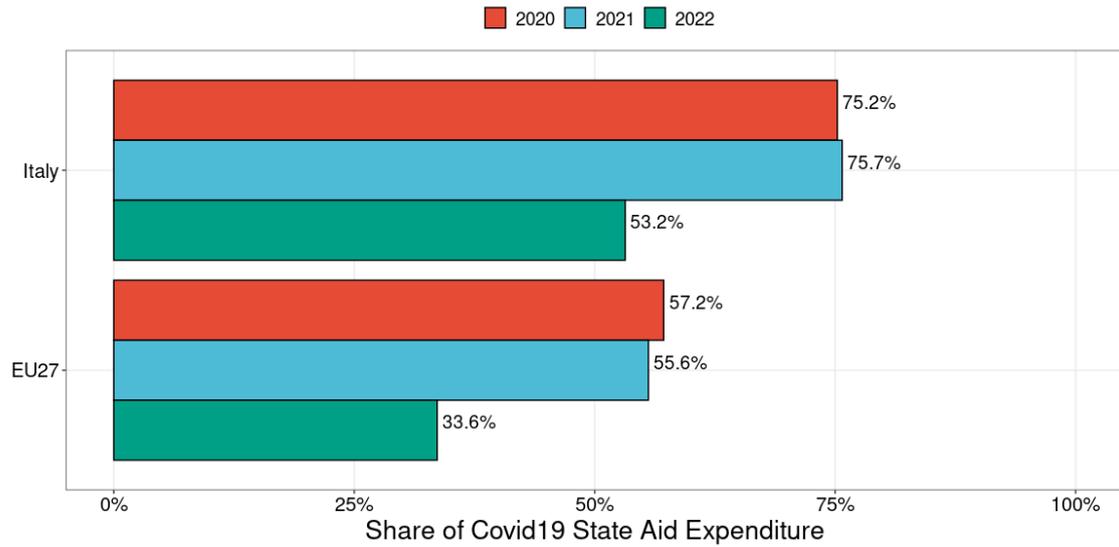
Figure 3.2: State aid expenditure for the main instruments.



16.4 State Aid Spending – Covid19

In 2022 the Covid19-related expenditure for Italy amounted to EUR 14.7 billion i.e., 53.2% of the total State aid expenditure. In 2020 this amounted to EUR 25.3 billion, i.e., 75.2% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

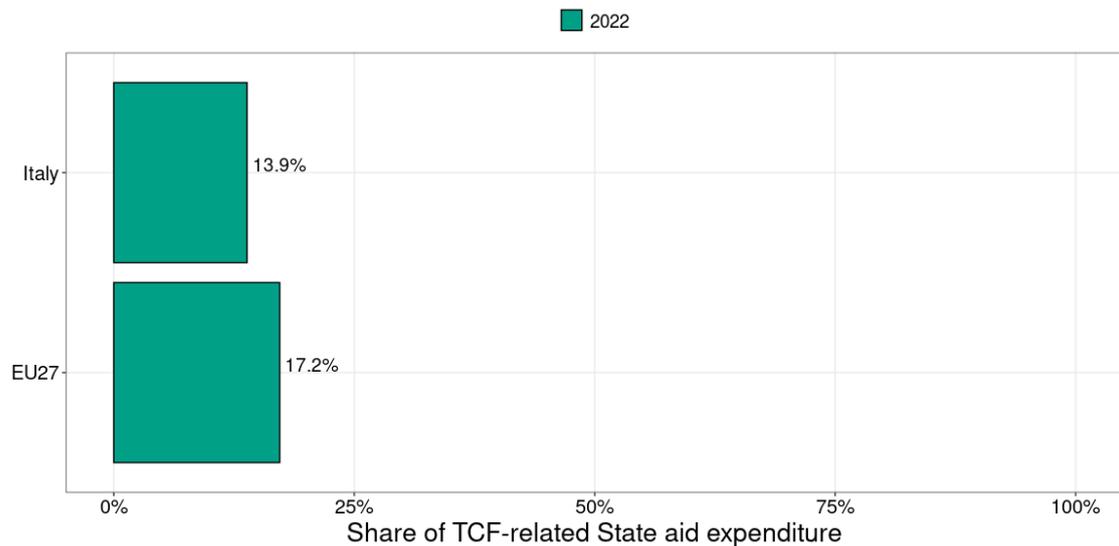


16.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Italy amounted to EUR 3.8 billion i.e., 13.9% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



17 Country Focus on Lithuania in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

17.1 Case and Procedural Information

The total number of active measures corresponded to 142 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

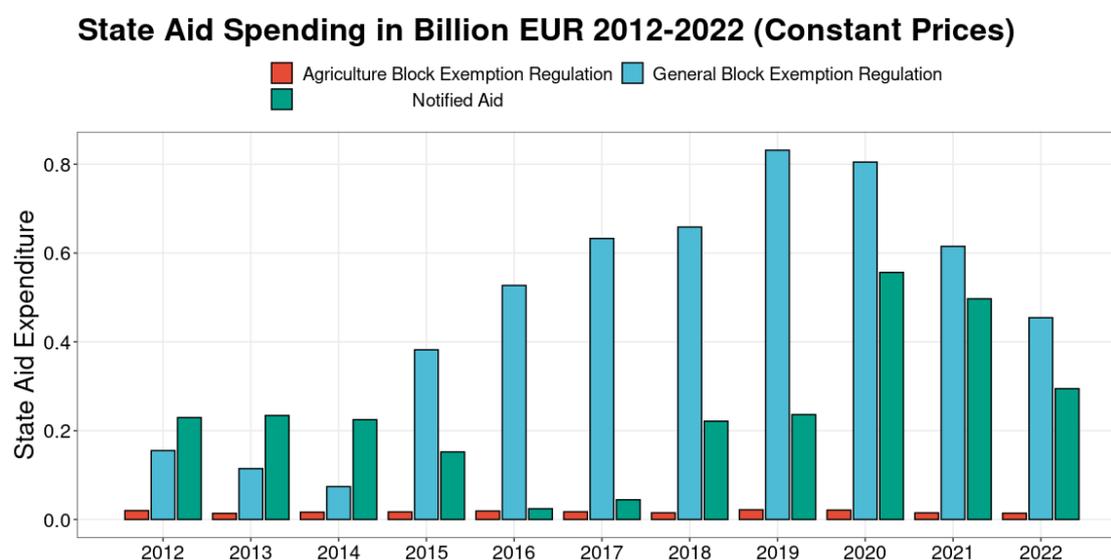
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	15	10.6%
Fisheries Block Exemption Regulation	2	1.4%
General Block Exemption Regulation	93	65.5%
Notified Aid	32	22.5%
Total	142	100.0%

In 2022, the number of GBER measures in Lithuania reached 65.5% of the total number of measures, with 59.1% of all newly implemented measures falling under GBER.

17.2 State Aid Spending – Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Lithuania during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

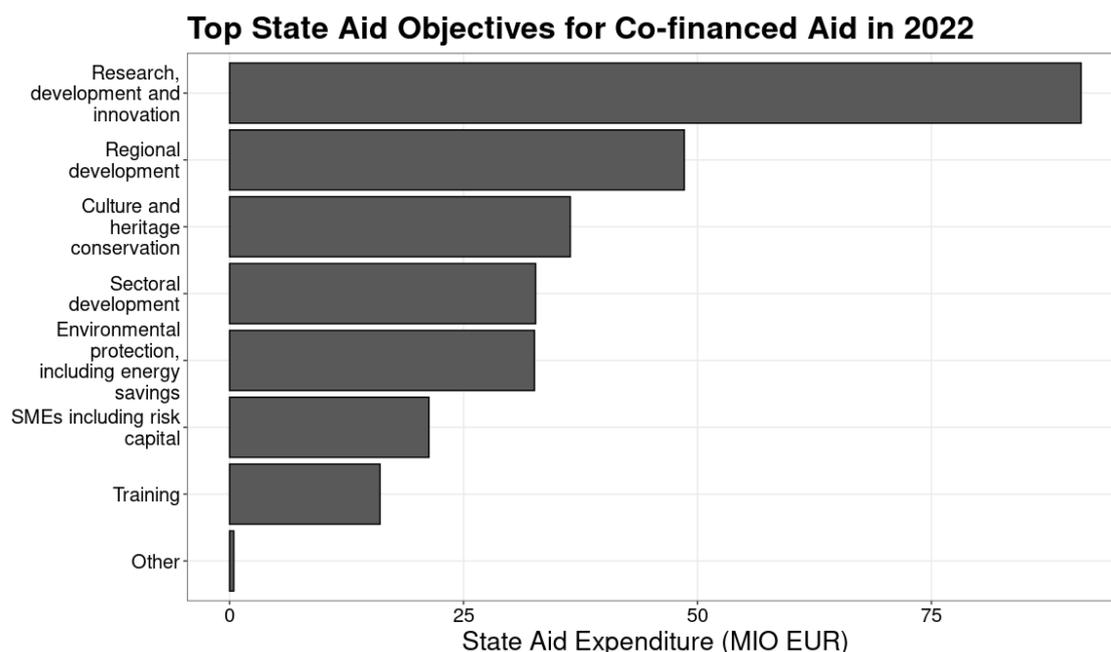


In 2022, the total State aid spending for Lithuania amounted to EUR 0.8 million. The 5 biggest State aid measures absorbed 38.6% of the total spending i.e., EUR 294.9million.

Finally, the amount of aid co-financed with EU funds in Lithuania corresponded to EUR 279.1 million (around 36.5% of the total spending) and was mostly concentrated in Research, development and innovation (32.6%), Regional development (17.4%) and Culture and heritage conservation (13%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



17.3 State Aid Spending - Top Objectives and Instruments

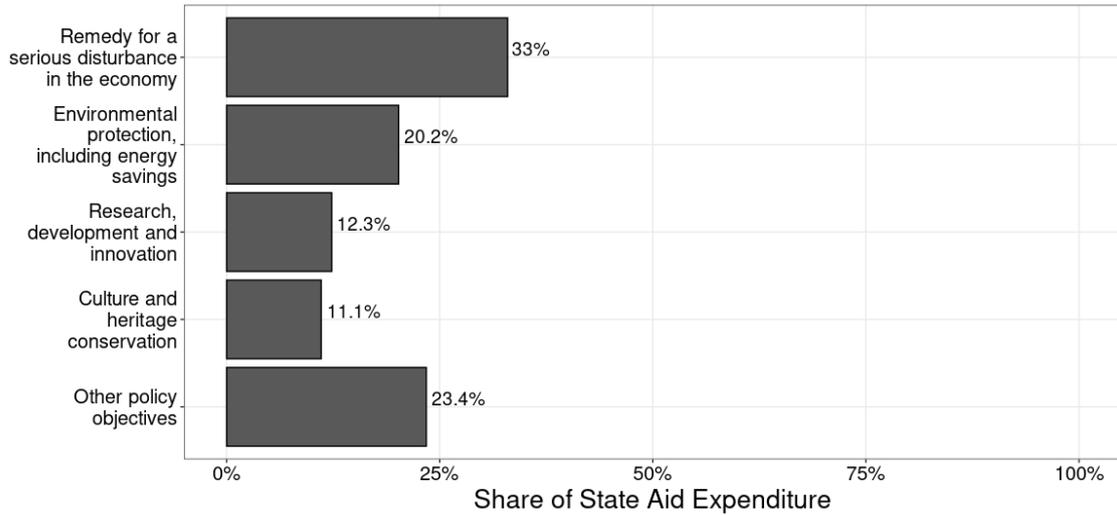
Around 53.2% of State aid spending in Lithuania was concentrated in two main policy objectives. Around 33% was directed towards “Remedy for a serious disturbance in the economy” while 20.2% to “Environmental protection, including energy savings”.

Furthermore, Lithuania devoted around 12.3% towards “Research, development and innovation” and 11.1% to “Culture and heritage conservation”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.

Top State Aid Objectives in 2022



As to GBER, the top 4 key articles absorbed about 56.7% of the total GBER spending, as illustrated in Table 3.1.

Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

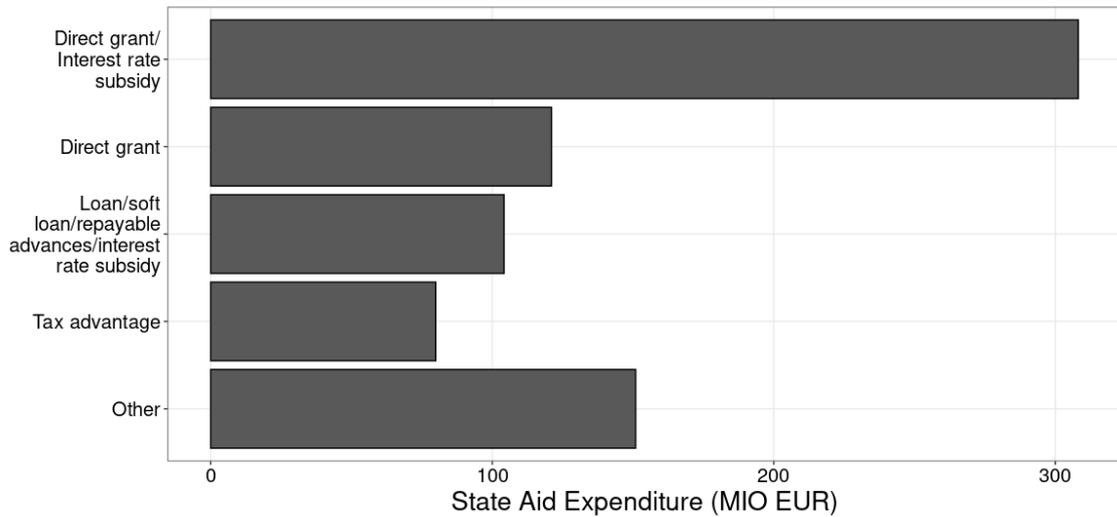
Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	15.7%
Aid for culture and heritage conservation (Art. 53)	15.3%
Industrial research (Art. 25(2)(b))	15.0%
Regional aid - investment aid (Art. 14) - Scheme	10.7%
Total top 4 GBER articles	56.7%

In terms of State aid instruments, Lithuania privileged the use of "Direct grant/ Interest rate subsidy" (around EUR 308.2 million, 40.3% of total State aid spending), followed by "Direct grant" (EUR 121 million, 15.8% of total State aid spending), and "Other" (around EUR 111.6 million, 14.6% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

Figure 3.2: State aid expenditure for the main instruments.

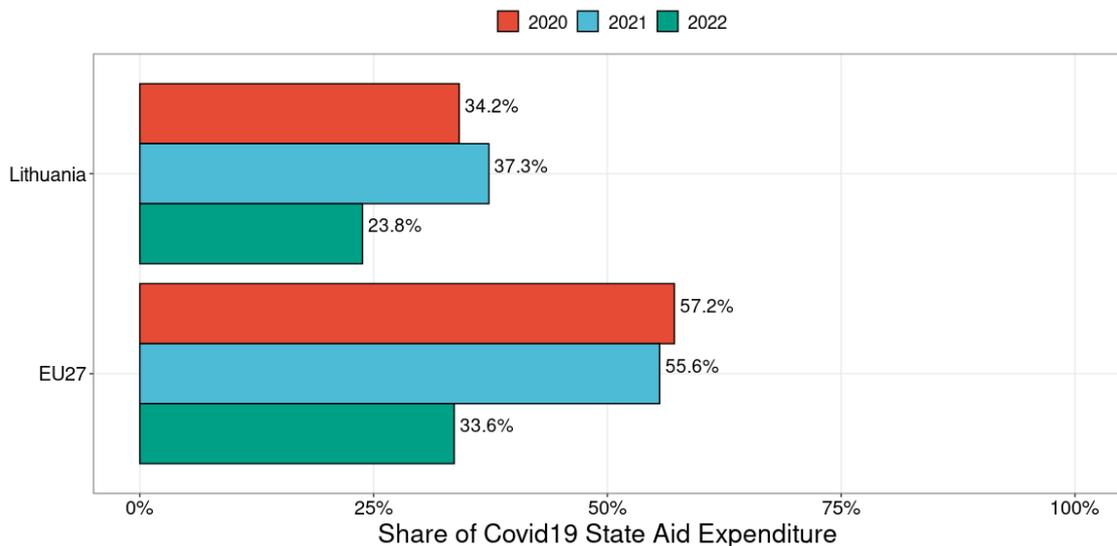
Top State Aid Instruments in 2022



17.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Lithuania amounted to EUR 182 million i.e., 23.8% of the total State aid expenditure. In 2020 this amounted to EUR 341.2 million, i.e., 34.2% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

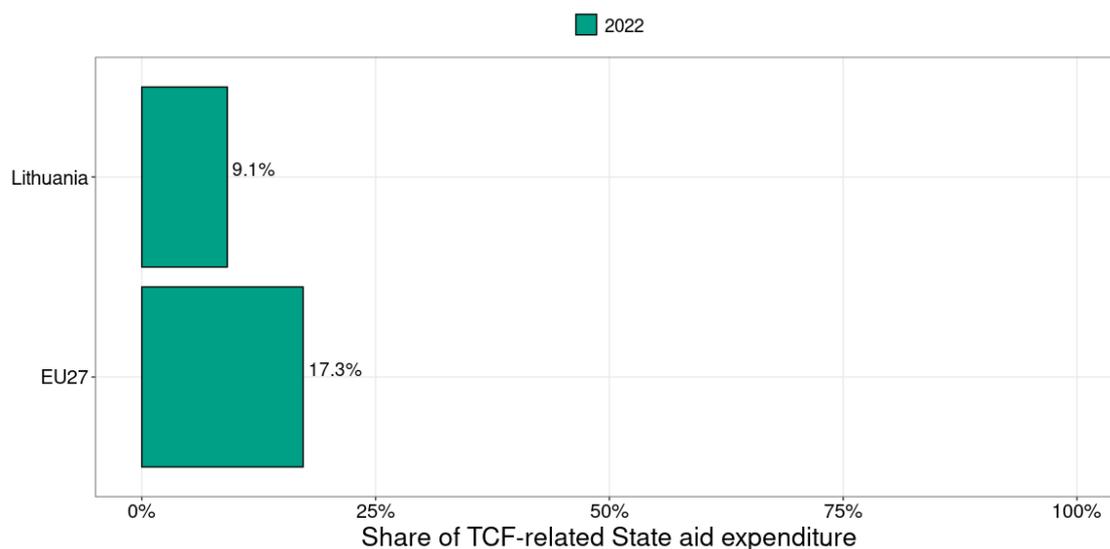


17.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Lithuania amounted to EUR 69.9 million i.e., 9.1% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



18 Country Focus on Luxembourg in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

18.1 Case and Procedural Information

The total number of active measures corresponded to 37 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

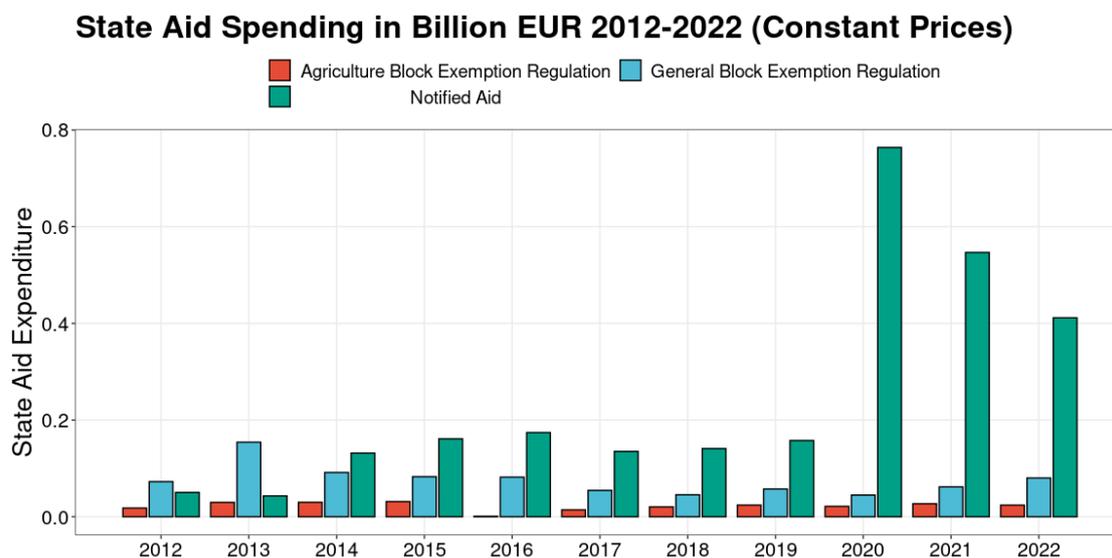
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	15	40.5%
General Block Exemption Regulation	4	10.8%
Notified Aid	18	48.7%
Total	37	100.0%

In 2022, the number of GBER measures in Luxembourg reached 10.8% of the total number of measures, with % of all newly implemented measured falling under GBER.

18.2 State Aid Spending – Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Luxembourg during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

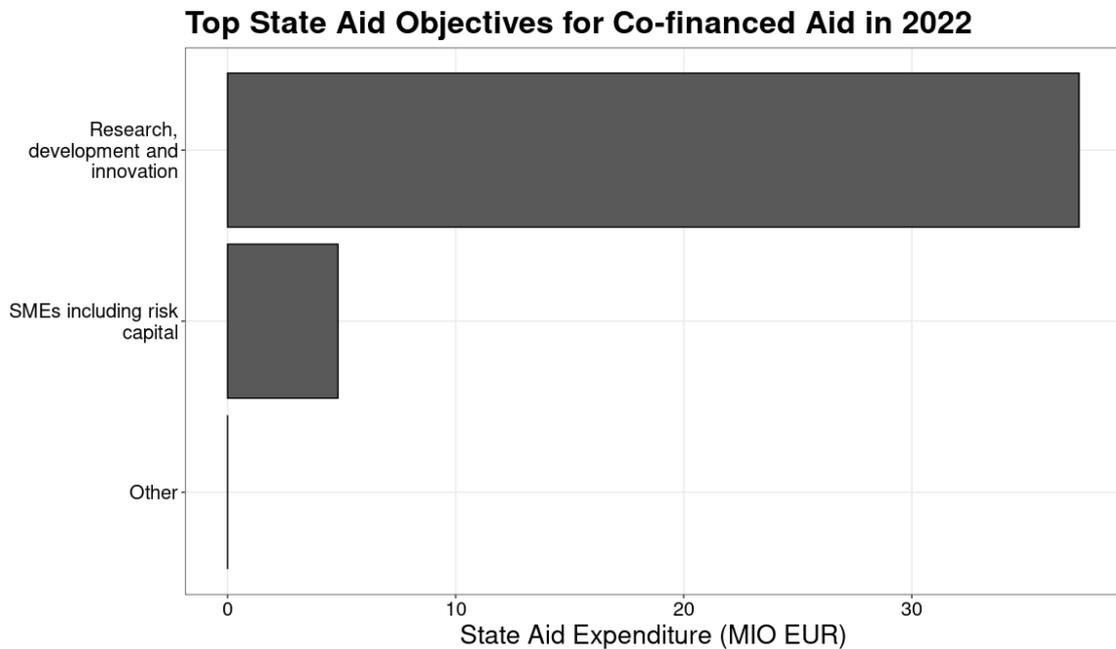


In 2022, the total State aid spending for Luxembourg amounted to EUR 0.5 million. The 5 biggest State aid measures in absorbed 76.1% of the total spending i.e., EUR 392.6million.

Finally, the amount of aid co-financed with EU funds in Luxembourg corresponded to EUR 42.2 million (around 8.2% of the total spending) and was mostly concentrated in Research, development and innovation (88.5%), SMEs including risk capital (11.5%) and Agriculture, Forestry, and Rural areas (0%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



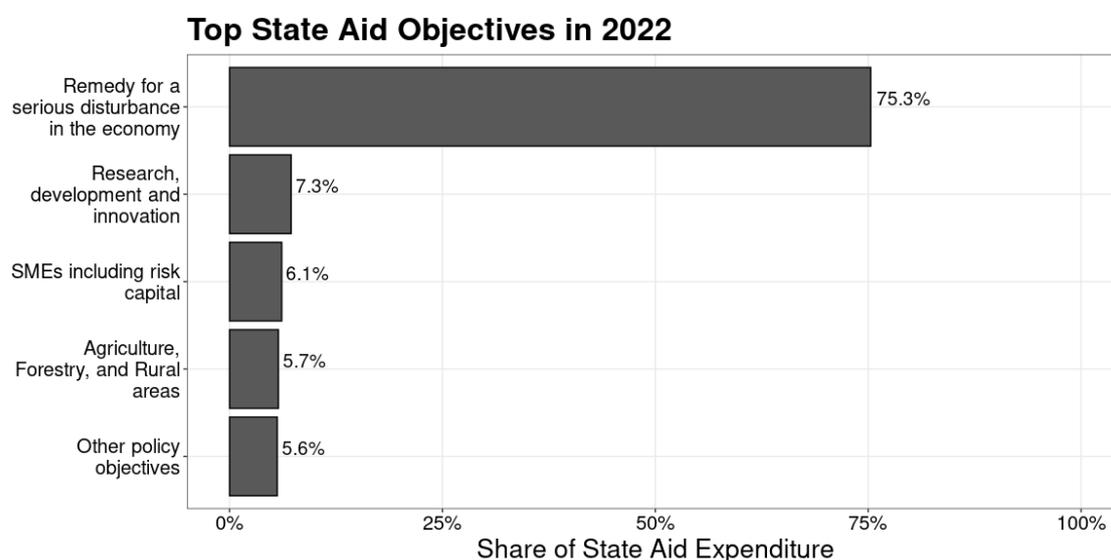
18.3 State Aid Spending – Top Objectives and Instruments

Around 82.6% of State aid spending in Luxembourg was concentrated in two main policy objectives. Around 75.3% was directed towards “Remedy for a serious disturbance in the economy” while 7.3% to “Research, development and innovation”.

Furthermore, Luxembourg devoted around 6.1% towards “SMEs including risk capital” and 5.7% to “Agriculture, Forestry, and Rural areas”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 75% of the total GBER spending, as illustrated in Table 3.1.

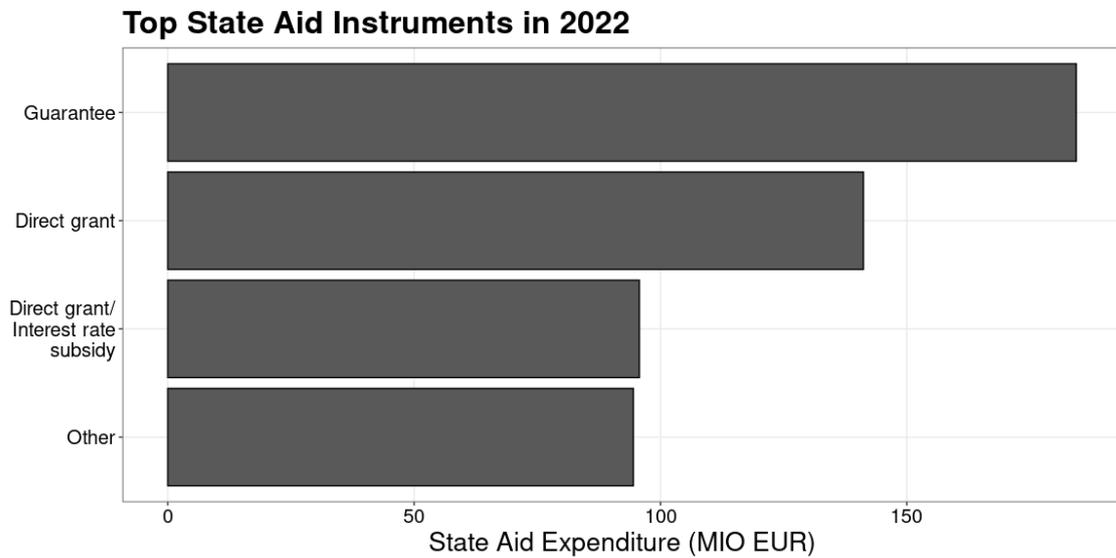
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Investment aid to SMEs (Art. 17)	30.5%
Industrial research (Art. 25(2)(b))	25.0%
Experimental development (Art. 25(2)(c))	11.8%
Investment aid for the promotion of energy from renewable sources (Art. 41)	7.7%
Total top 4 GBER articles	75.0%

In terms of State aid instruments, Luxembourg privileged the use of “Guarantee” (around EUR 184.4 million, 35.7% of total State aid spending), followed by “Direct grant” (EUR 141.2 million, 27.4% of total State aid spending), and “Direct grant/ Interest rate subsidy” (around EUR 95.7 million, 18.6% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

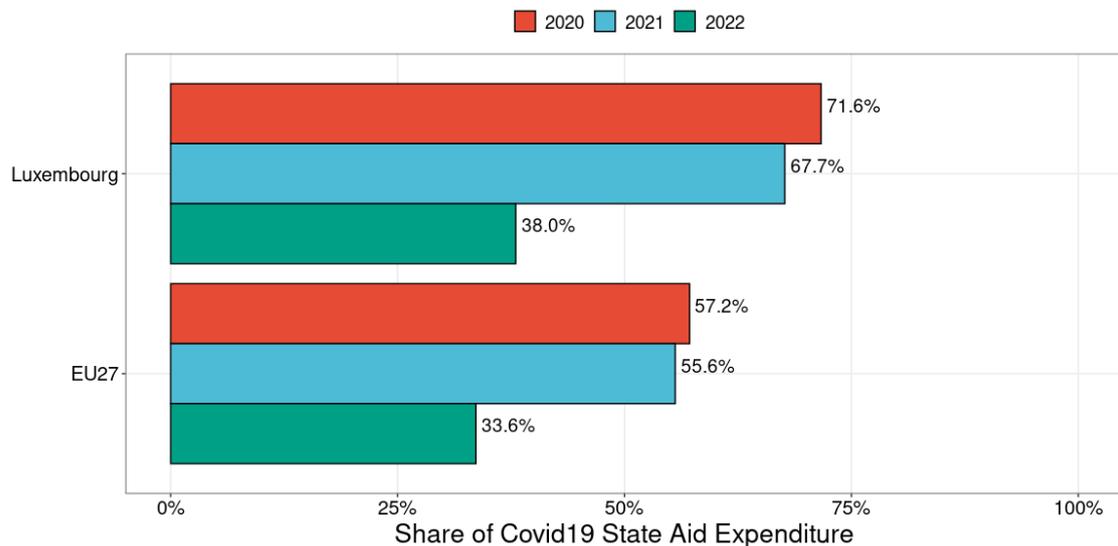
Figure 3.2: State aid expenditure for the main instruments.



18.4 State Aid Spending – Covid19

In 2022 the Covid19-related expenditure for Luxembourg amounted to EUR 196.1 million i.e., 38.0% of the total State aid expenditure. In 2020 this amounted to EUR 510.6 million, i.e., 71.6% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

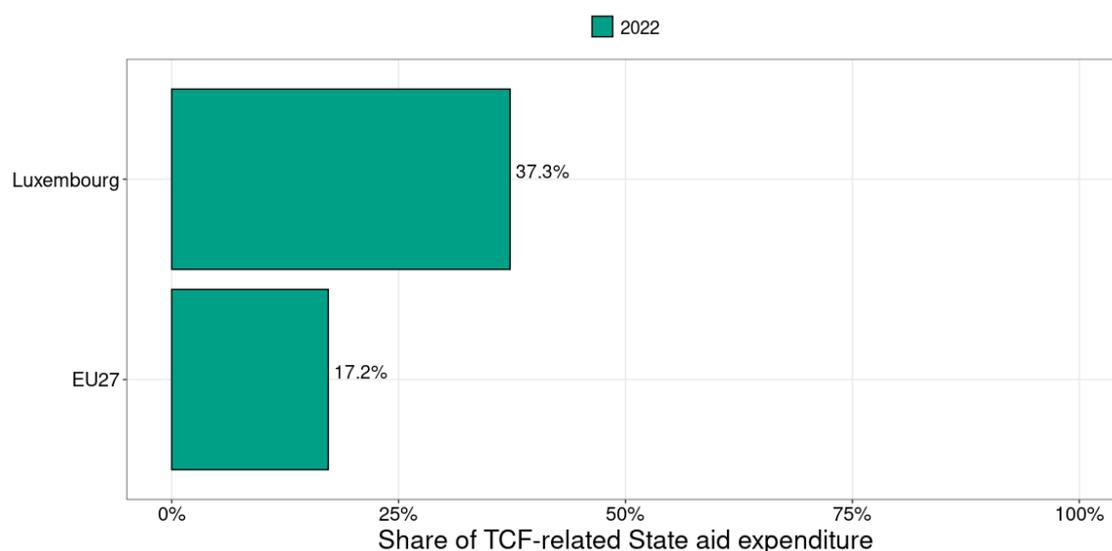


18.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Luxembourg amounted to EUR 192.3 million i.e., 37.3% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



19 Country Focus on Latvia in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

19.1 Case and Procedural Information

The total number of active measures corresponded to 86 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

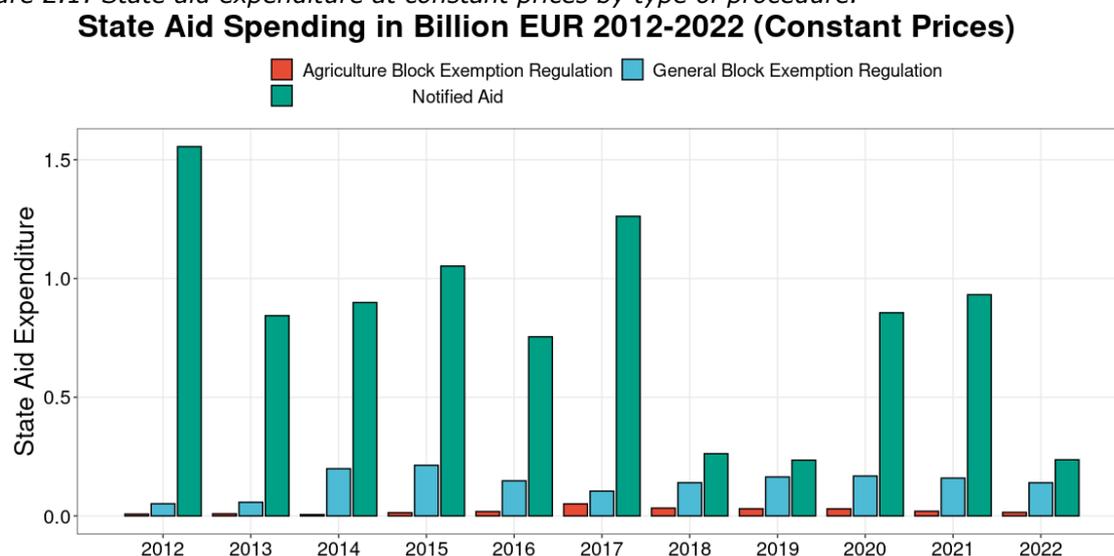
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	18	20.9%
Fisheries Block Exemption Regulation	2	2.3%
General Block Exemption Regulation	34	39.6%
Notified Aid	32	37.2%
Total	86	100.0%

In 2022, the number of GBER measures in Latvia reached 39.6% of the total number of measures, with 48.3% of all newly implemented measures falling under GBER.

19.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Latvia during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.



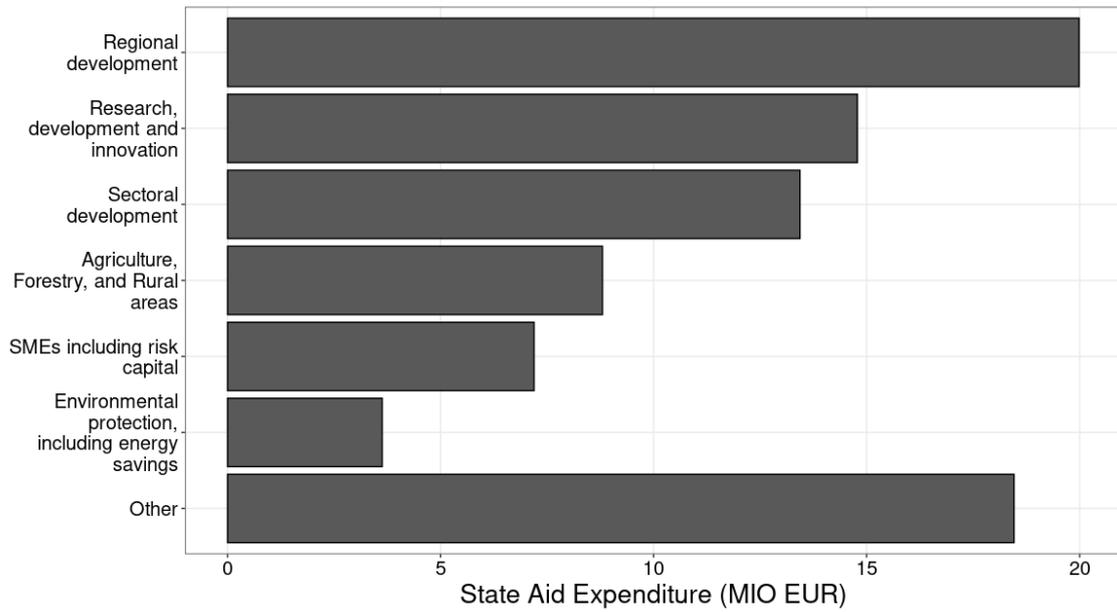
In 2022, the total State aid spending for Latvia amounted to EUR 0.4 million. The 5 biggest State aid measures in absorbed 48.5% of the total spending i.e., EUR 190.1million.

Finally, the amount of aid co-financed with EU funds in Latvia corresponded to EUR 86.3 million (around 22% of the total spending) and was mostly concentrated in Regional development (23.2%), Other (20.1%) and Research, development and innovation (17.1%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.

Top State Aid Objectives for Co-financed Aid in 2022



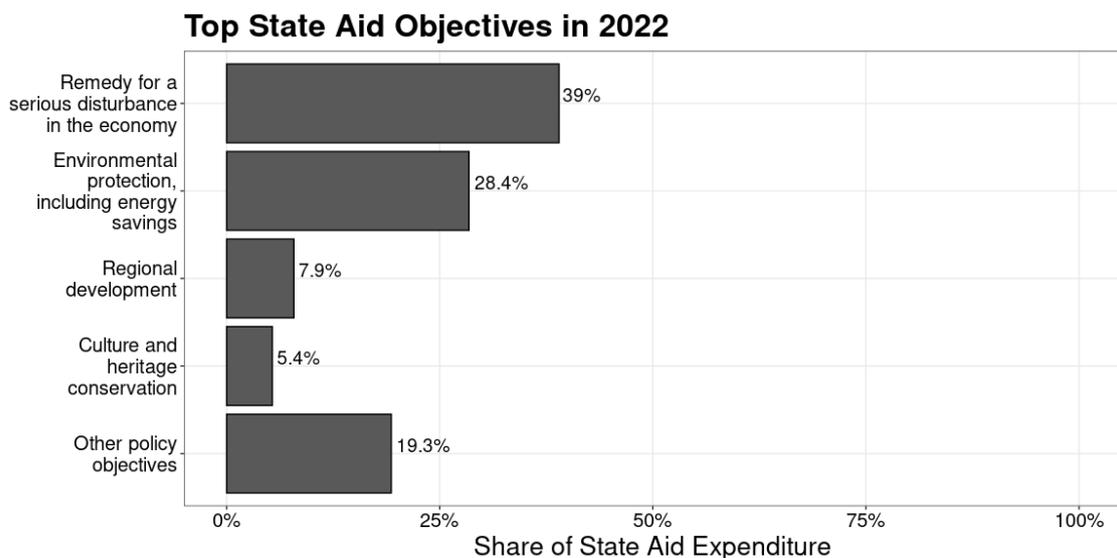
19.3 State Aid Spending – Top Objectives and Instruments

Around 67.4% of State aid spending in Latvia was concentrated in two main policy objectives. Around 39% was directed towards “Remedy for a serious disturbance in the economy” while 28.4% to “Environmental protection, including energy savings”.

Furthermore, Latvia devoted around 7.9% towards “Regional development” and 5.4% to “Culture and heritage conservation”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 67.3% of the total GBER spending, as illustrated in Table 3.1.

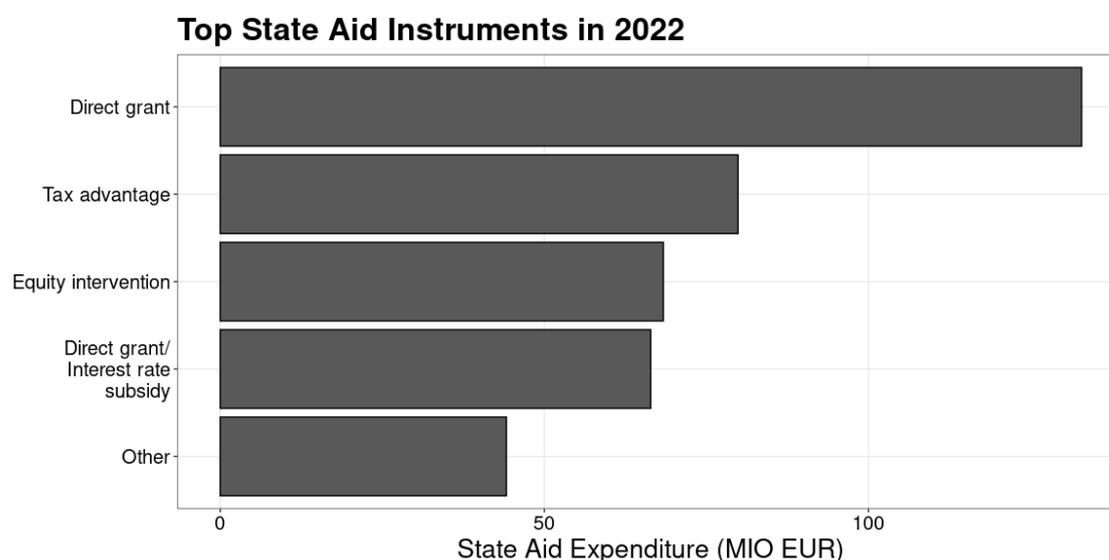
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	32.4%
Regional aid – investment aid (Art. 14) – Scheme	18.4%
Aid for sport and multifunctional recreational infrastructures (Art. 55)	8.9%
Investment aid for local infrastructures (Art. 56)	7.6%
Total top 4 GBER articles	67.3%

In terms of State aid instruments, Latvia privileged the use of “Direct grant” (around EUR 132.9 million, 33.9% of total State aid spending), followed by “Tax advantage” (EUR 79.9 million, 20.4% of total State aid spending), and “Equity intervention” (around EUR 68.3 million, 17.5% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

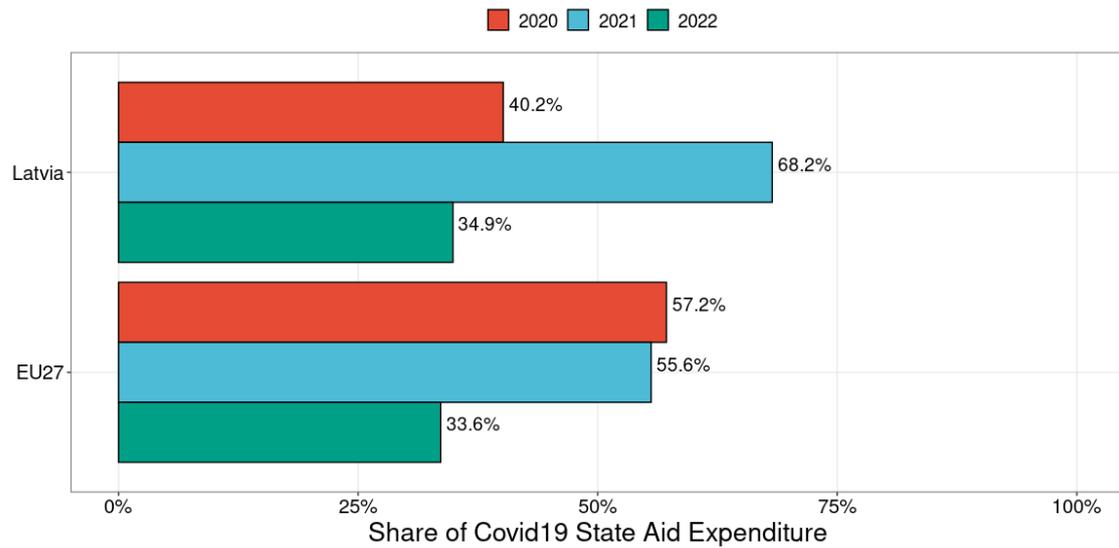
Figure 3.2: State aid expenditure for the main instruments.



19.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Latvia amounted to EUR 136.7 million i.e., 34.9% of the total State aid expenditure. In 2020 this amounted to EUR 326.8 million, i.e., 40.2% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

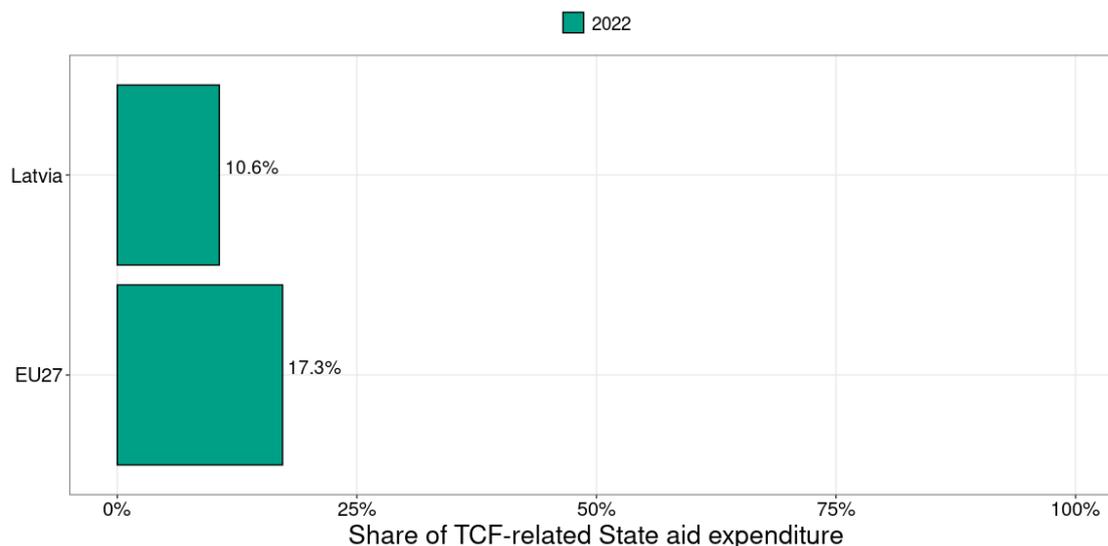


19.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Latvia amounted to EUR 41.7 million i.e., 10.6% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



20 Country Focus on Malta in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

20.1 Case and Procedural Information

The total number of active measures corresponded to 46 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
General Block Exemption Regulation	30	65.2%
Notified Aid	16	34.8%
Total	46	100.0%

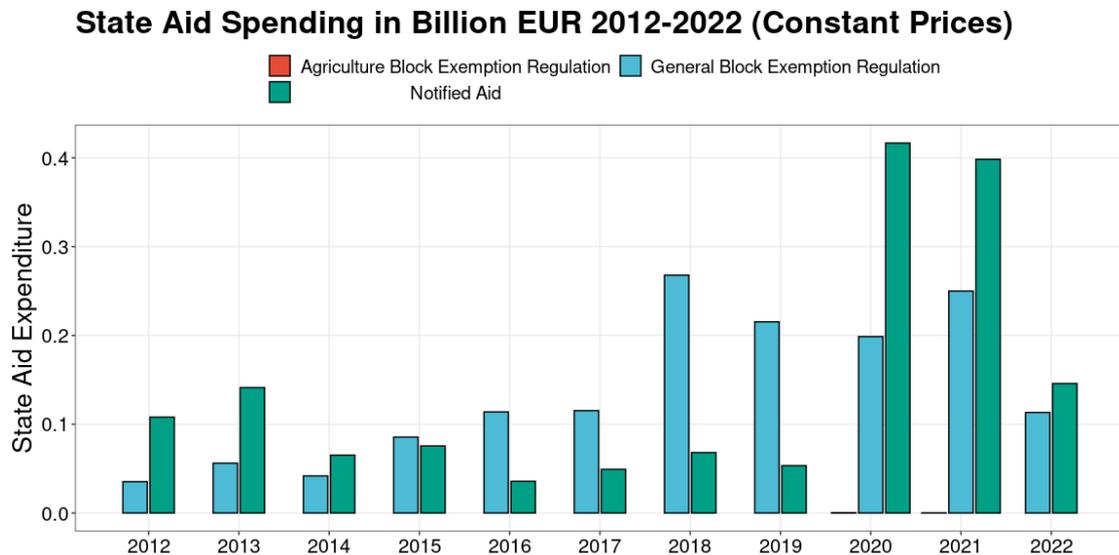
In 2022, the number of GBER measures in Malta reached 65.2% of the total number of measures, with 73.9% of all newly implemented measures falling under GBER.

20.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Malta during the period 2012-2022 in constant prices adjusted by the yearly value

of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

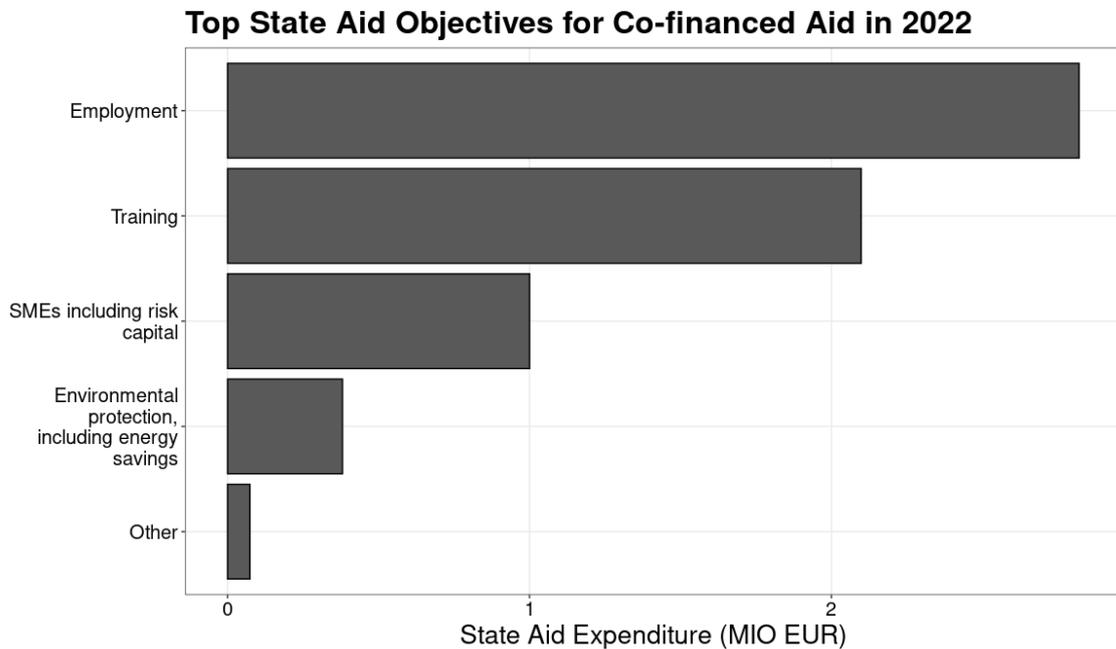


In 2022, the total State aid spending for Malta amounted to EUR 0.3 million. The 5 biggest State aid measures in absorbed 77.6% of the total spending i.e., EUR 201.1million.

Finally, the amount of aid co-financed with EU funds in Malta corresponded to EUR 6.4 million (around 2.5% of the total spending) and was mostly concentrated in Employment (44.2%), Training (32.9%) and SMEs including risk capital (15.7%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



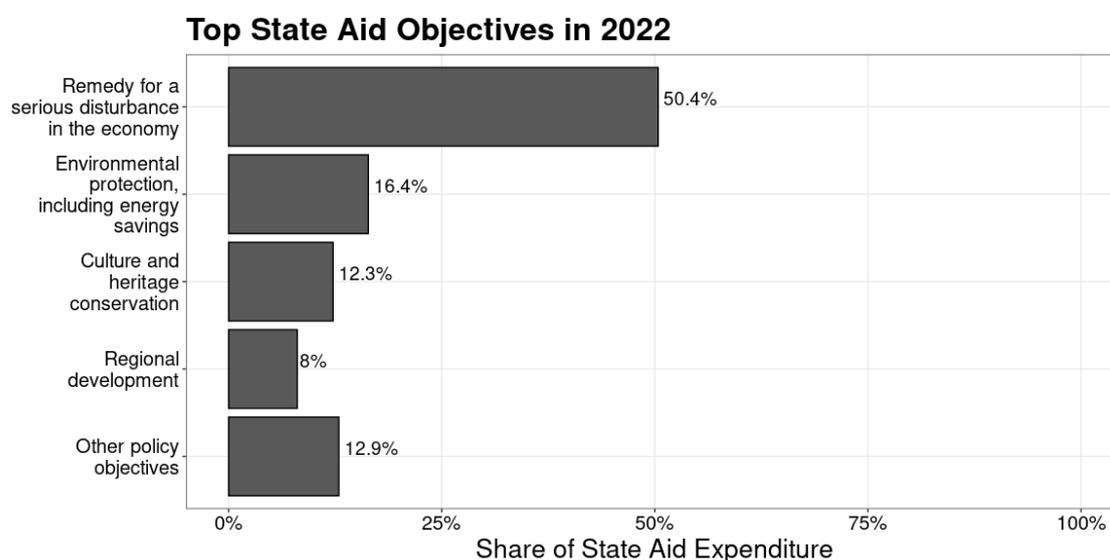
20.3 State Aid Spending – Top Objectives and Instruments

Around 66.8% of State aid spending in Malta was concentrated in two main policy objectives. Around 50.4% was directed towards “Remedy for a serious disturbance in the economy” while 16.4% to “Environmental protection, including energy savings”.

Furthermore, Malta devoted around 12.3% towards “Culture and heritage conservation” and 8% to “Regional development”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 83% of the total GBER spending, as illustrated in Table 3.1.

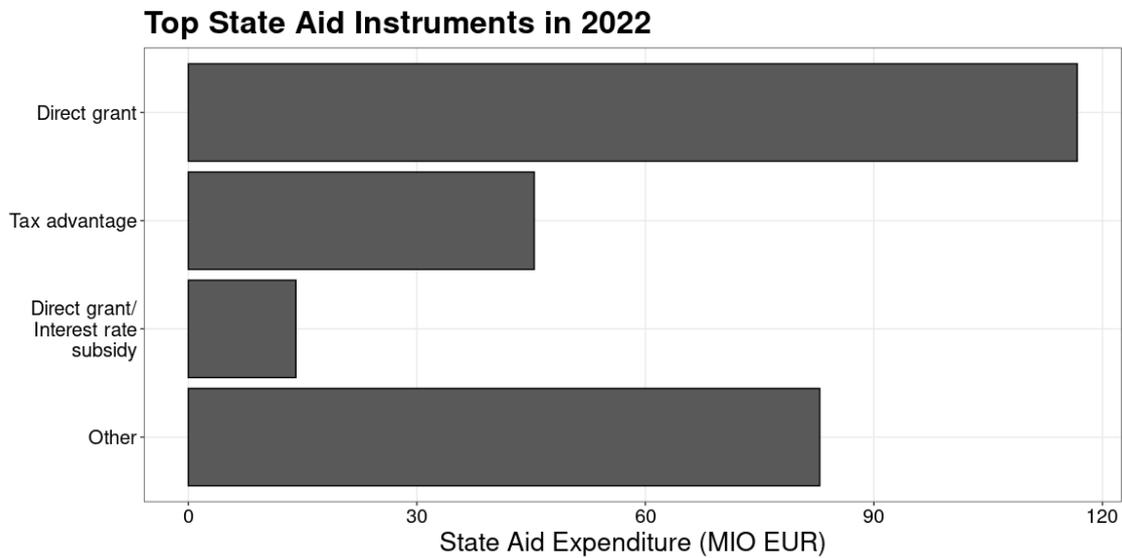
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Operating aid for the promotion of electricity from renewable sources (Art. 42)	36.9%
Aid schemes for audio-visual works (Art. 54)	27.7%
Regional aid – investment aid (Art. 14) – Scheme	11.0%
Regional aid Scheme	7.4%
Total top 4 GBER articles	83.0%

In terms of State aid instruments, Malta privileged the use of “Direct grant” (around EUR 116.7 million, 45% of total State aid spending), followed by “Other” (EUR 80.6 million, 31.1% of total State aid spending), and “Tax advantage” (around EUR 45.4 million, 17.5% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

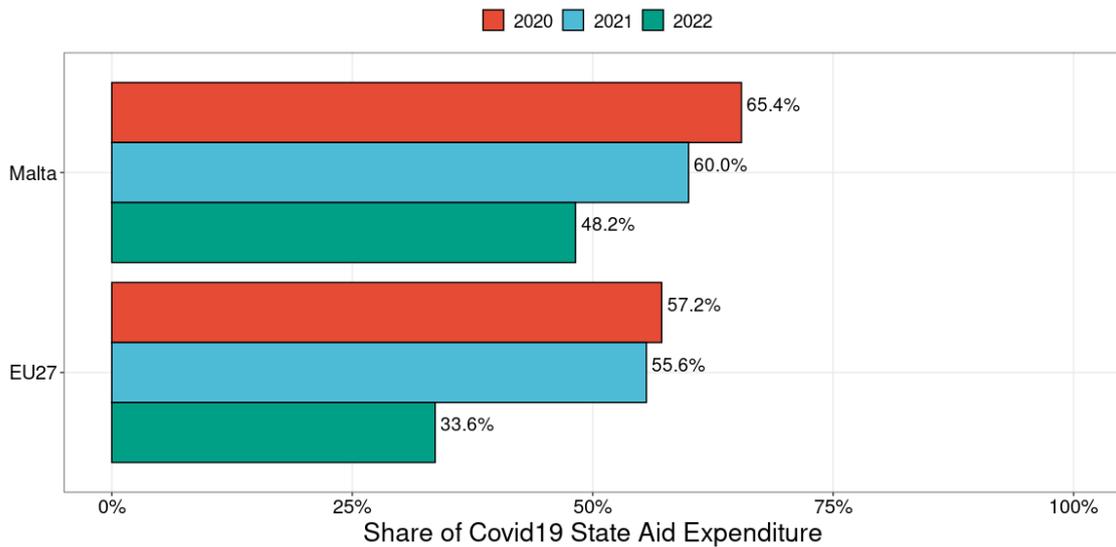
Figure 3.2: State aid expenditure for the main instruments.



20.4 State Aid Spending – Covid19

In 2022 the Covid19-related expenditure for Malta amounted to EUR 124.9 million i.e., 48.2% of the total State aid expenditure. In 2020 this amounted to EUR 370.8 million, i.e., 65.4% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

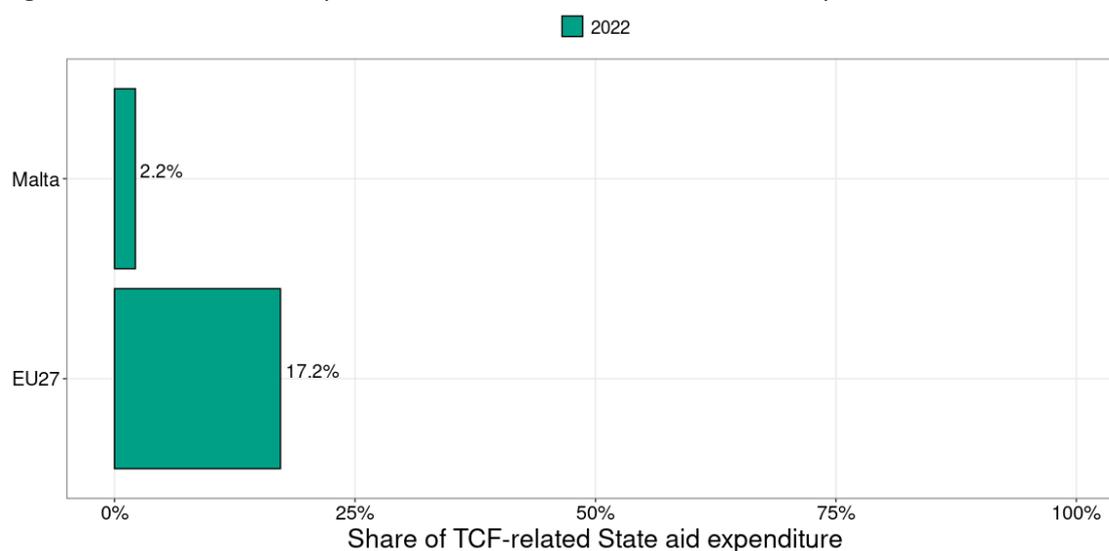


20.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Malta amounted to EUR 5.6 million i.e., 2.2% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



21 Country Focus on Netherlands in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

21.1 Case and Procedural Information

The total number of active measures corresponded to 1043 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	142	13.6%
General Block Exemption Regulation	851	81.6%
Notified Aid	50	4.8%
Total	1,043	100.0%

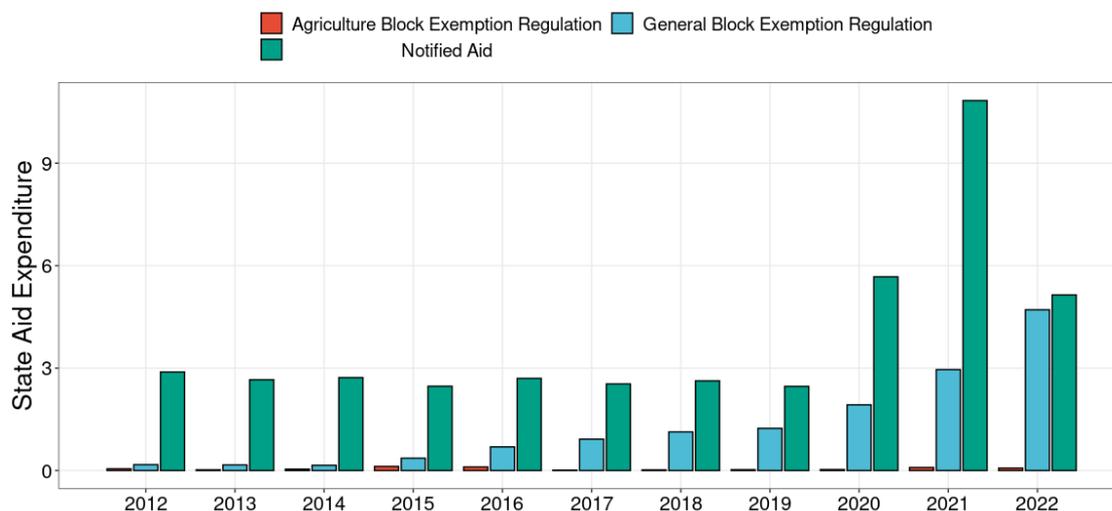
In 2022, the number of GBER measures in Netherlands reached 81.6% of the total number of measures, with 80% of all newly implemented measured falling under GBER.

21.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Netherlands during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

State Aid Spending in Billion EUR 2012-2022 (Constant Prices)

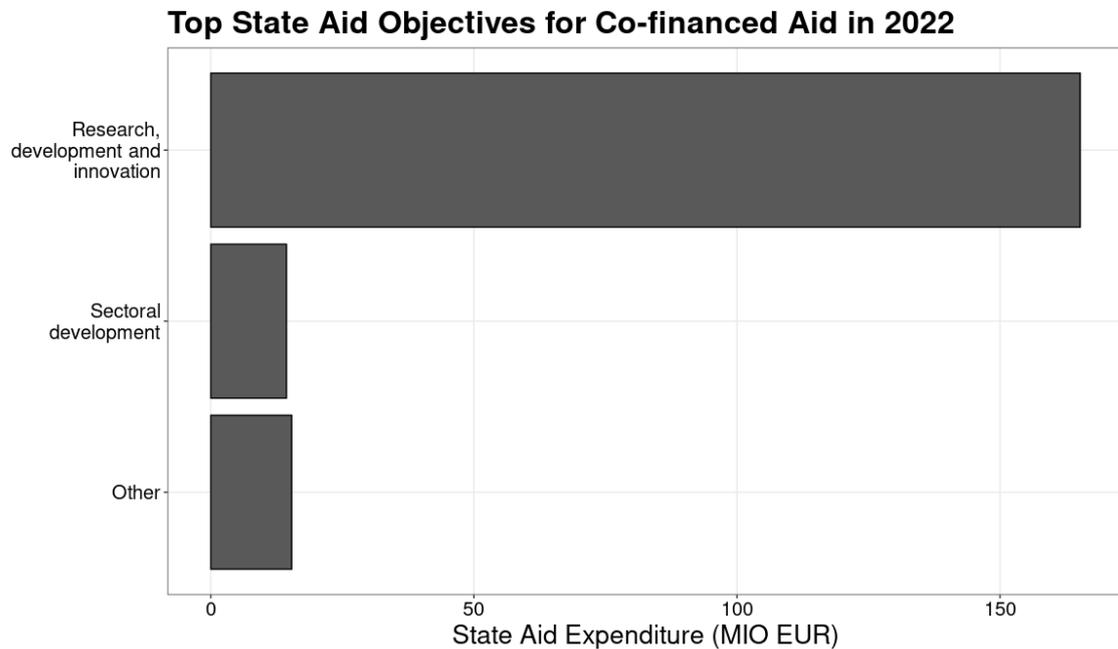


In 2022, the total State aid spending for Netherlands amounted to EUR 9.9 billion. The 5 biggest State aid measures absorbed 50.3% of the total spending i.e., EUR 5 billion.

Finally, the amount of aid co-financed with EU funds in Netherlands corresponded to EUR 195 million (around 2% of the total spending) and was mostly concentrated in Research, development and innovation (84.8%), Sectoral development (7.4%) and Other (2.4%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



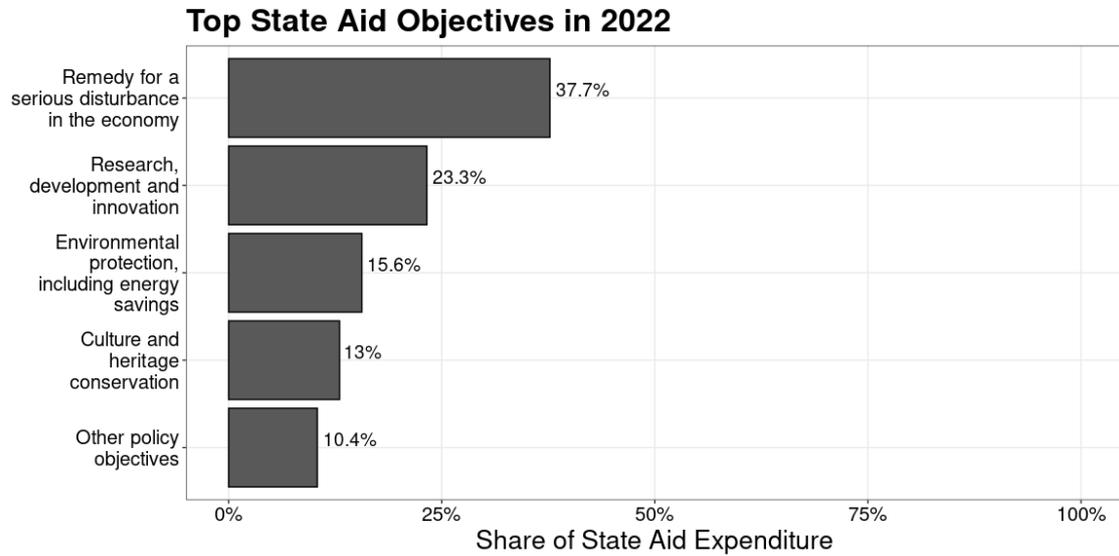
21.3 State Aid Spending - Top Objectives and Instruments

Around 61% of State aid spending in Netherlands was concentrated in two main policy objectives. Around 37.7% was directed towards “Remedy for a serious disturbance in the economy” while 23.3% to “Research, development and innovation”.

Furthermore, Netherlands devoted around 15.6% towards “Environmental protection, including energy savings” and 13% to “Culture and heritage conservation”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 76.6% of the total GBER spending, as illustrated in Table 3.1.

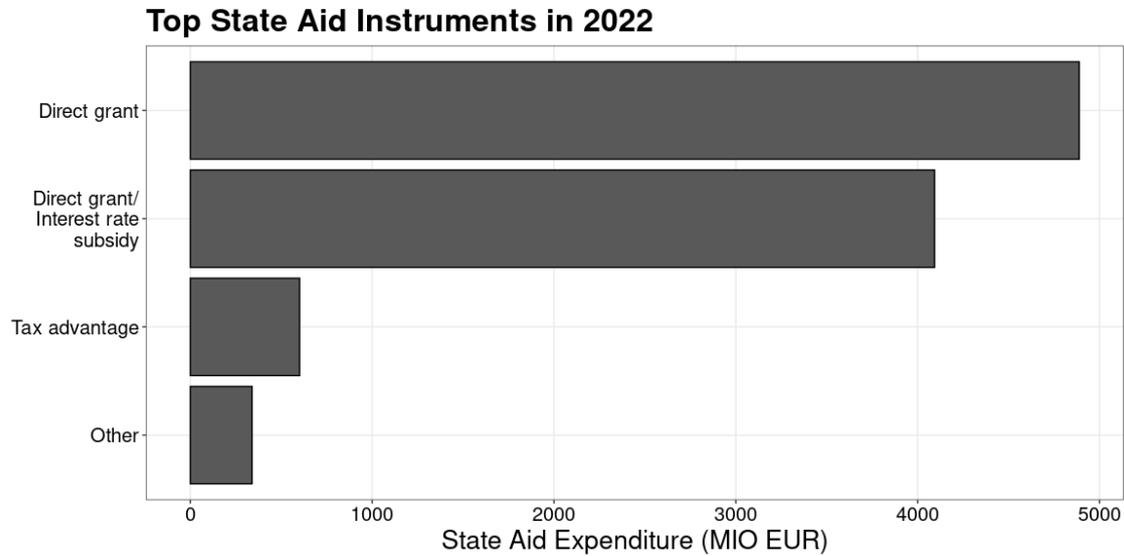
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Feasibility studies (Art. 25(2)(d))	33.7%
Aid for culture and heritage conservation (Art. 53)	26.7%
Investment aid enabling undertakings to go beyond Union standards for environmental protection or increase the level of environmental protection in the absence of Union standards (Art.36)	9.2%
Experimental development (Art. 25(2)(c))	7.0%
Total top 4 GBER articles	76.6%

In terms of State aid instruments, Netherlands privileged the use of “Direct grant” (around EUR 4.9 billion, 49.3% of total State aid spending), followed by “Direct grant/ Interest rate subsidy” (EUR 4.1 billion, 41.2% of total State aid spending), and “Tax advantage” (around EUR 600.8 million, 6.1% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

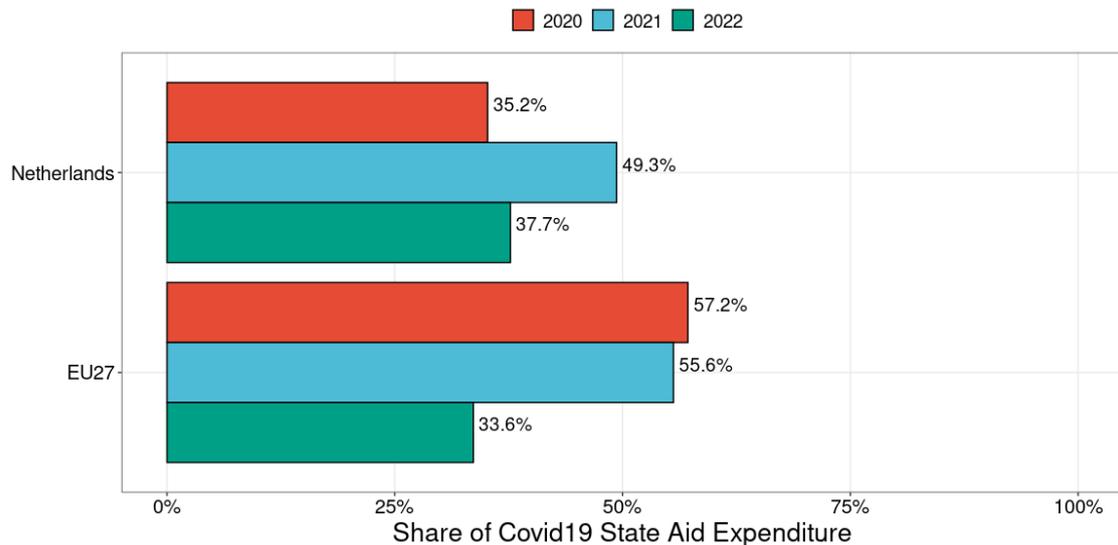
Figure 3.2: State aid expenditure for the main instruments.



21.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Netherlands amounted to EUR 3.7 billion i.e., 37.7% of the total State aid expenditure. In 2020 this amounted to EUR 2.5 billion, i.e., 35.2% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

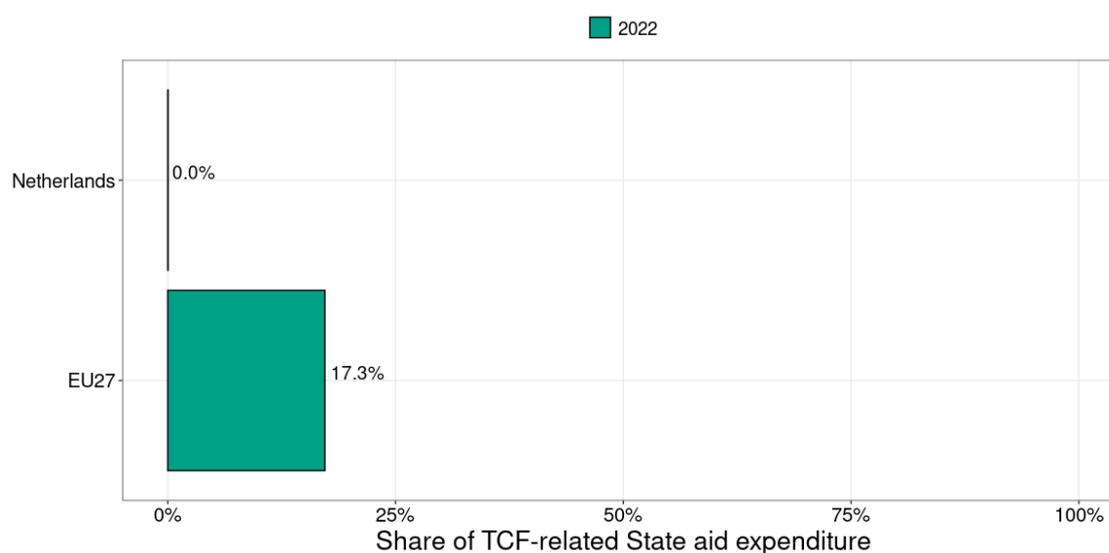


21.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Netherlands amounted to EUR 3.5 million i.e., 0.0% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



22 Country Focus on Poland in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

22.1 Case and Procedural Information

The total number of active measures corresponded to 191 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

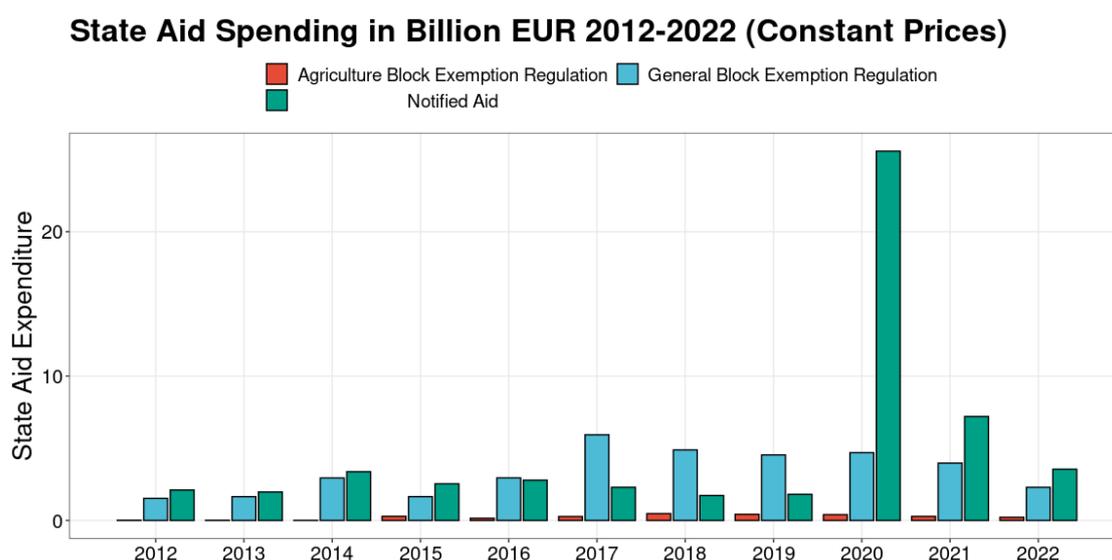
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	16	8.4%
Fisheries Block Exemption Regulation	1	0.5%
General Block Exemption Regulation	110	57.6%
Notified Aid	64	33.5%
Total	191	100.0%

In 2022, the number of GBER measures in Poland reached 57.6% of the total number of measures, with 75.3% of all newly implemented measured falling under GBER.

22.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Poland during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

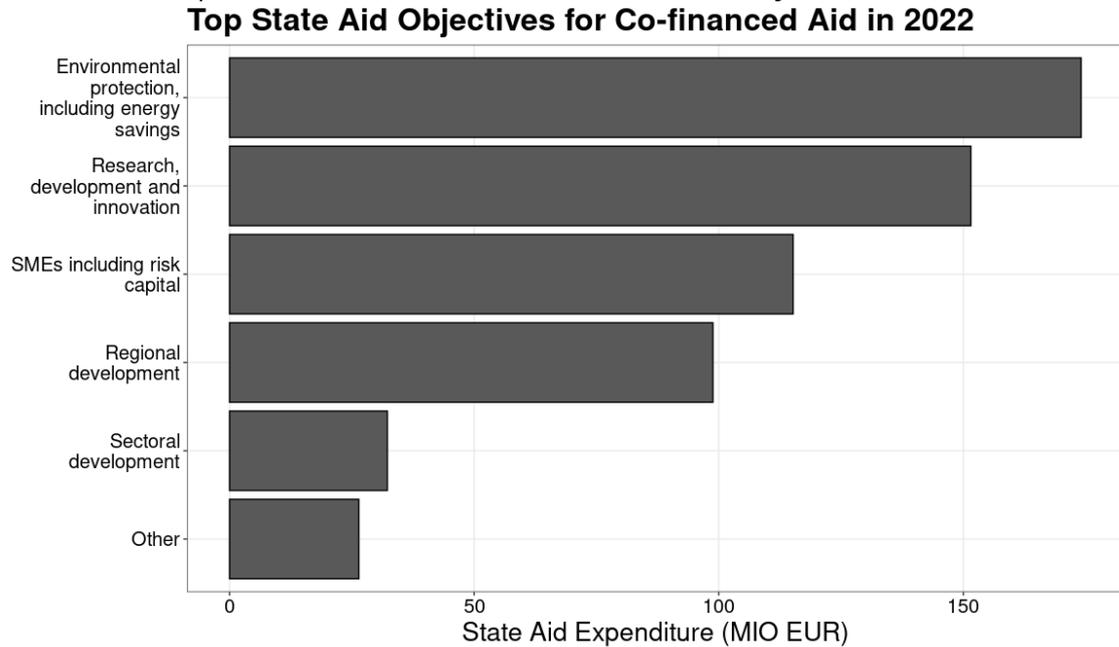


In 2022, the total State aid spending for Poland amounted to EUR 6.1 million. The 5 biggest State aid measures in absorbed 51.2% of the total spending i.e., EUR 3.1billion.

Finally, the amount of aid co-financed with EU funds in Poland corresponded to EUR 598.3 million (around 9.9% of the total spending) and was mostly concentrated in Environmental protection, including energy savings (29.1%), Research, development and innovation (25.3%) and SMEs including risk capital (19.3%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



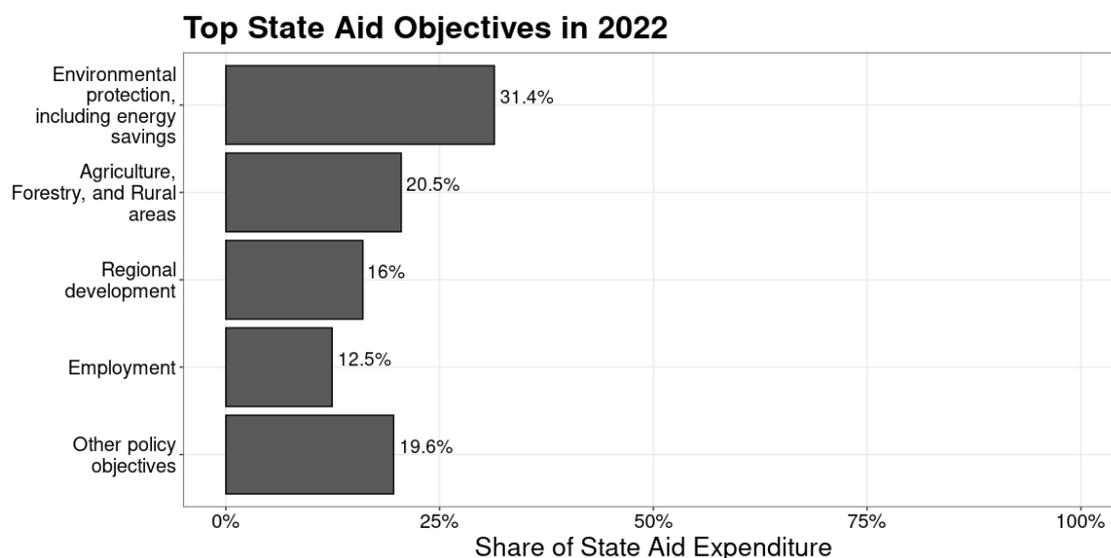
22.3 State Aid Spending - Top Objectives and Instruments

Around 51.9% of State aid spending in Poland was concentrated in two main policy objectives. Around 31.4% was directed towards “Environmental protection, including energy savings” while 20.5% to “Agriculture, Forestry, and Rural areas”.

Furthermore, Poland devoted around 16% towards “Regional development” and 12.5% to “Employment”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



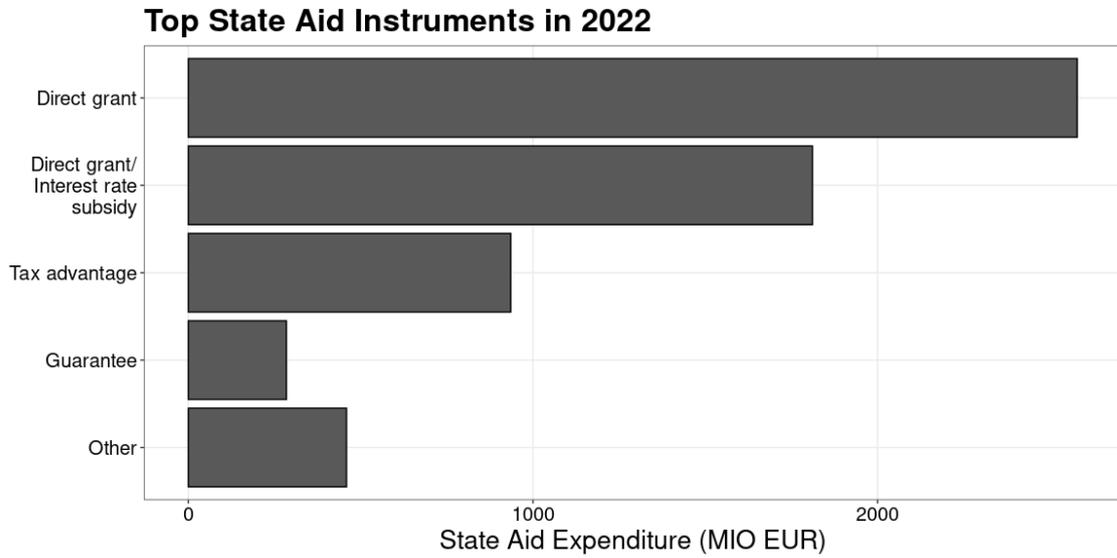
As to GBER, the top 4 key articles absorbed about 68.5% of the total GBER spending, as illustrated in Table 3.1. Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid for the employment of workers with disabilities in the form of wage subsidies (Article 33)	28.3%
Regional aid – investment aid (Art. 14) – Scheme	18.4%
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	11.6%
Regional aid Scheme	10.2%
Total top 4 GBER articles	68.5%

In terms of State aid instruments, Poland privileged the use of “Direct grant” (around EUR 2.6 billion, 42.5% of total State aid spending), followed by “Direct grant/ Interest rate subsidy” (EUR 1.8 billion, 29.8% of total State aid spending), and “Tax advantage” (around EUR 935.5 million, 15.4% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

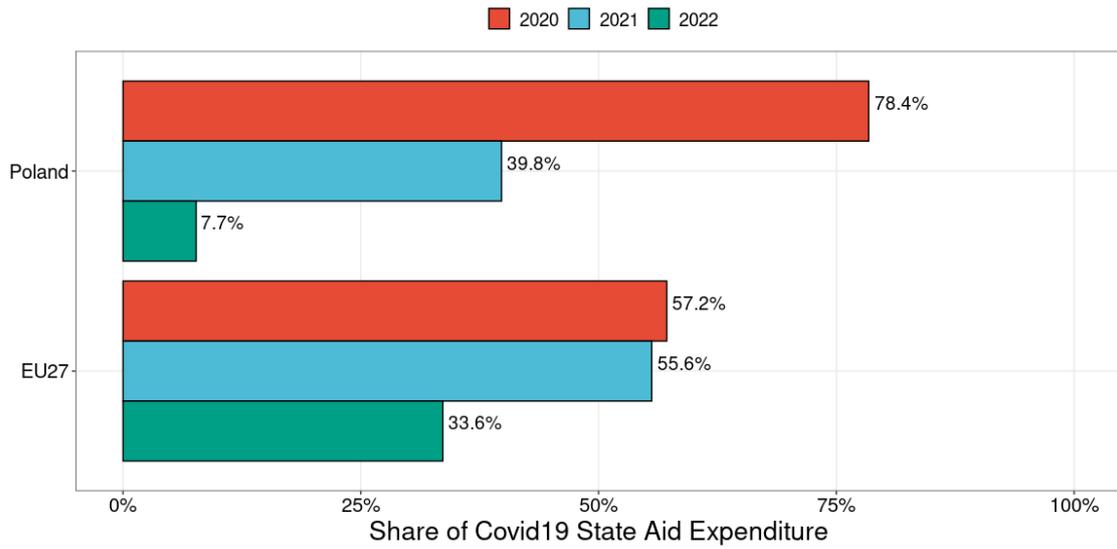
Figure 3.2: State aid expenditure for the main instruments.



22.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Poland amounted to EUR 467 million i.e., 7.7% of the total State aid expenditure. In 2020 this amounted to EUR 21.3 billion, i.e., 78.4% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

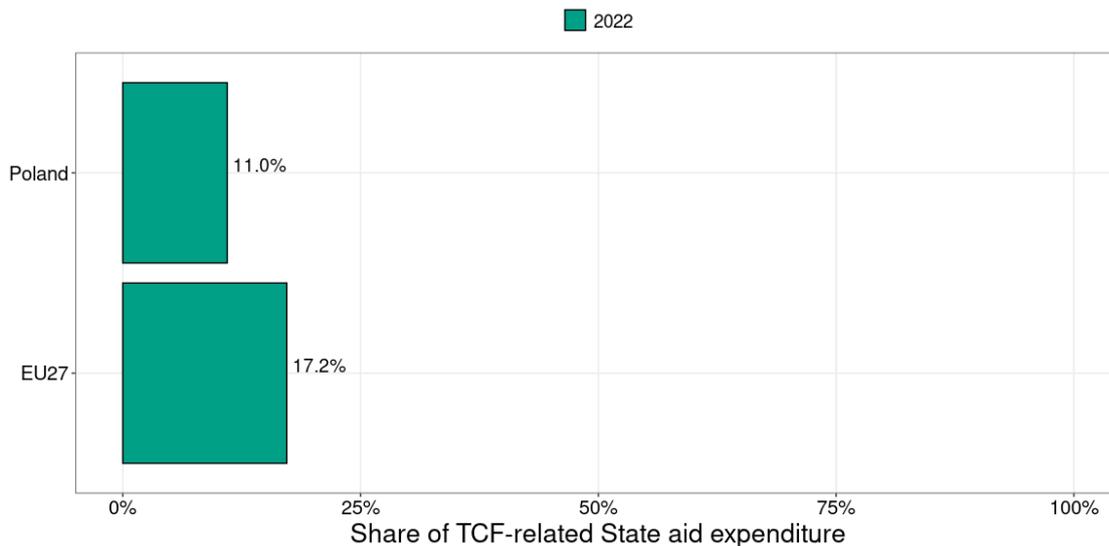


22.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Poland amounted to EUR 666.8 million i.e., 11.0% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



23 Country Focus on Portugal in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

23.1 Case and Procedural Information

The total number of active measures corresponded to 126 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

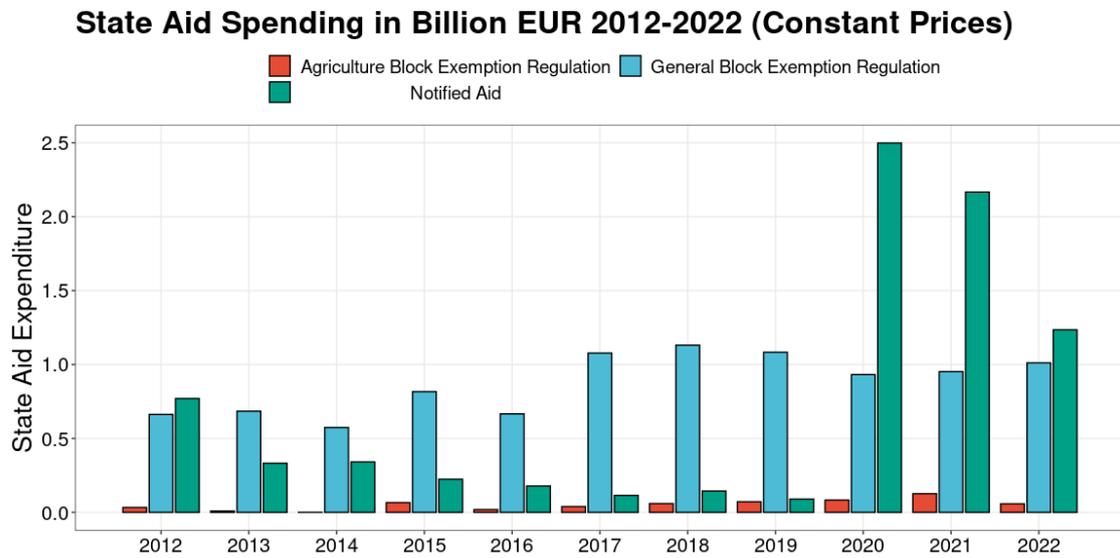
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	26	20.7%
General Block Exemption Regulation	58	46.0%
Notified Aid	42	33.3%
Total	126	100.0%

In 2022, the number of GBER measures in Portugal reached 46.0% of the total number of measures, with 37% of all newly implemented measures falling under GBER.

23.2 State Aid Spending – Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Portugal during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

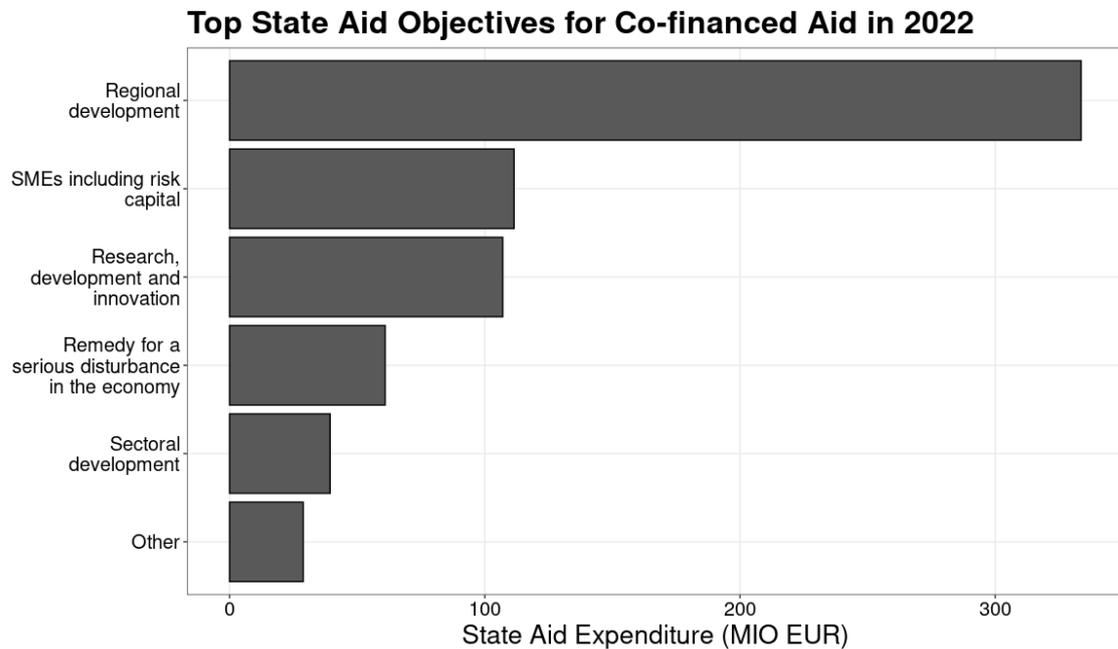


In 2022, the total State aid spending for Portugal amounted to EUR 2.3 billion. The 5 biggest State aid measures absorbed 55.9% of the total spending i.e., EUR 1.3 billion.

Finally, the amount of aid co-financed with EU funds in Portugal corresponded to EUR 681.4 million (around 29.6% of the total spending) and was mostly concentrated in Regional development (49%), SMEs including risk capital (16.4%) and Research, development and innovation (15.7%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



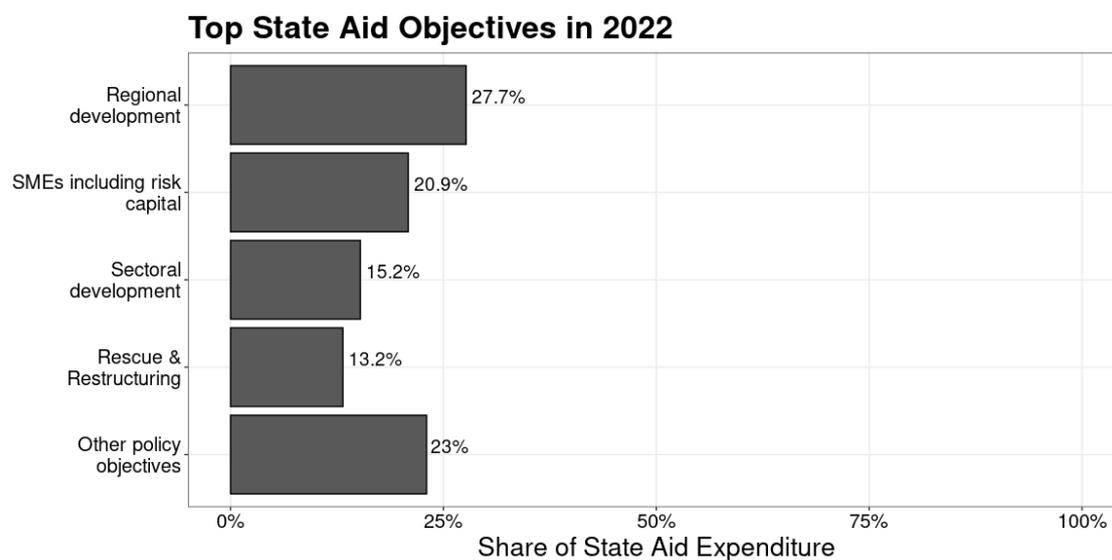
23.3 State Aid Spending - Top Objectives and Instruments

Around 48.6% of State aid spending in Portugal was concentrated in two main policy objectives. Around 27.7% was directed towards “Regional development” while 20.9% to “SMEs including risk capital”.

Furthermore, Portugal devoted around 15.2% towards “Sectoral development” and 13.2% to “Rescue & Restructuring”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 78.1% of the total GBER spending, as illustrated in Table 3.1.

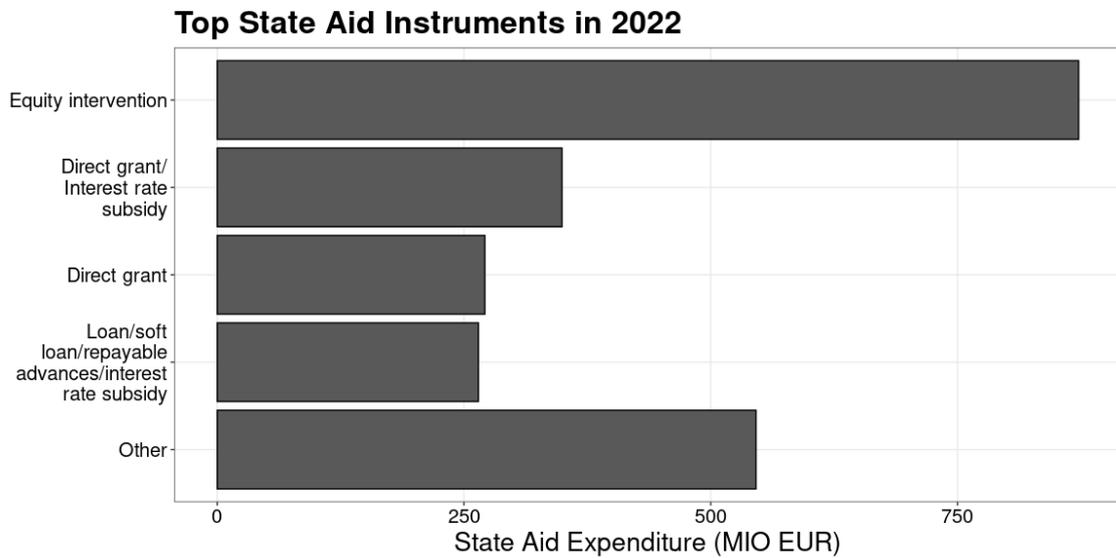
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Regional aid - investment aid (Art. 14) - Scheme	54.9%
Investment aid to SMEs (Art. 17)	12.2%
Industrial research (Art. 25(2)(b))	5.6%
Risk finance aid (Art. 21)	5.4%
Total top 4 GBER articles	78.1%

In terms of State aid instruments, Portugal privileged the use of "Equity intervention" (around EUR 872.7 million, 37.9% of total State aid spending), followed by "Other" (EUR 396.8 million, 17.2% of total State aid spending), and "Direct grant/ Interest rate subsidy" (around EUR 349.3 million, 15.2% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

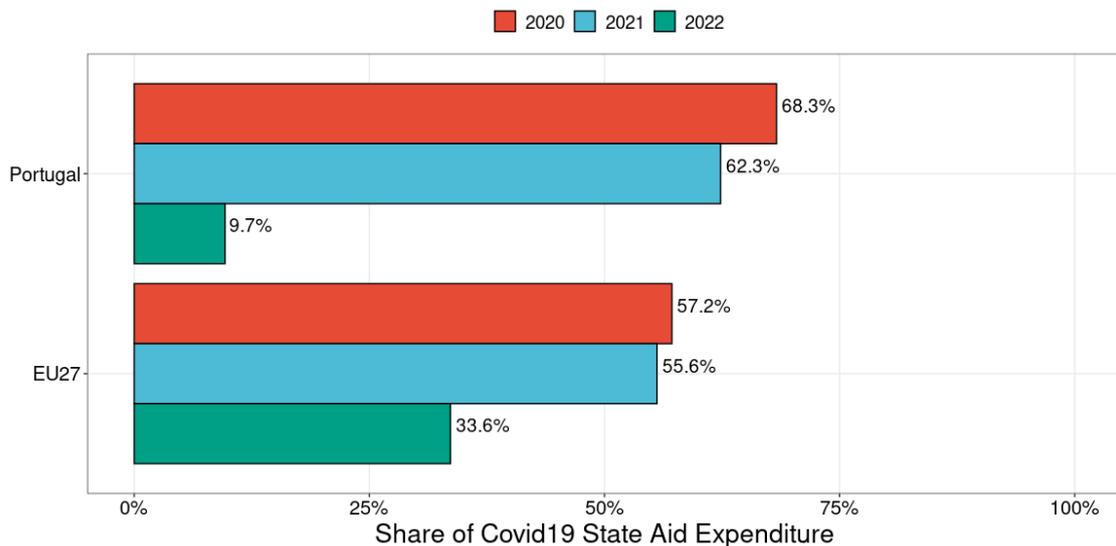
Figure 3.2: State aid expenditure for the main instruments.



23.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Portugal amounted to EUR 222.5 million i.e., 9.7% of the total State aid expenditure. In 2020 this amounted to EUR 2.2 billion, i.e., 68.3% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

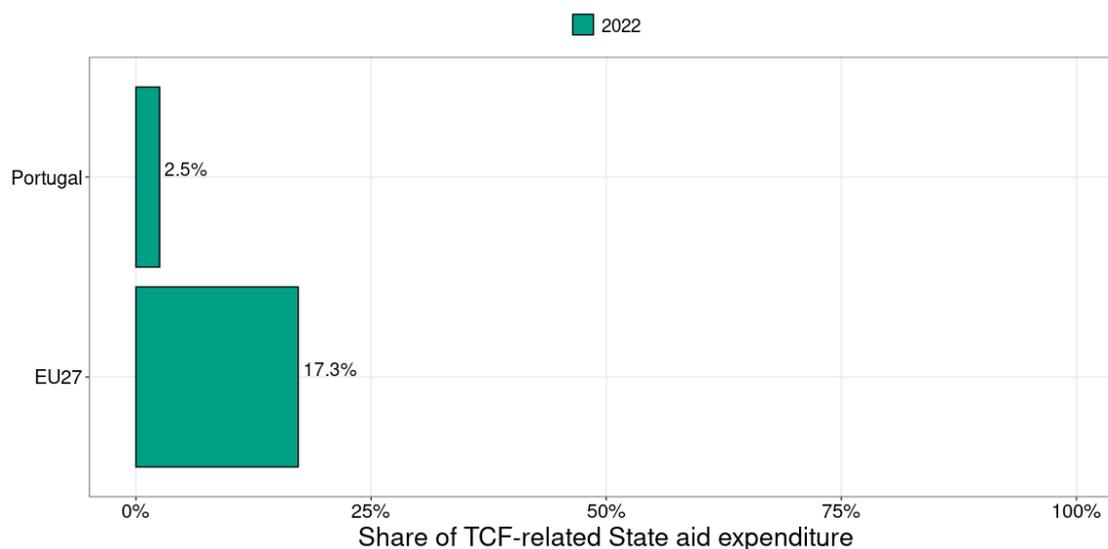


23.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Portugal amounted to EUR 58 million i.e., 2.5% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



24 Country Focus on Romania in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

24.1 Case and Procedural Information

The total number of active measures corresponded to 69 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

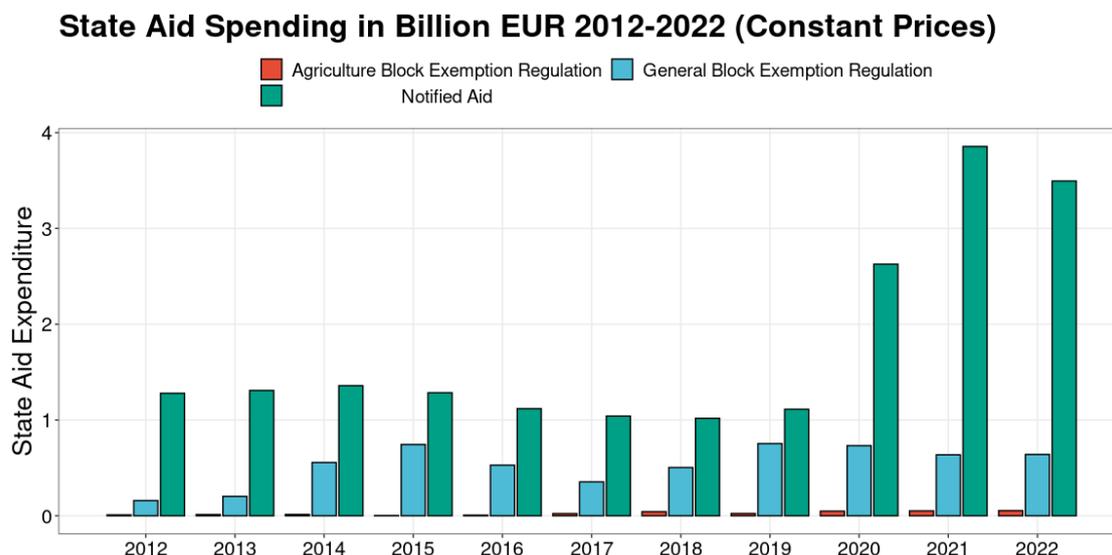
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	4	5.8%
General Block Exemption Regulation	36	52.2%
Notified Aid	29	42.0%
Total	69	100.0%

In 2022, the number of GBER measures in Romania reached 52.2% of the total number of measures, with 33.3% of all newly implemented measured falling under GBER.

24.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Romania during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

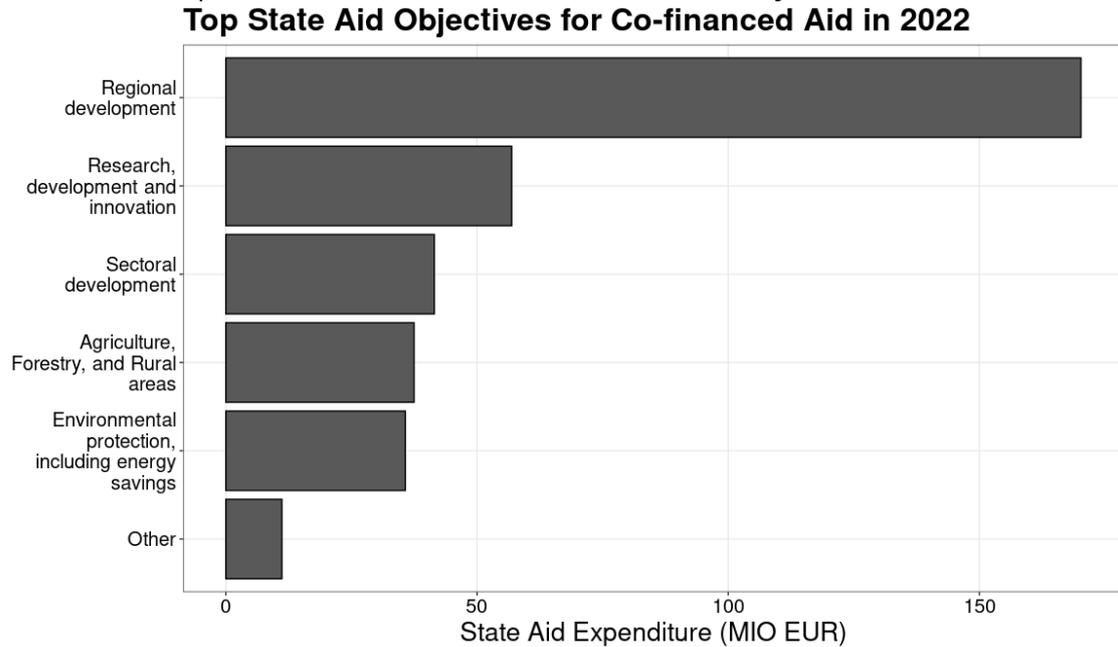


In 2022, the total State aid spending for Romania amounted to EUR 4.2 billion. The 5 biggest State aid measures absorbed 55.9% of the total spending i.e., EUR 2.3 billion.

Finally, the amount of aid co-financed with EU funds in Romania corresponded to EUR 353 million (around 8.4% of the total spending) and was mostly concentrated in Regional development (48.2%), Research, development and innovation (16.1%) and Sectoral development (11.8%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



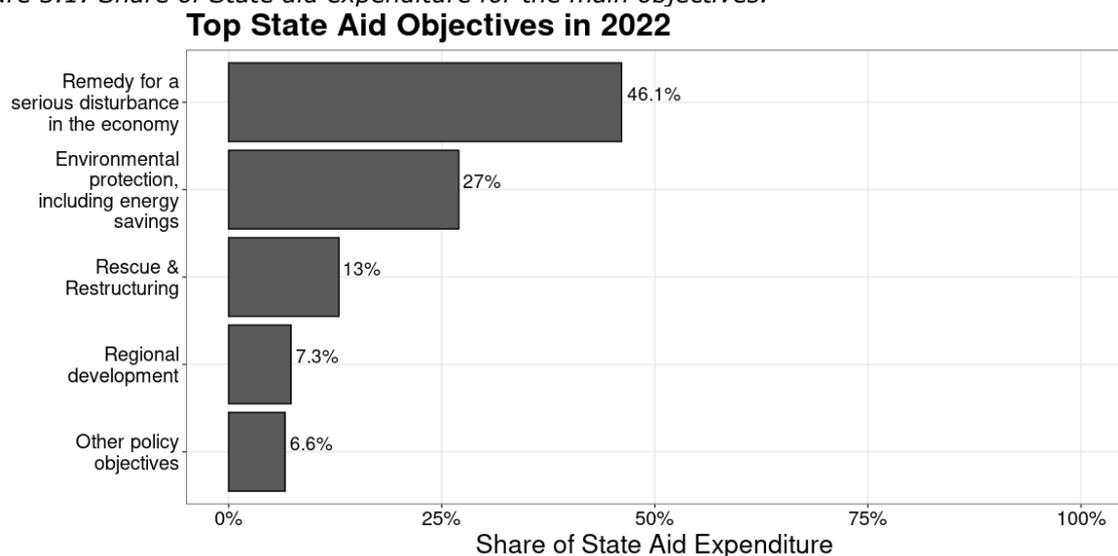
24.3 State Aid Spending - Top Objectives and Instruments

Around 73.1% of State aid spending in Romania was concentrated in two main policy objectives. Around 46.1% was directed towards “Remedy for a serious disturbance in the economy” while 27% to “Environmental protection, including energy savings”.

Furthermore, Romania devoted around 13% towards “Rescue & Restructuring” and 7.3% to “Regional development”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 82% of the total GBER spending, as illustrated in Table 3.1.

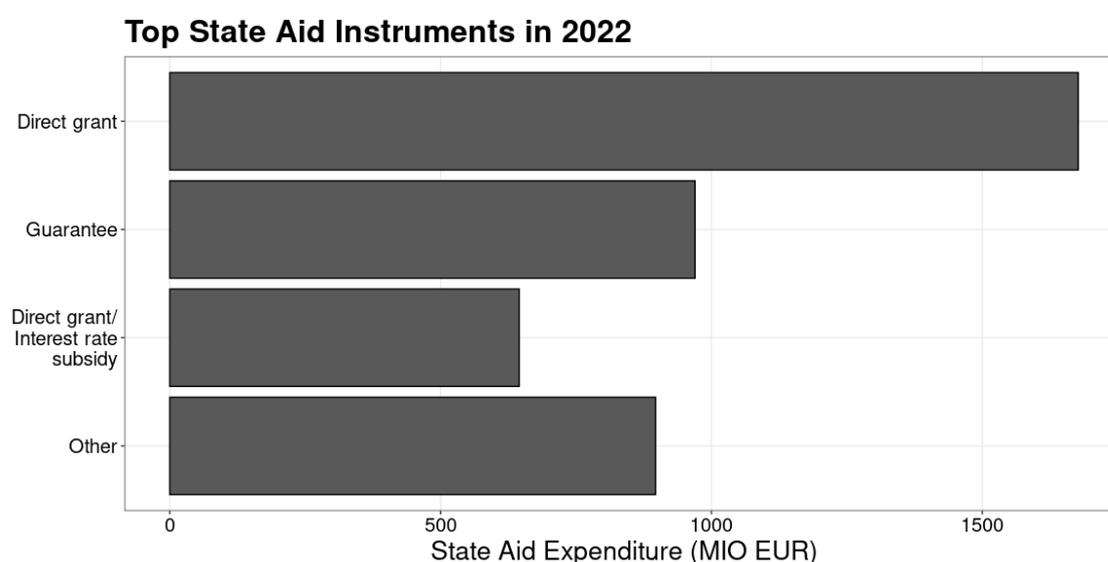
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Regional aid - investment aid (Art. 14) - Scheme	46.7%
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	23.8%
Industrial research (Art. 25(2)(b))	7.3%
Investment aid for regional airports (Art. 56a)	4.2%
Total top 4 GBER articles	82.0%

In terms of State aid instruments, Romania privileged the use of "Direct grant" (around EUR 1.7 billion, 40% of total State aid spending), followed by "Guarantee" (EUR 969.8 million, 23.1% of total State aid spending), and "Other" (around EUR 736.6 million, 17.6% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

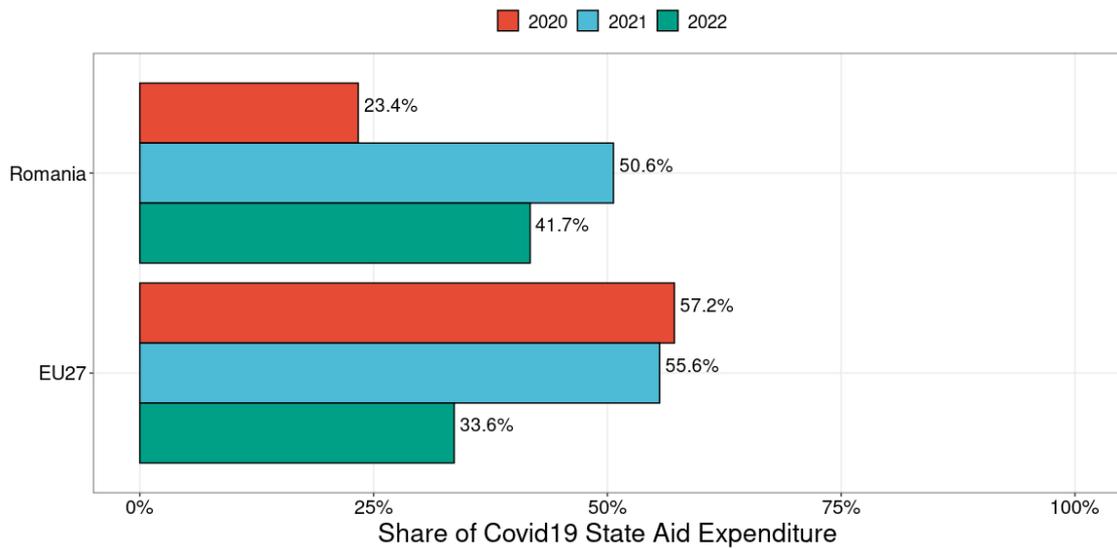
Figure 3.2: State aid expenditure for the main instruments.



24.4 State Aid Spending – Covid19

In 2022 the Covid19-related expenditure for Romania amounted to EUR 1.7 billion i.e., 41.7% of the total State aid expenditure. In 2020 this amounted to EUR 637.5 million, i.e., 23.4% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

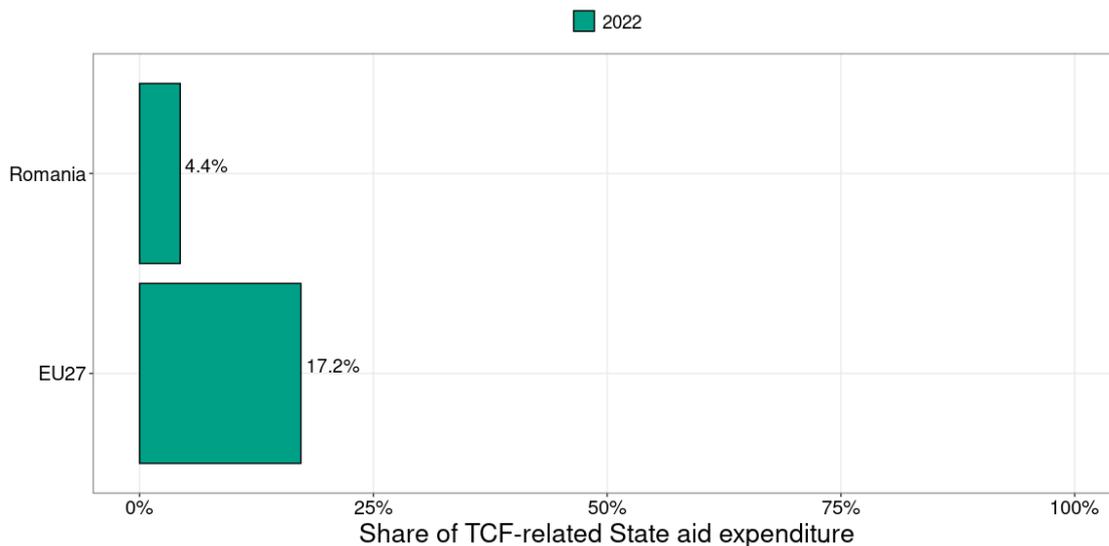


24.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Romania amounted to EUR 182.3 million i.e., 4.4% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



25 Country Focus on Slovakia in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

25.1 Case and Procedural Information

The total number of active measures corresponded to 94 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

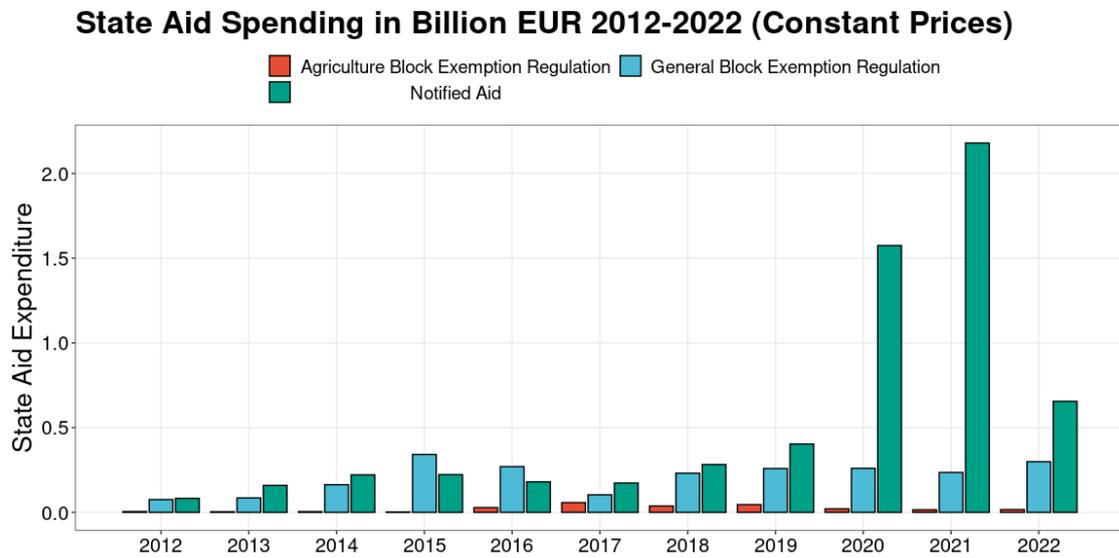
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	11	11.7%
General Block Exemption Regulation	53	56.4%
Notified Aid	30	31.9%
Total	94	100.0%

In 2022, the number of GBER measures in Slovakia reached 56.4% of the total number of measures, with 54.5% of all newly implemented measures falling under GBER.

25.2 State Aid Spending – Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Slovakia during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

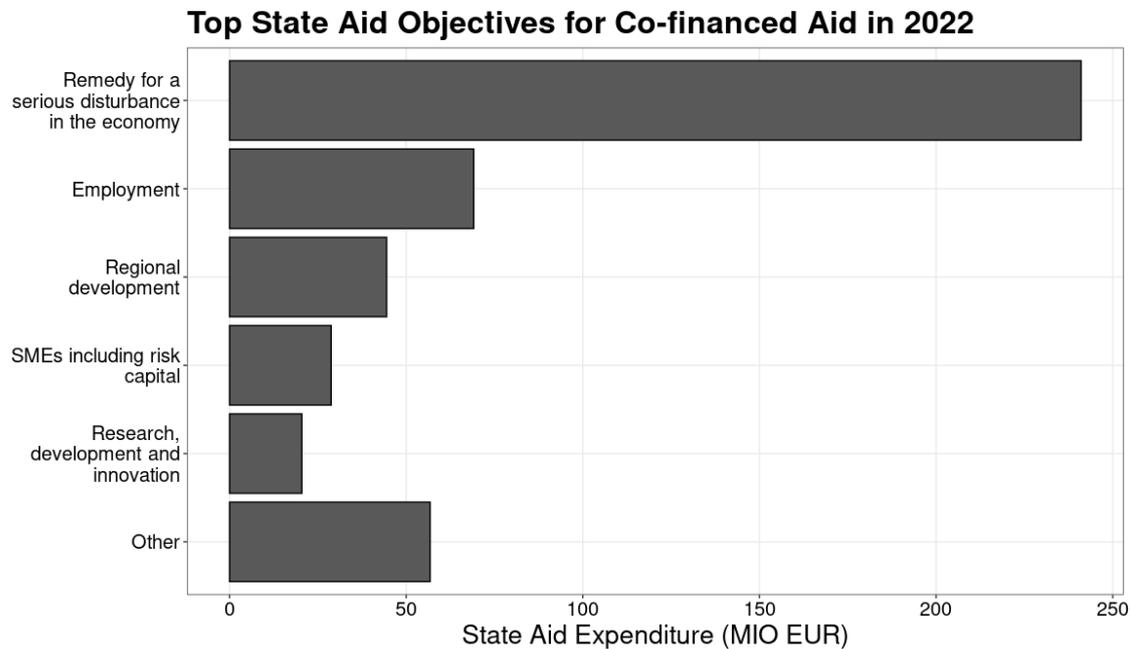


In 2022, the total State aid spending for Slovakia amounted to EUR 1 billion. The 5 biggest State aid measures absorbed 50.9% of the total spending i.e., EUR 493.7 million.

Finally, the amount of aid co-financed with EU funds in Slovakia corresponded to EUR 460.6 million (around 47.5% of the total spending) and was mostly concentrated in Remedy for a serious disturbance in the economy (52.3%), Employment (15%) and regional development (9.7%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



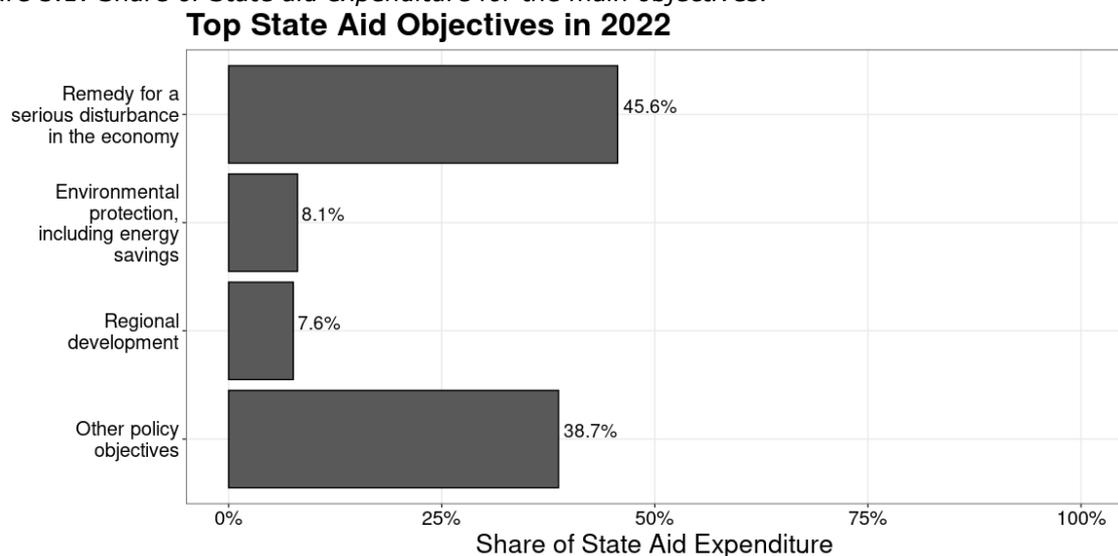
25.3 State Aid Spending - Top Objectives and Instruments

Around 53.7% of State aid spending in Slovakia was concentrated in two main policy objectives. Around 45.6% was directed towards “Remedy for a serious disturbance in the economy” while 8.1% to “Environmental protection, including energy savings”.

Furthermore, Slovakia devoted around 7.6% towards “Regional development” and 38.7% to “Other policy objectives”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 52.8% of the total GBER spending, as illustrated in Table 3.1.

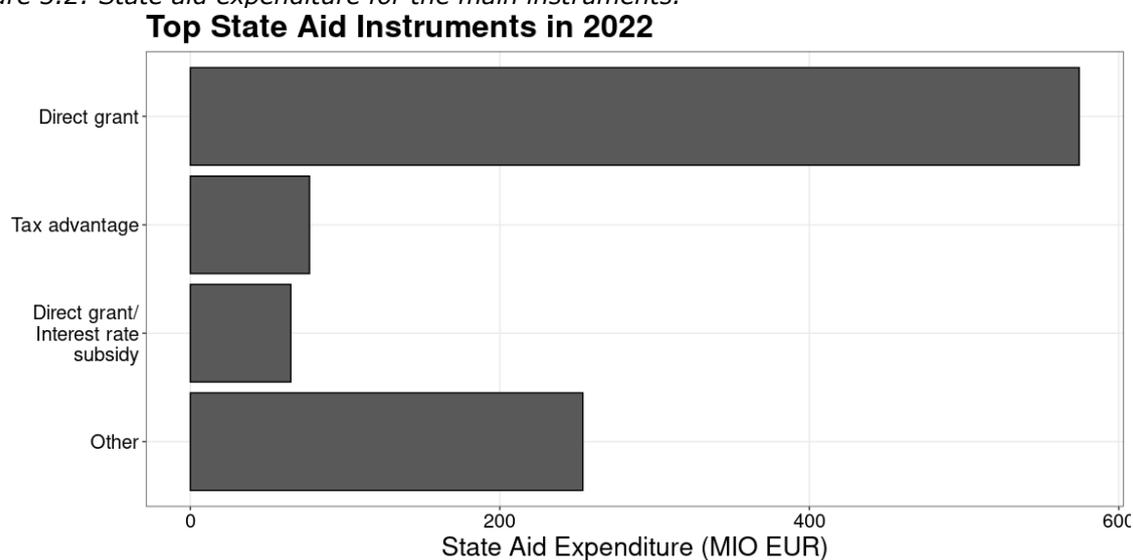
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid for the recruitment of disadvantaged workers in the form of wage subsidies (Article 32)	17.8%
Regional aid - investment aid (Art. 14) - Scheme	17.0%
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	10.6%
Aid for start-ups (Art. 22)	7.4%
Total top 4 GBER articles	52.8%

In terms of State aid instruments, Slovakia privileged the use of "Direct grant" (around EUR 574.5 million, 59.2% of total State aid spending), followed by "Other" (EUR 214.3 million, 22.1% of total State aid spending), and "Tax advantage" (around EUR 77 million, 7.9% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

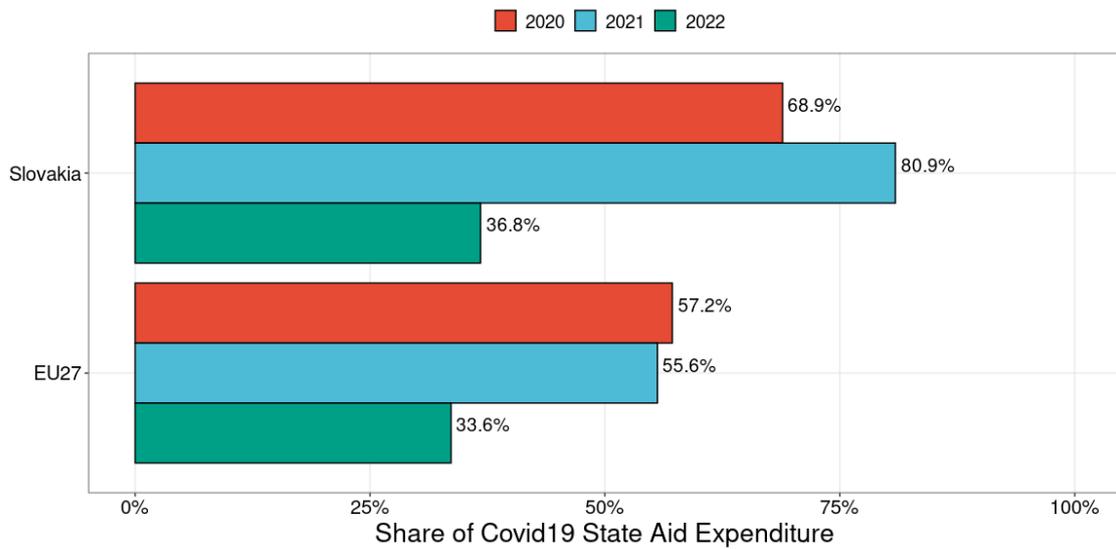
Figure 3.2: State aid expenditure for the main instruments.



25.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Slovakia amounted to EUR 356.6 million i.e., 36.8% of the total State aid expenditure. In 2020 this amounted to EUR 1.1 billion, i.e., 68.9% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

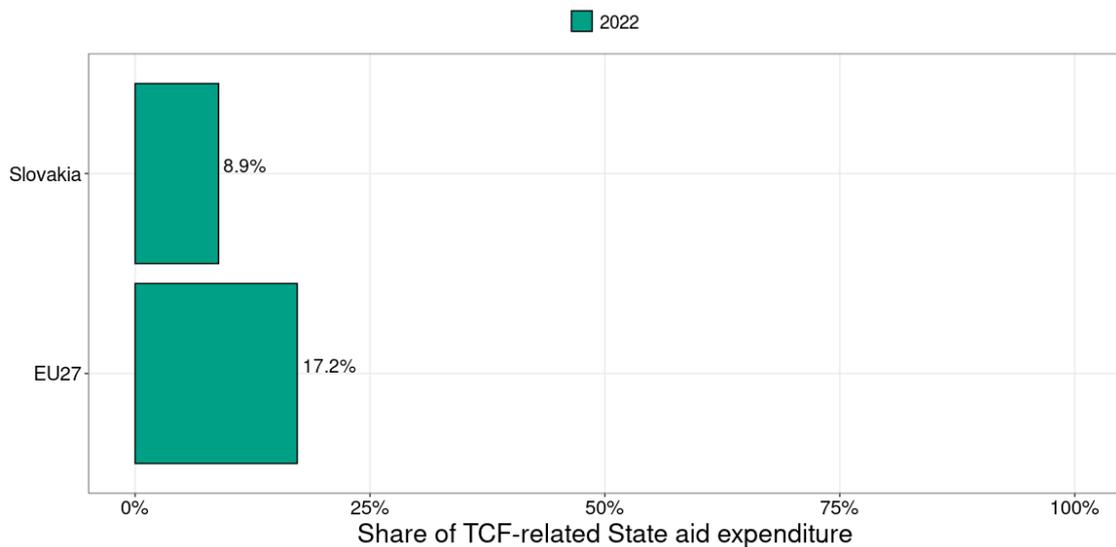


25.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Slovakia amounted to EUR 86.1 million i.e., 8.9% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



26 Country Focus on Slovenia in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

26.1 Case and Procedural Information

The total number of active measures corresponded to 243 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

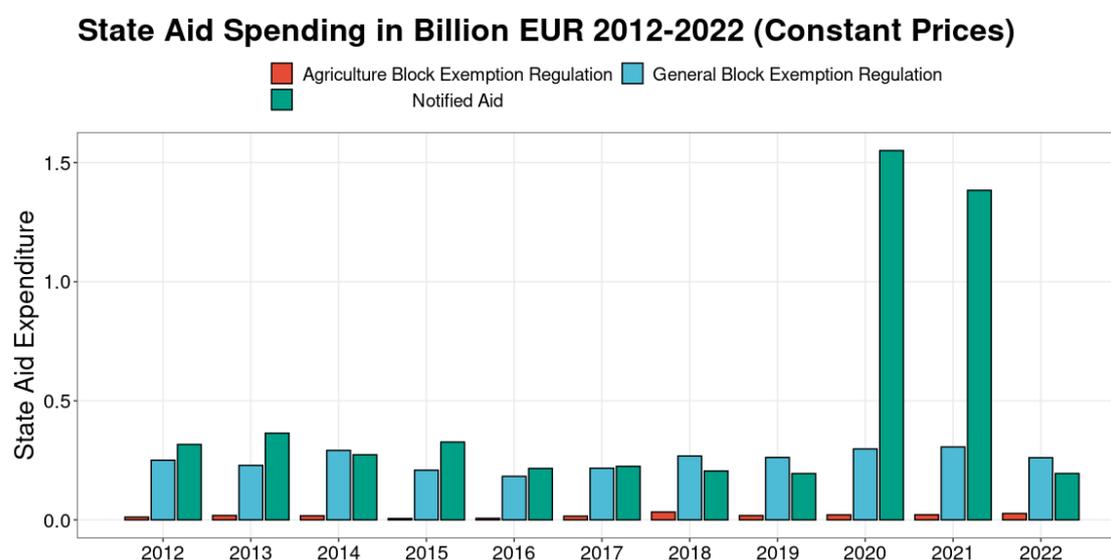
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	179	73.7%
General Block Exemption Regulation	36	14.8%
Notified Aid	28	11.5%
Total	243	100.0%

In 2022, the number of GBER measures in Slovenia reached 14.8% of the total number of measures, with 18.2% of all newly implemented measures falling under GBER.

26.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Slovenia during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.



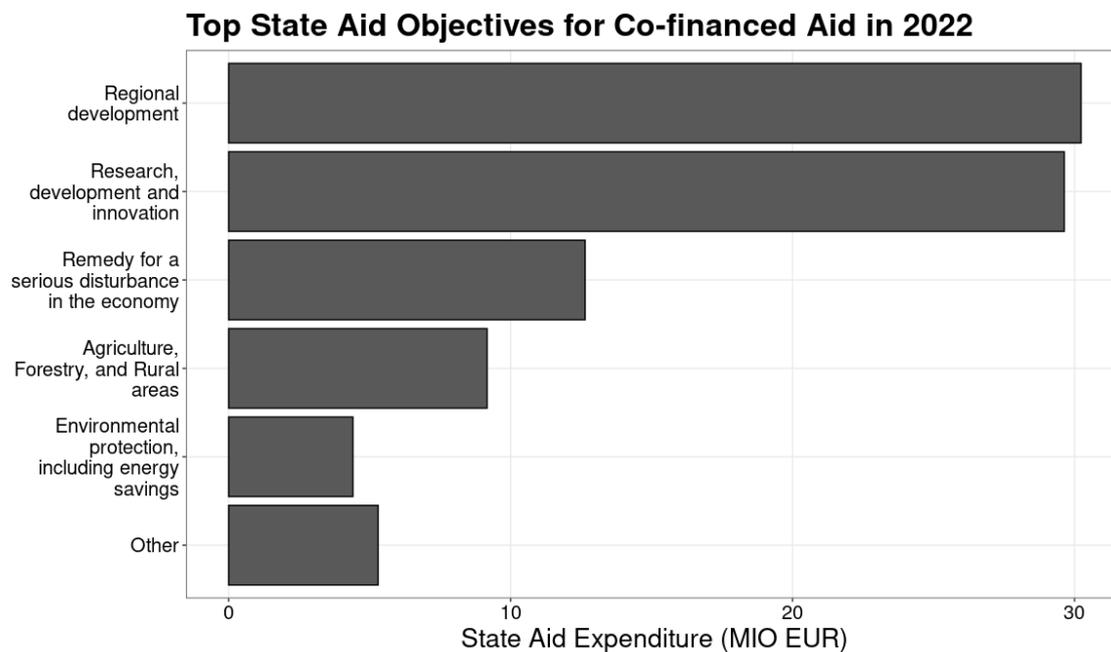
In 2022, the total State aid spending for Slovenia amounted to EUR 0.5 million. The 5 biggest State aid measures in absorbed 60.5% of the total spending i.e., EUR 292.1million.

Finally, the amount of aid co-financed with EU funds in Slovenia corresponded to EUR 91.4 million (around 18.9% of the total spending) and was mostly concentrated in Regional development

(33.1%), Research, development and innovation (32.4%) and Remedy for a serious disturbance in the economy (13.8%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



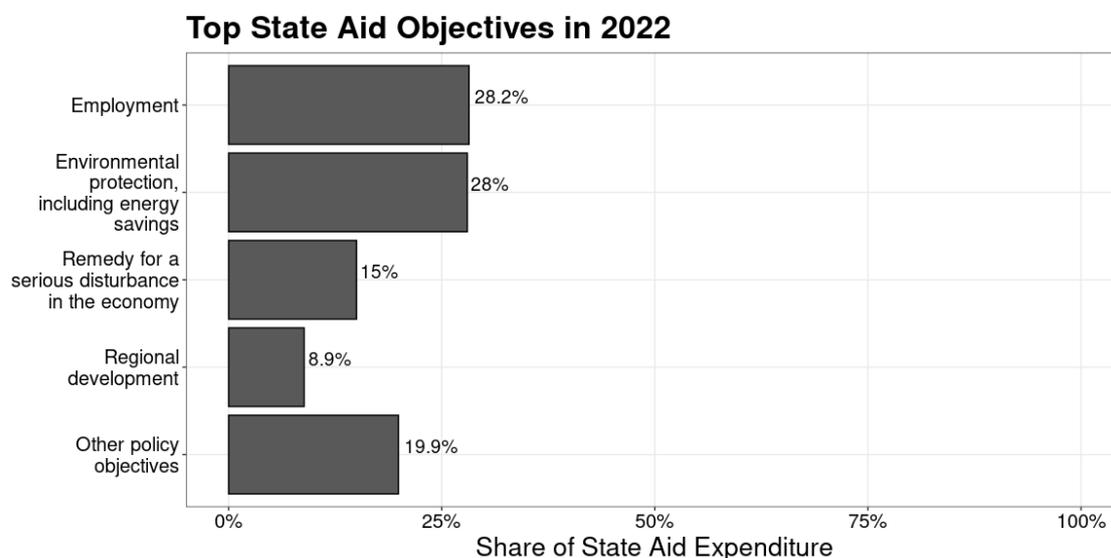
26.3 State Aid Spending - Top Objectives and Instruments

Around 56.2% of State aid spending in Slovenia was concentrated in two main policy objectives. Around 28.2% was directed towards "Employment" while 28% to "Environmental protection, including energy savings".

Furthermore, Slovenia devoted around 15% towards "Remedy for a serious disturbance in the economy" and 8.9% to "Regional development".

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 74.9% of the total GBER spending, as illustrated in Table 3.1.

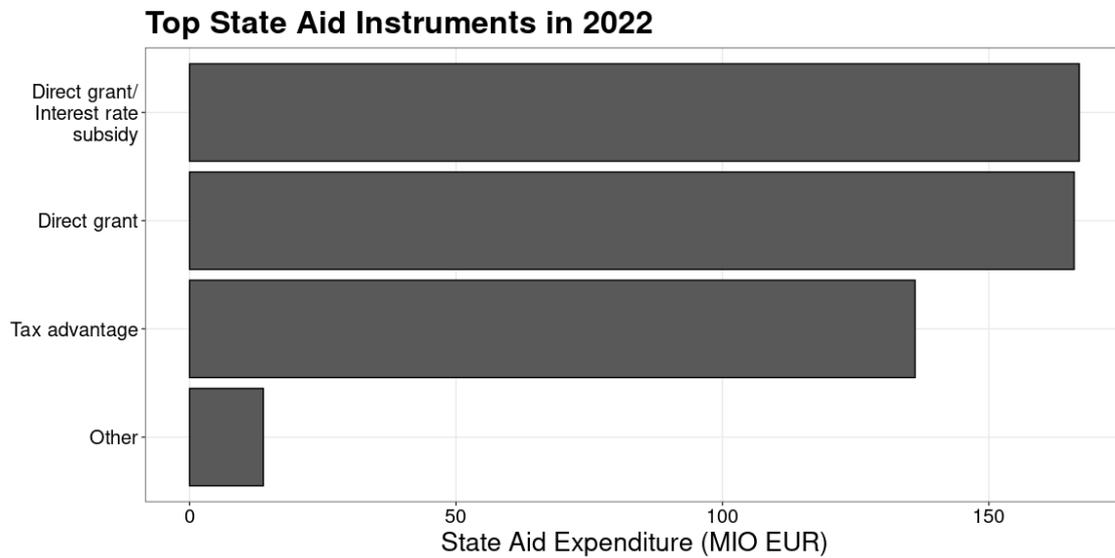
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid for the employment of workers with disabilities in the form of wage subsidies (Article 33)	40.2%
Regional aid – investment aid (Art. 14) – Scheme	15.6%
Aid for compensating the additional costs of employing workers with disabilities (Art. 34)	9.6%
Experimental development (Art. 25(2)©)	9.5%
Total top 4 GBER articles	74.9%

In terms of State aid instruments, Slovenia privileged the use of “Direct grant/ Interest rate subsidy” (around EUR 167 million, 34.6% of total State aid spending), followed by “Direct grant” (EUR 166 million, 34.4% of total State aid spending), and “Tax advantage” (around EUR 136.2 million, 28.2% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

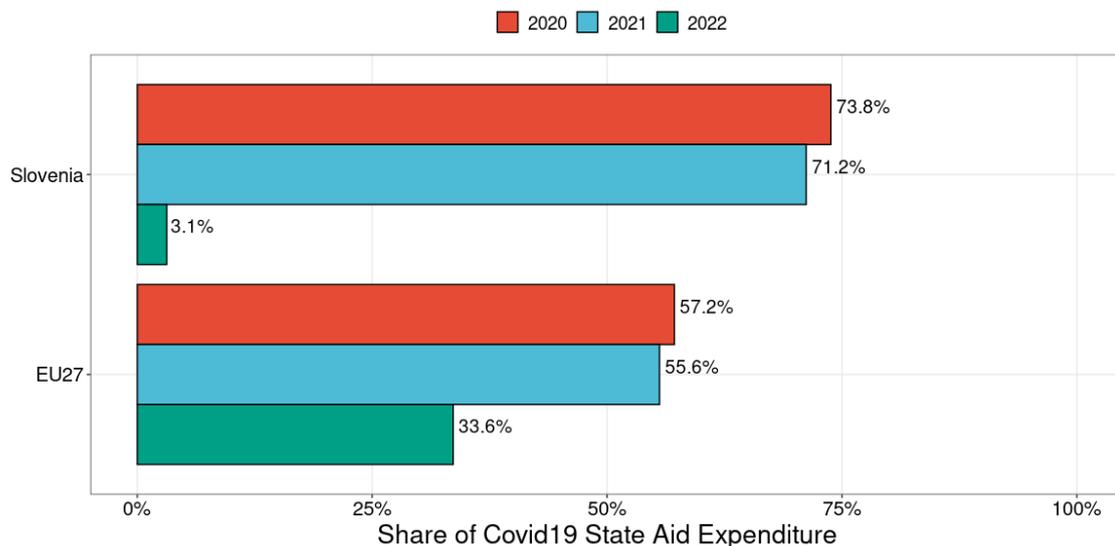
Figure 3.2: State aid expenditure for the main instruments.



26.4 State Aid Spending – Covid19

In 2022 the Covid19-related expenditure for Slovenia amounted to EUR 15.2 million i.e., 3.1% of the total State aid expenditure. In 2020 this amounted to EUR 1.2 billion, i.e., 73.8% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

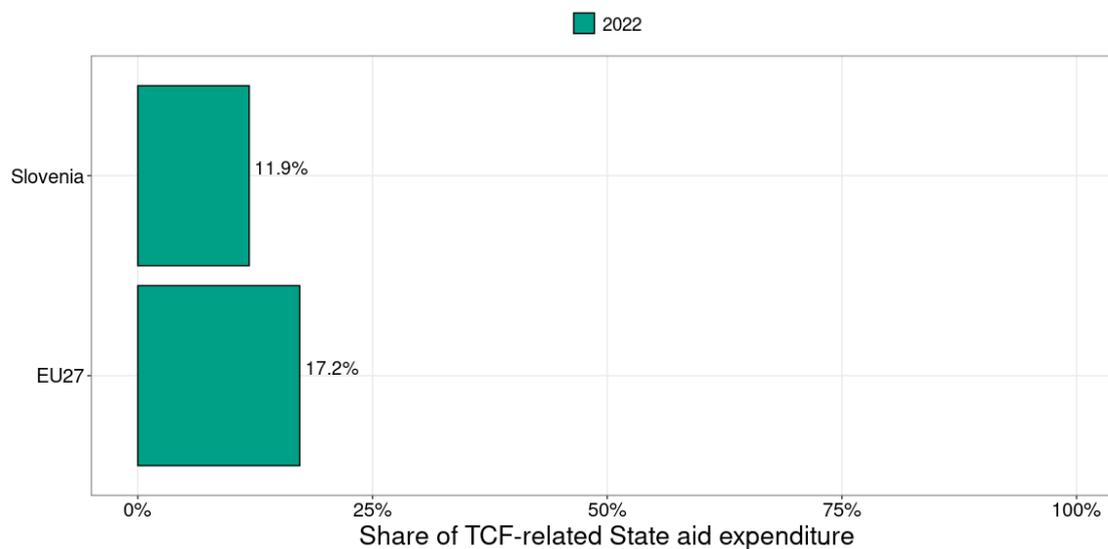


26.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Slovenia amounted to EUR 57.3 million i.e., 11.9% of the total State aid expenditure.

We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.2% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.



27 Country Focus on Sweden in the Year 2022

In this document, unless otherwise stated, the reported State Aid expenditure always excludes aid expenditure to railways.

27.1 Case and Procedural Information

The total number of active measures corresponded to 139 in 2022 and the detailed breakdown by type of measure is provided in Table 1.1.

Table 1.1: Number and share of State aid measures by type of procedure.

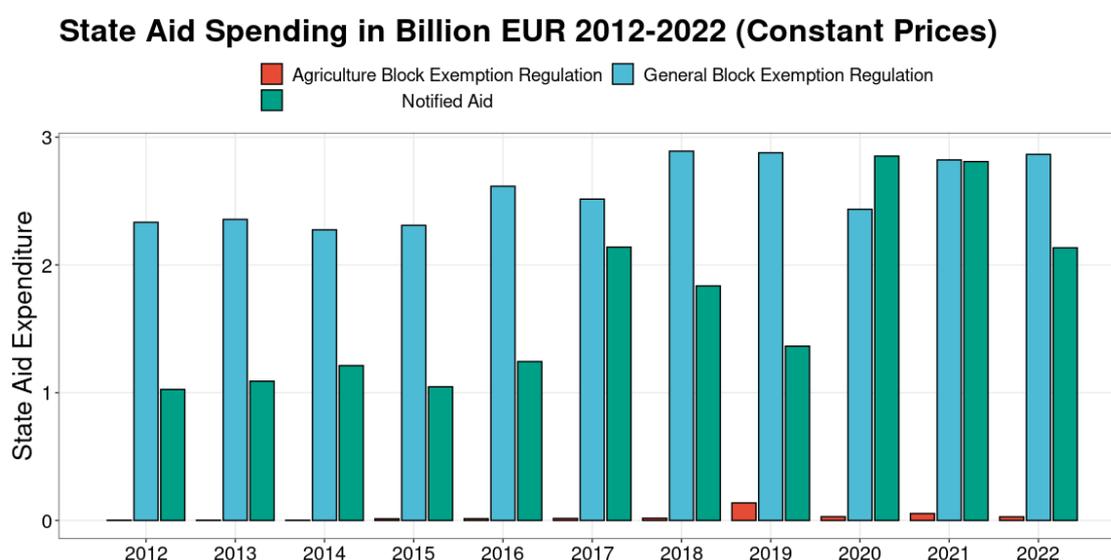
State Aid Measures in 2022		
Type of Procedure	Number of Active Measures	Share of Total
Agriculture Block Exemption Regulation	12	8.6%
Fisheries Block Exemption Regulation	4	2.9%
General Block Exemption Regulation	92	66.2%
Notified Aid	31	22.3%
Total	139	100.0%

In 2022, the number of GBER measures in Sweden reached 66.2% of the total number of measures, with 71.7% of all newly implemented measures falling under GBER.

27.2 State Aid Spending - Overview

Figure 2.1 illustrates the evolution of the State aid expenditure, broken down by type of procedure, for Sweden during the period 2012-2022 in constant prices adjusted by the yearly value of GDP (with the exclusion of aid under the fisheries block exemption regulation because it is negligible compared to the aid given under the other type of procedures).

Figure 2.1: State aid expenditure at constant prices by type of procedure.

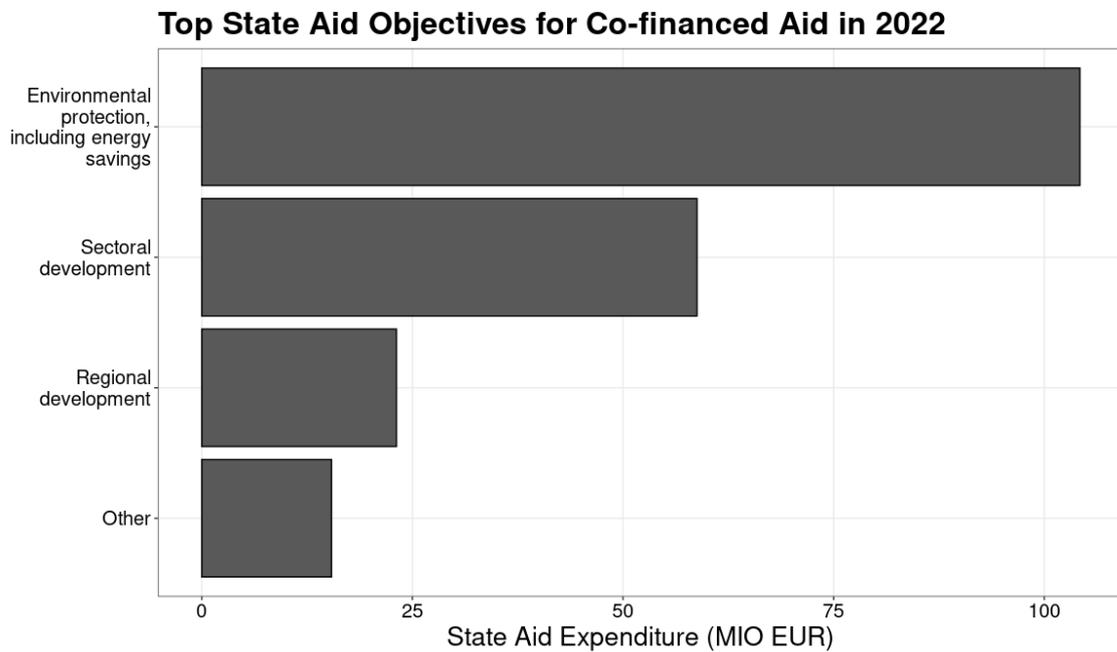


In 2022, the total State aid spending for Sweden amounted to EUR 5 million. The 5 biggest State aid measures in absorbed 56.8% of the total spending i.e., EUR 2.9billion.

Finally, the amount of aid co-financed with EU funds in Sweden corresponded to EUR 201.5 million (around 4% of the total spending) and was mostly concentrated in Environmental protection, including energy savings (51.7%), Sectoral development (29.2%) and Regional development (11.5%).

Figure 2.2 illustrates the actual amount of the co-financed aid for the most important co-financed objectives.

Figure 2.2: State expenditure for the main co-financed State aid objectives.



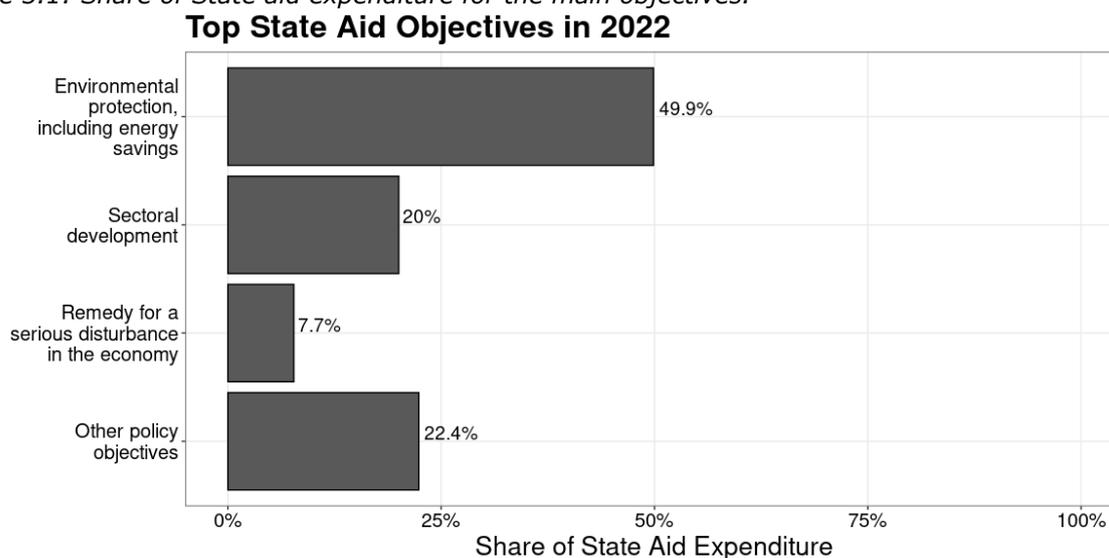
27.3 State Aid Spending – Top Objectives and Instruments

Around 69.9% of State aid spending in Sweden was concentrated in two main policy objectives. Around 49.9% was directed towards “Environmental protection, including energy savings” while 20% to “Sectoral development”.

Furthermore, Sweden devoted around 7.7% towards “Remedy for a serious disturbance in the economy” and 22.4% to “Other policy objectives”.

The data is also illustrated in the Figure 3.1.

Figure 3.1: Share of State aid expenditure for the main objectives.



As to GBER, the top 4 key articles absorbed about 75% of the total GBER spending, as illustrated in Table 3.1.

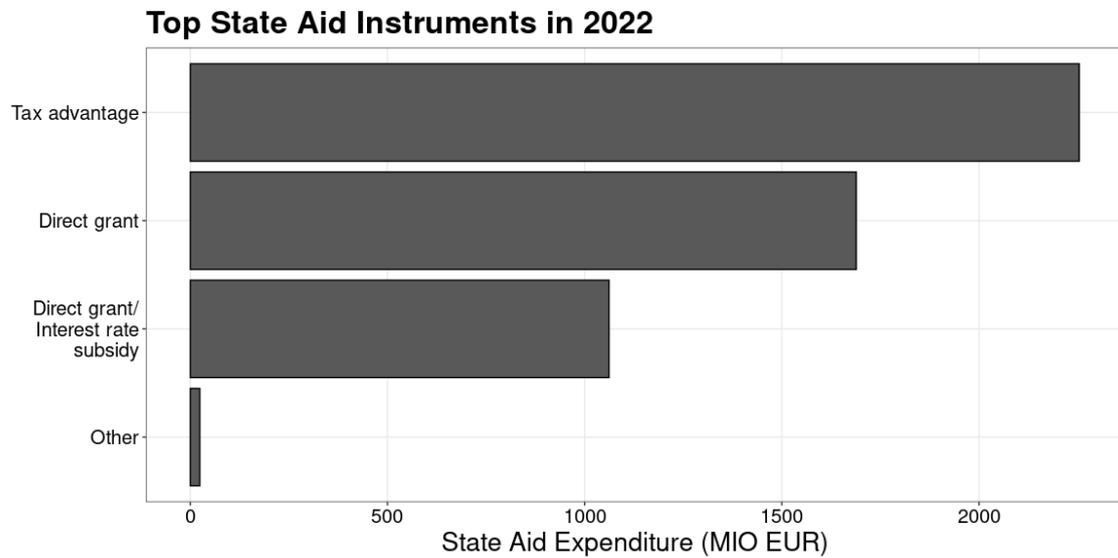
Table 3.1: Contribution of the top 4 GBER articles to the total GBER expenditure.

Top GBER Articles in 2022	
GBER Article	Share of Total
Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)	63.2%
Aid for fixed broadband networks (Art. 52)	4.3%
Aid for culture and heritage conservation (Art. 53)	3.8%
Investment aid for energy efficiency measures (Art.38)	3.7%
Total top 4 GBER articles	75.0%

In terms of State aid instruments, Sweden privileged the use of "Tax advantage" (around EUR 2.3 billion, 44.9% of total State aid spending), followed by "Direct grant" (EUR 1.7 billion, 33.6% of total State aid spending), and "Direct grant/ Interest rate subsidy" (around EUR 1.1 billion, 21.1% of total State aid spending).

In Figure 3.2 we illustrate the actual spending for the top instruments in 2022.

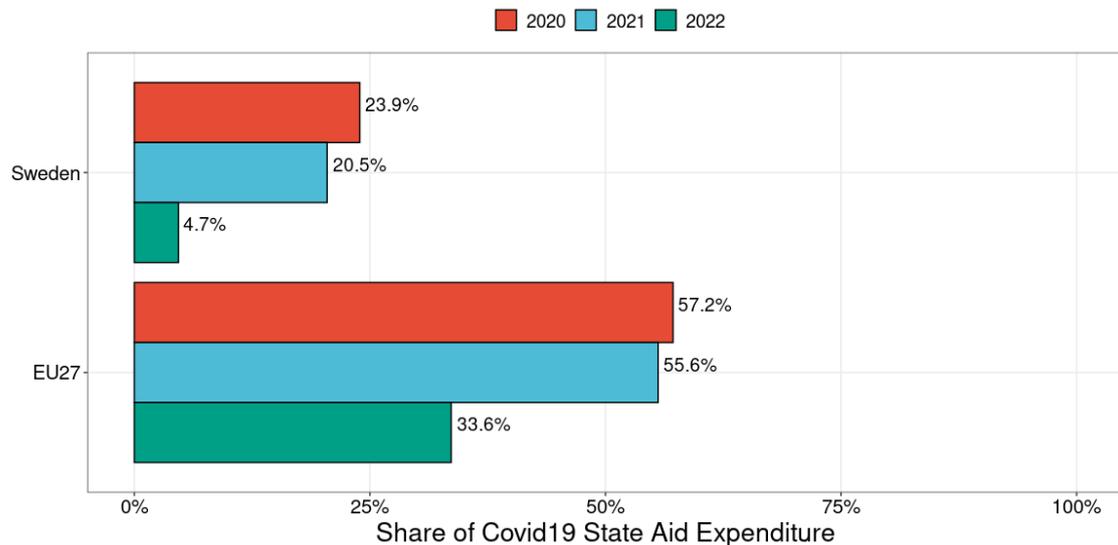
Figure 3.2: State aid expenditure for the main instruments.



27.4 State Aid Spending - Covid19

In 2022 the Covid19-related expenditure for Sweden amounted to EUR 235.7 million i.e., 4.7% of the total State aid expenditure. In 2020 this amounted to EUR 1.2 billion, i.e., 23.9% of the total. We compare this figure to the share of Covid19 State aid expenditure at the EU27 level (33.6% in 2022 and 57.2% in 2020). In Figure 4.1 we plot these values for ease of comparison including also the data for 2021.

Figure 4.1: Covid19 expenditure as a share of total State aid expenditure.

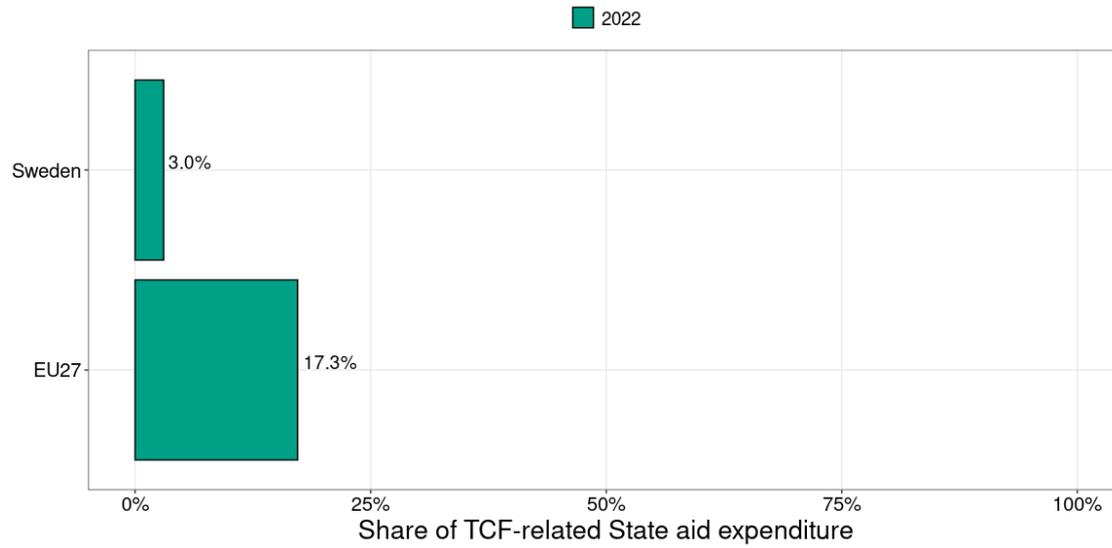


27.5 State aid expenditure for measures related to the Russian invasion of Ukraine

In 2022 the expenditure to counterbalance the negative effects of the Russian invasion of Ukraine, under the Temporary Crisis Framework or based on its principles, for Sweden amounted to EUR 152.7 million i.e., 3.0% of the total State aid expenditure.

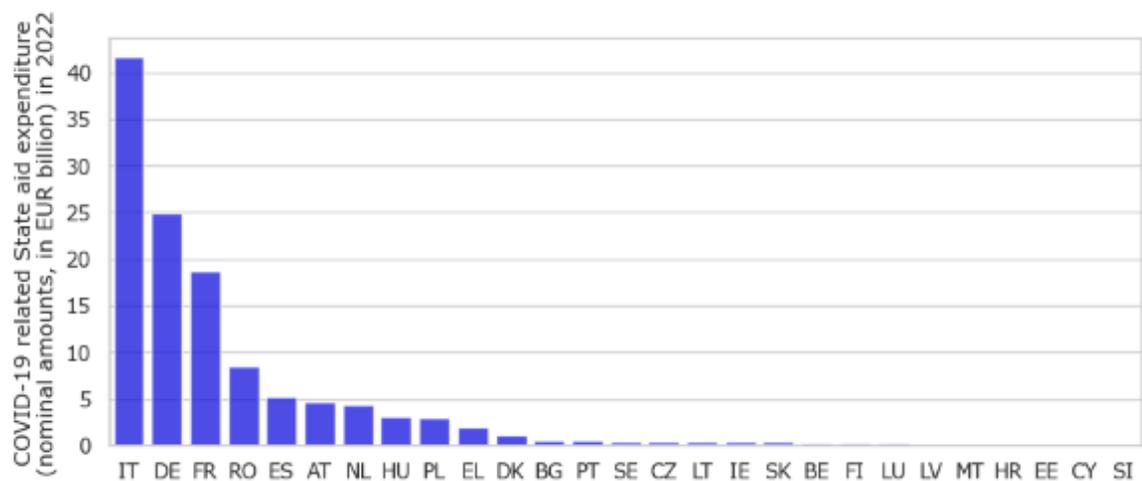
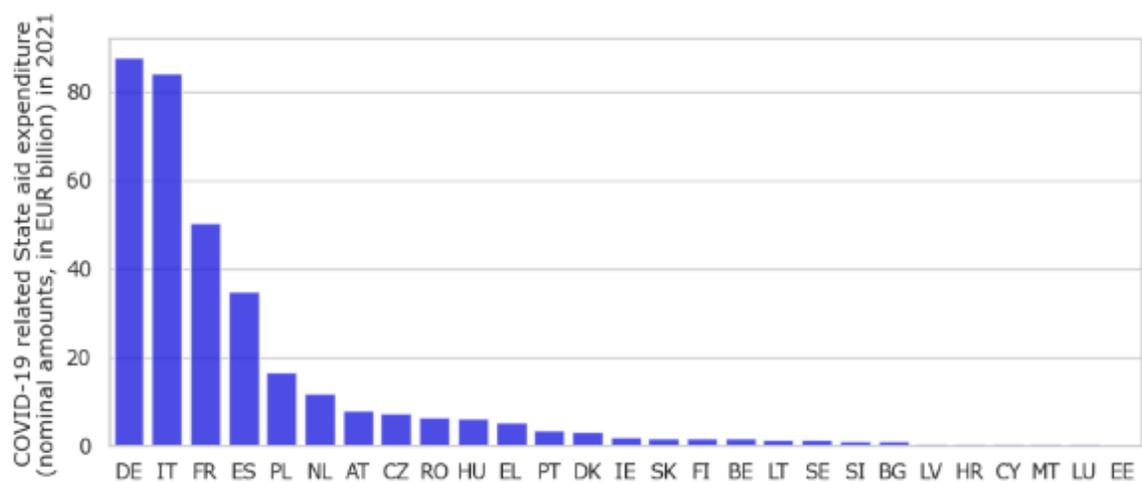
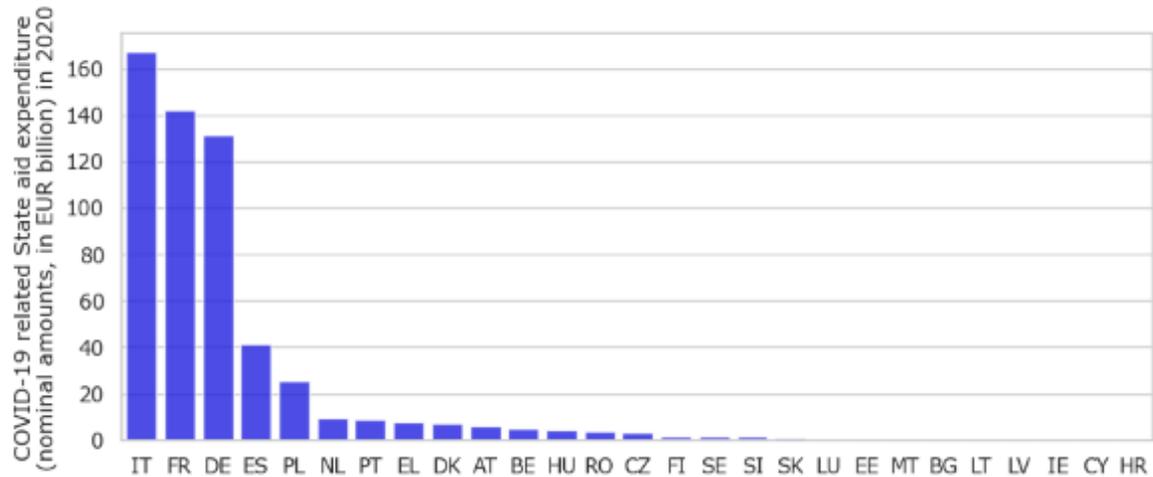
We compare this figure to the share of TCF-related State aid expenditure at the EU27 level 17.3% in 2022 in Figure 5.1.

Figure 5.1: TCF-related expenditure as a share of total State aid expenditure.

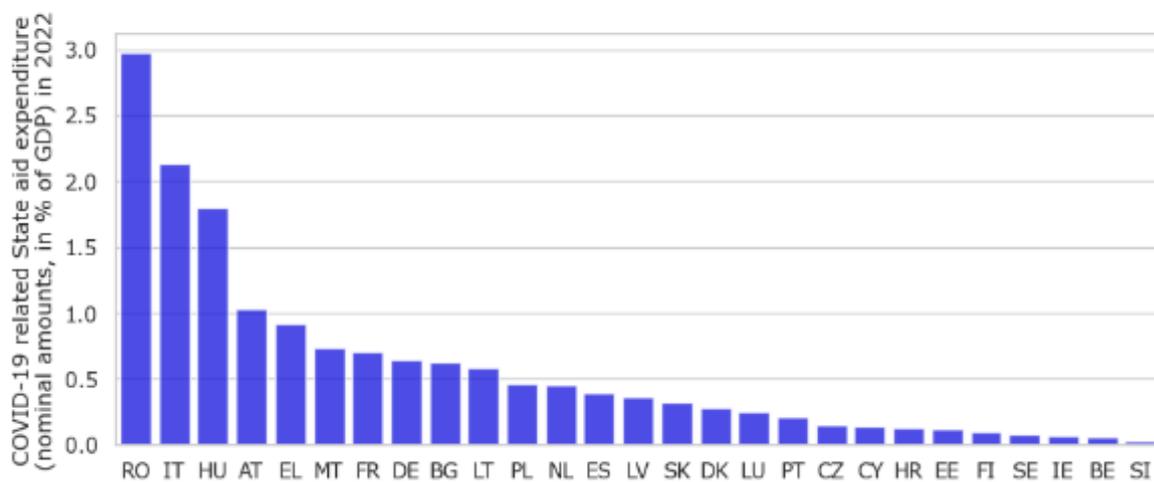
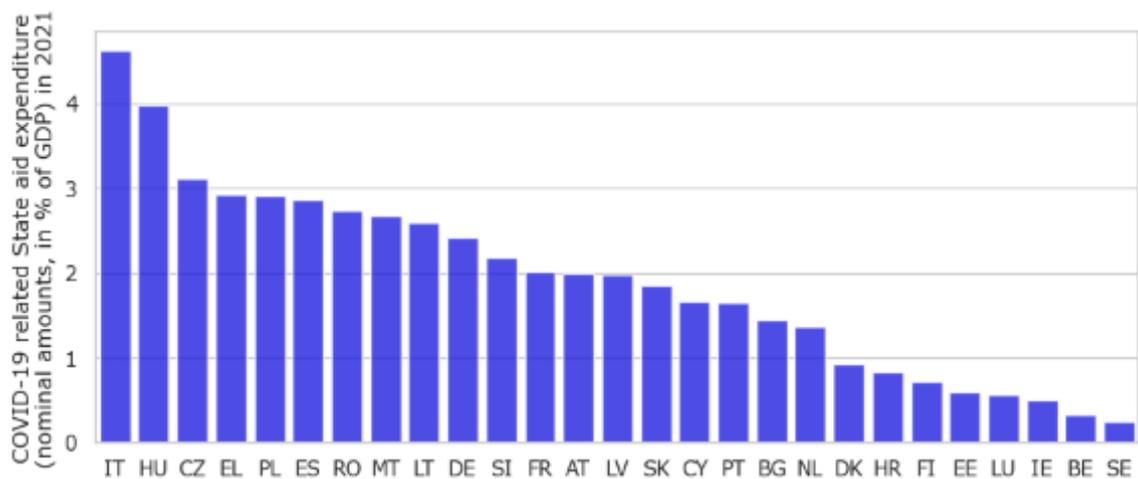
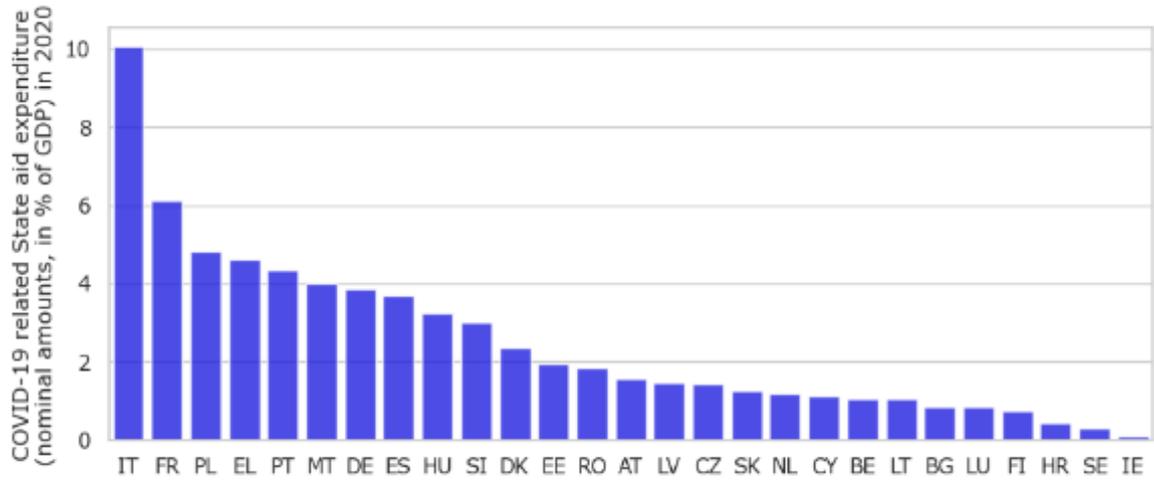


Annex III.

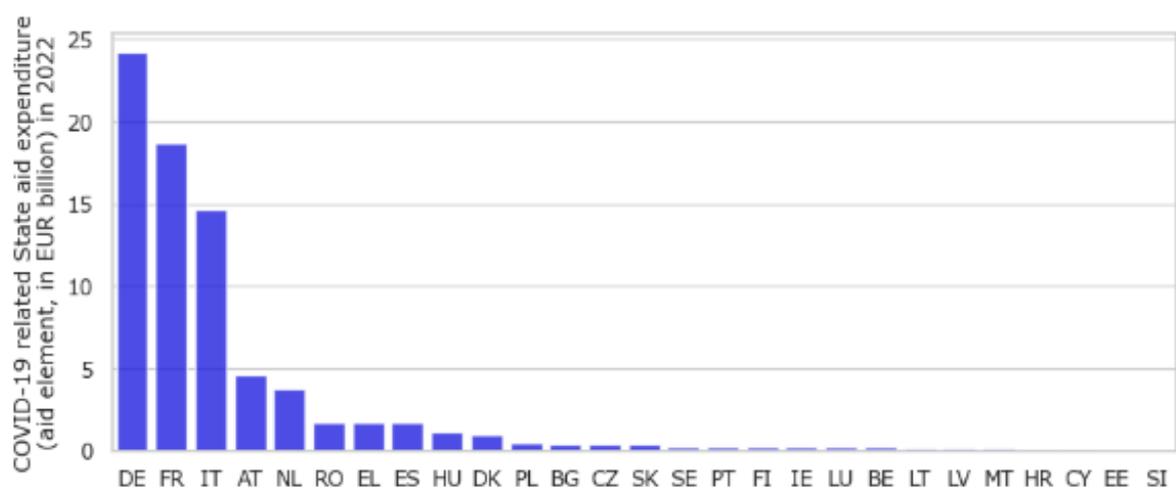
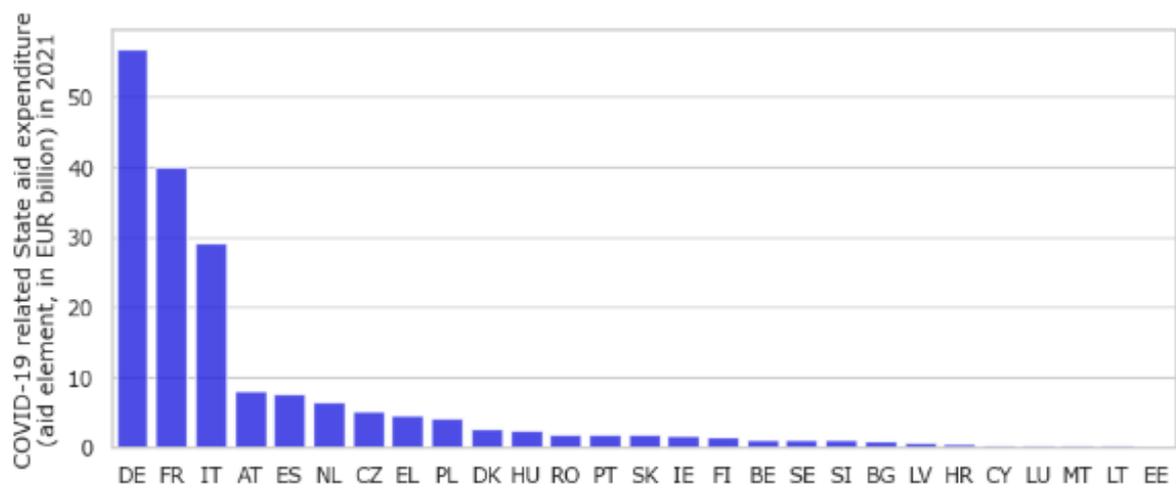
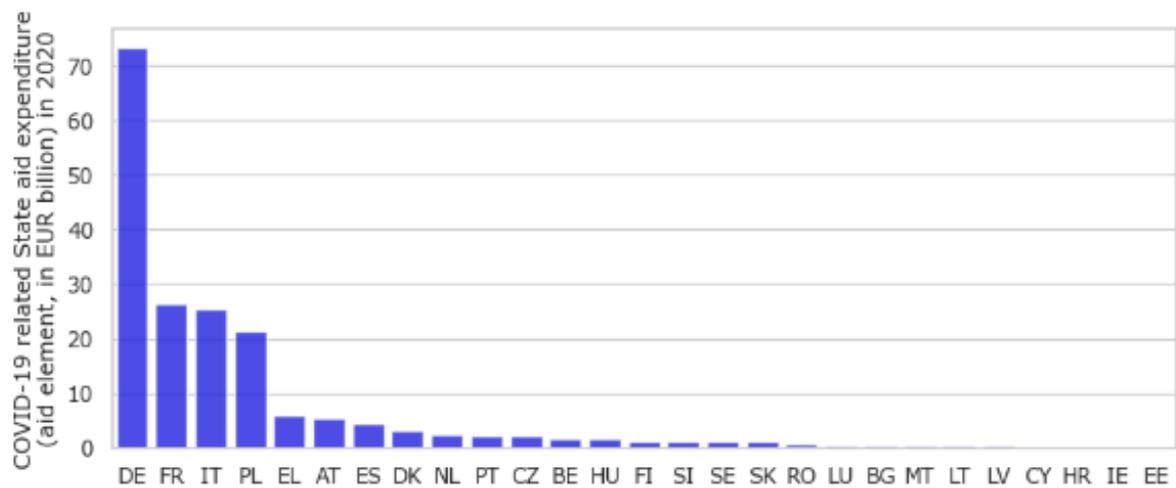
Total State Aid expenditure for COVID-19 measures by Member State, nominal amounts in EUR billion, in 2020, 2021 and 2022.



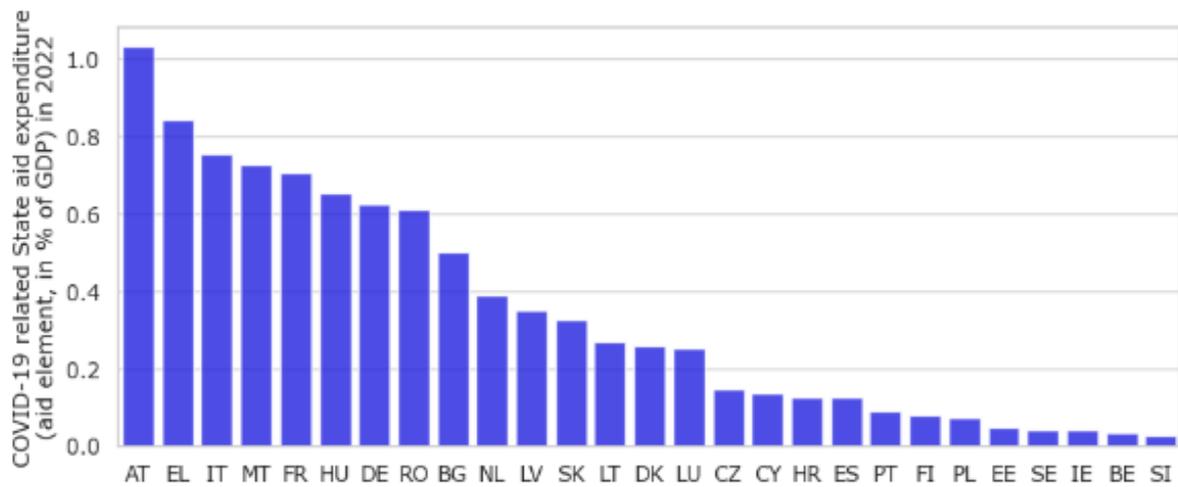
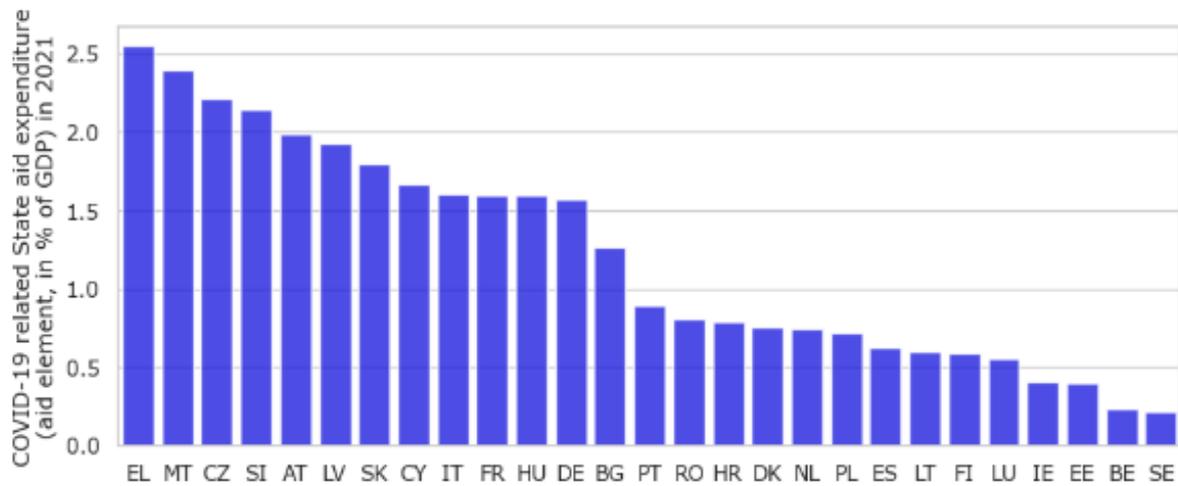
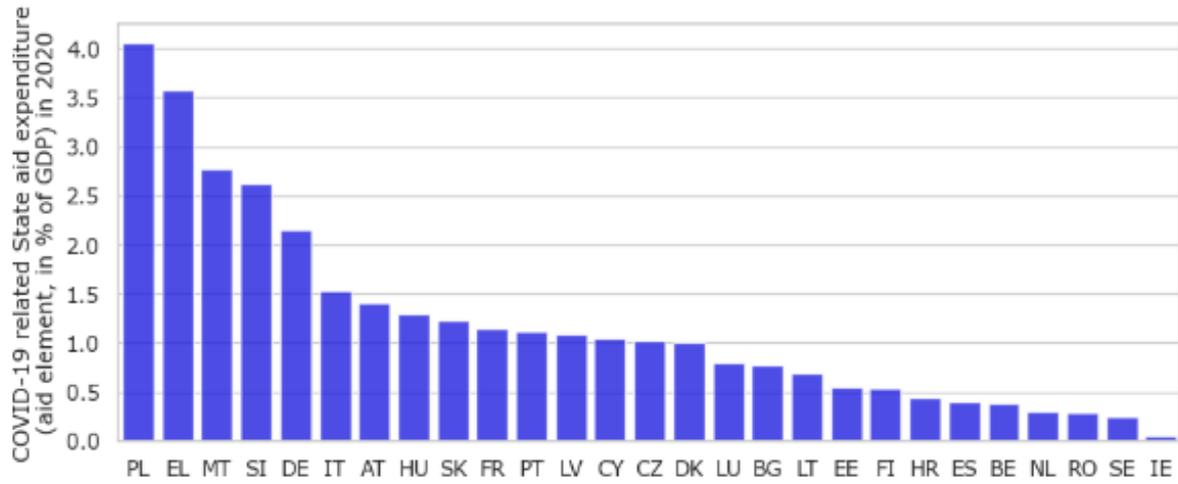
Total State Aid expenditure for COVID-19 measures by Member State, nominal amounts as a percentage of yearly GDP, in 2020, 2021 and 2022.



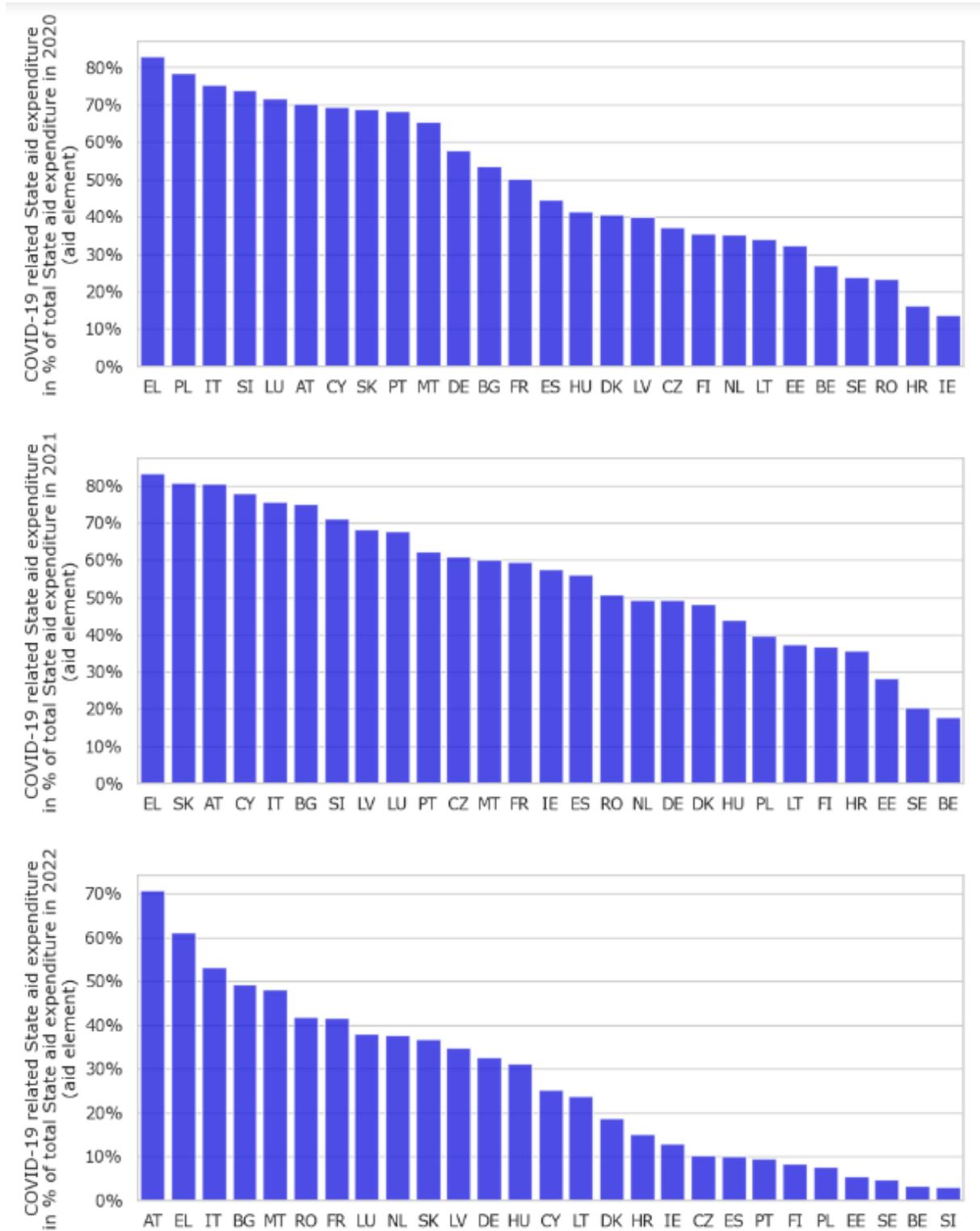
Total State Aid expenditure for COVID-19 measures by Member State, aid elements in EUR billion, in 2020, 2021 and 2022.



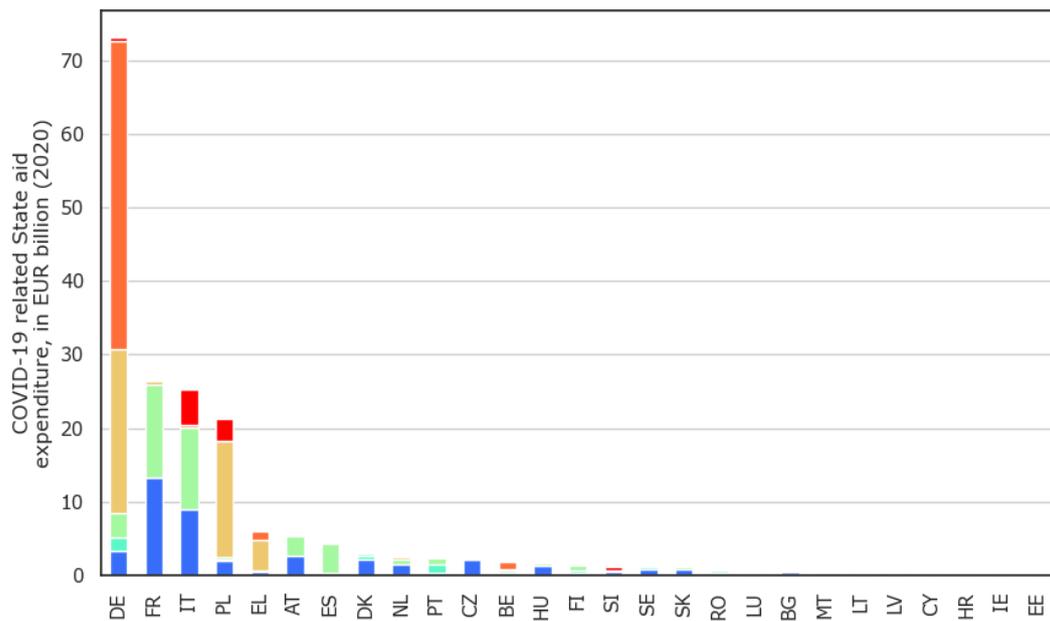
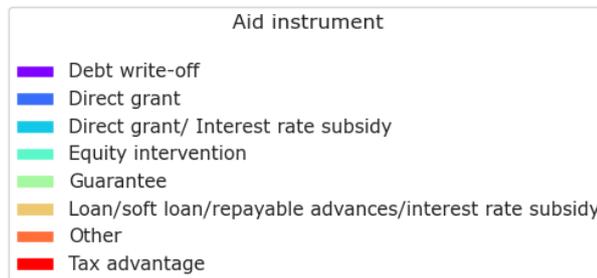
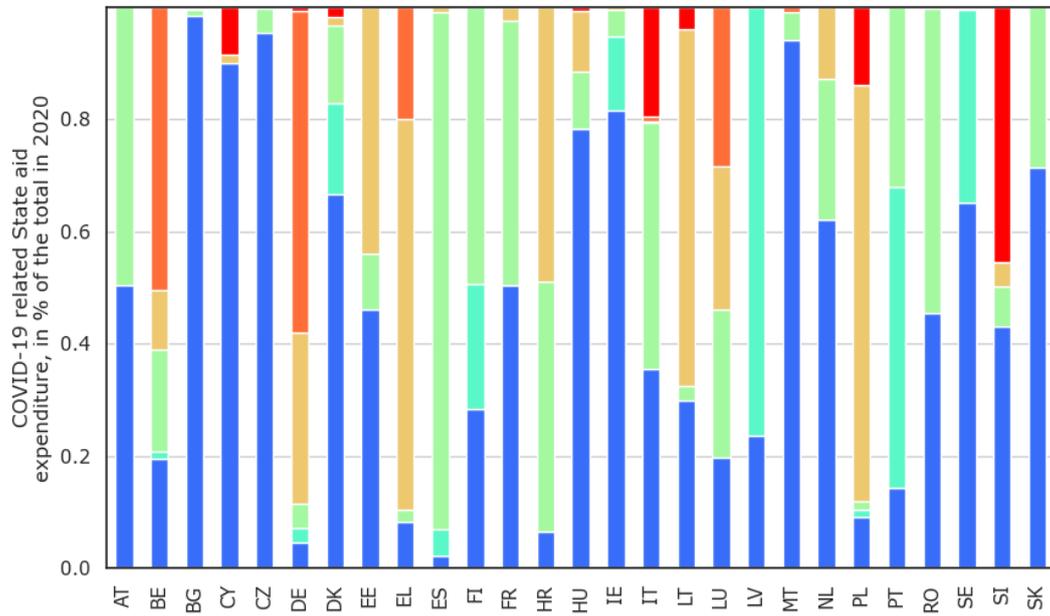
Total State Aid expenditure for COVID-19 measures by Member State, aid elements as a percentage of yearly GDP, in 2020, 2021 and 2022.



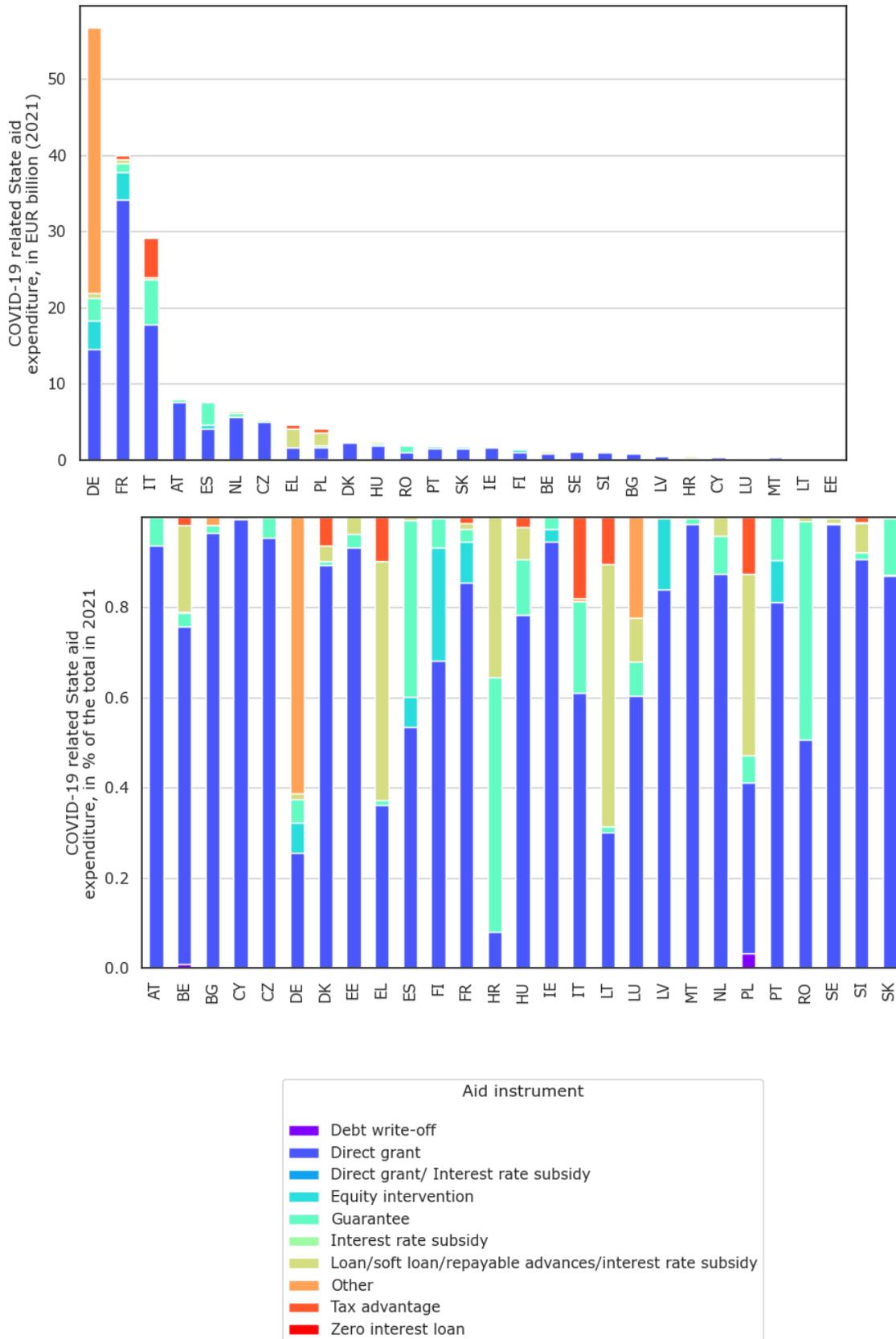
Total State Aid expenditure for COVID-19 measures, aid element, as a percentage of total State aid, by Member State in 2020, 2021 and 2022.



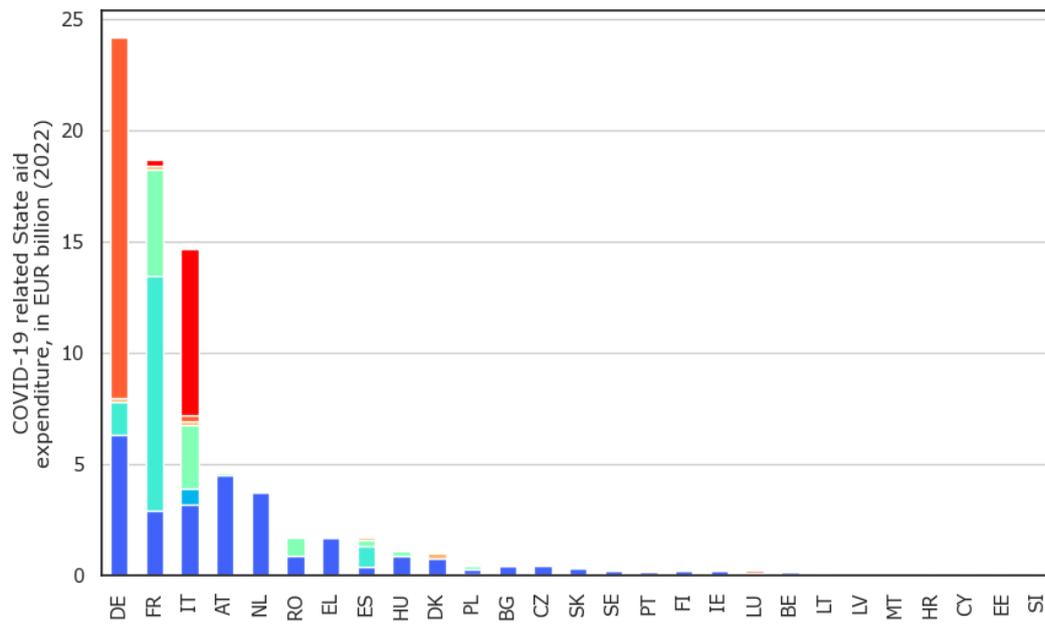
Total State aid expenditure for COVID-19 measures in 2020, by instruments, aid elements in EUR billion and aid elements in % of the total, by Member State



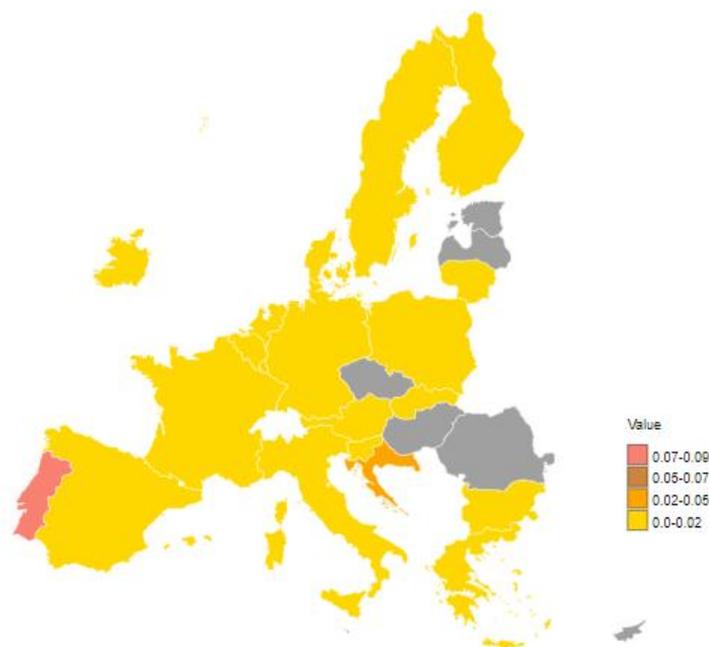
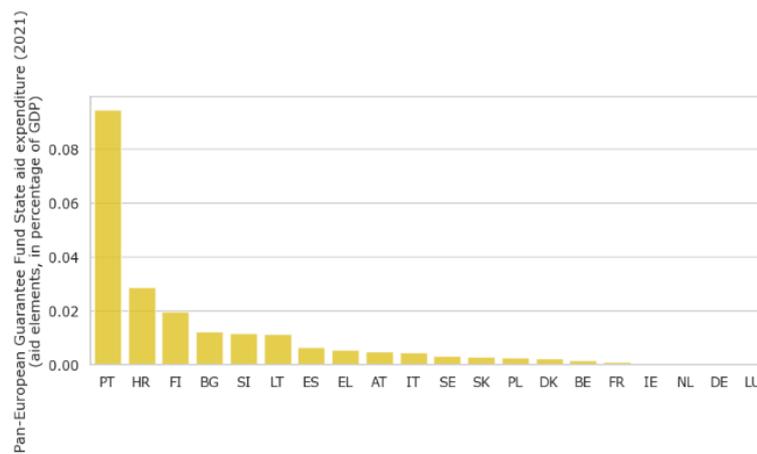
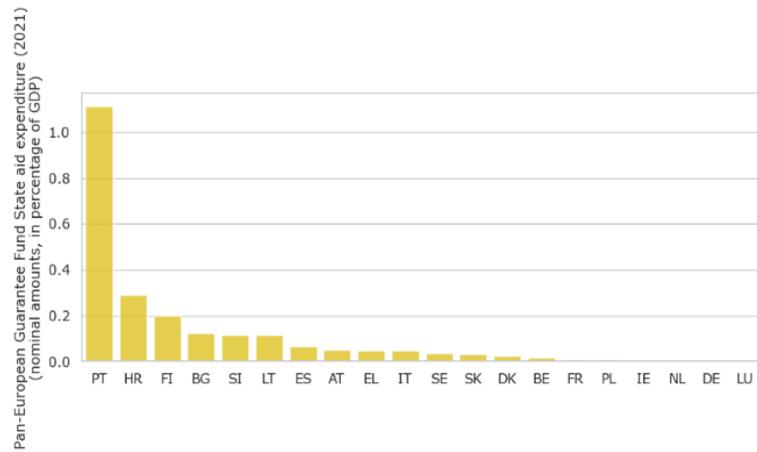
Total State aid expenditure for COVID-19 measures in 2021, by instruments, aid elements in EUR billion and aid elements in % of the total, by Member State



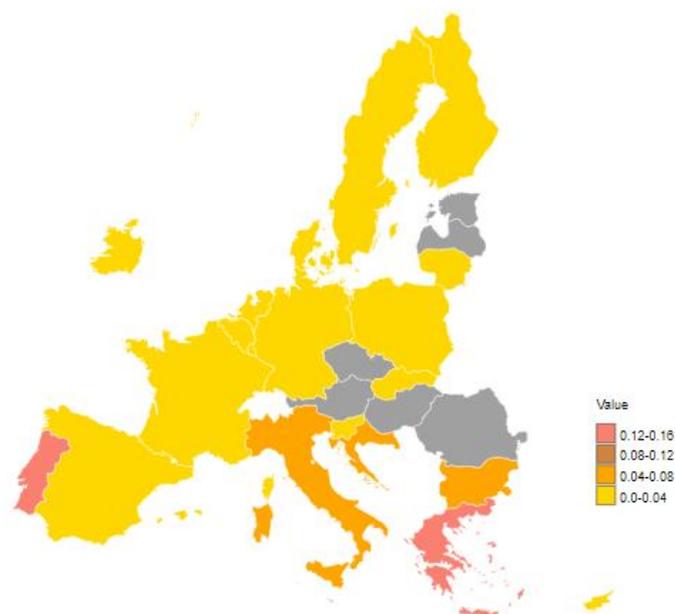
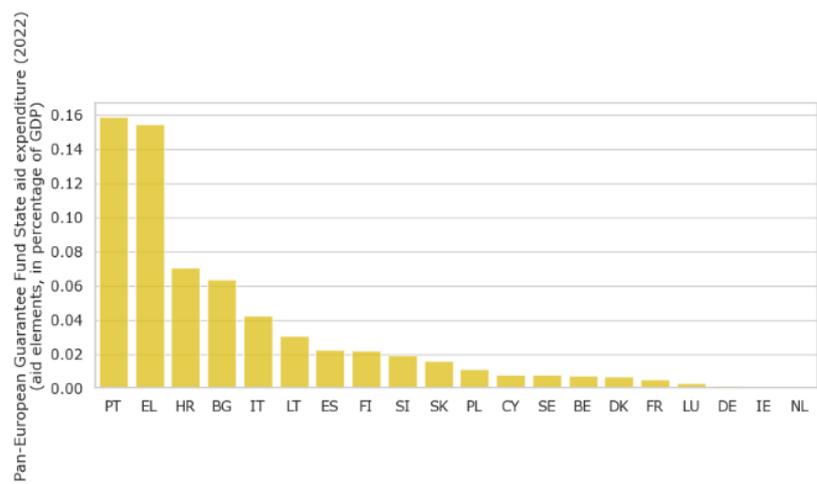
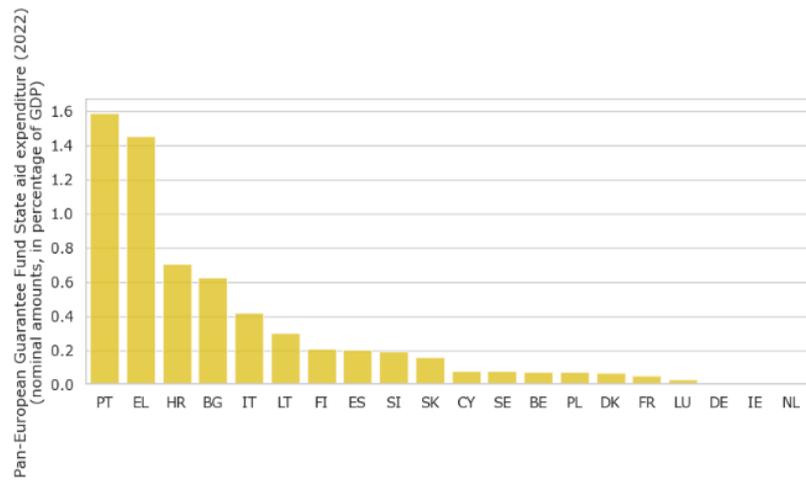
Total State aid expenditure for COVID-19 measures in 2022, by instruments, aid elements in EUR billion and aid elements in % of the total, by Member State



Total State aid expenditure for measures under the Pan-European Guarantee Fund in 2021 in percentage of GDP, in nominal amounts (above) and aid elements (below) as bar chart and as map



Total State aid expenditure for measures under the Pan-European Guarantee Fund in 2022 in percentage of GDP, in nominal amounts (above) and aid elements (below) as bar chart and as map



27.6 Relation between COVID-19 State aid and economic damage to GDP

Since the onset of the pandemic, the State aid COVID Temporary Framework has enabled Member States to use the full flexibility foreseen under State aid rules to support businesses in need in a timely, targeted and proportionate way, while preserving the level playing field in the Single Market and maintaining horizontal conditions applicable to everyone. This section examines how proportionate the State aid responses implemented by Member States were with respect to the suffered economic shock. This is done by comparing each Member State's total State aid expenditure for COVID-19 measures in 2020 and 2021 (in percentage points of 2020 and 2021 GDP) against the cumulated real GDP loss rate in 2020 and in 2021¹⁰¹.

Figure a takes into account the nominal amounts of the COVID-19 measures implemented in 2020 and 2021. The relation between the expenditure for COVID-19 State aid measures and the real economic damage to GDP is largely heterogeneous across Member States. Most of the Member States¹⁰² spent more than the cumulated real GDP loss in 2020 and 2021 (in red in the chart). This category includes both some of the wealthiest and largest Member States in the EU as well as less wealthy and large countries. Estonia, Lithuania, and Ireland are exceptional cases as they experienced a cumulated real growth of the GDP in 2020 and 2021. Member States in blue show a total nominal amount of State aid spent under COVID-19 measures that is lower than the GDP loss: Greece, Portugal, Austria, Romania, Bulgaria, and Finland provided to their economies an overall amount ranging between 50% and 100% of the cumulated real GDP loss in the two years considered, while Belgium and Sweden between 25% and 50%. The total nominal amount of the COVID-19 measures implemented by Croatia corresponds to less than 25% of the cumulated real GDP loss experienced in 2020 and 2021. This shows that also the Member States that spent relatively less compared to their economic damage are very heterogeneous in terms of wealth and size.

However, a fair comparison of State aid measures channelled through different instruments should take into account the aid elements instead of the nominal amounts to adequately reflect the different distortive impact of the various instruments on competition. Figure b shows the relation between the cumulated COVID-19 State aid expenditure in aid elements and the cumulated real GDP loss rate in 2020 and 2021. In terms of aid element, among the largest spenders in nominal amounts, Spain appears to have spent less than 25% of its own total GDP loss, while France, Italy, and the Netherlands between 25% and 50% of their own GDP loss, having awarded a large share of their aid in the form of guarantees. Also, Germany, despite still appearing among the Member States that have spent more than 100% of the cumulated real GDP loss in 2020 and 2021, has awarded relatively less as compared to the nominal amount¹⁰³.

The picture that emerges shows that the temporary State aid measures adopted in the COVID-19 crisis were proportionate and necessary, matching the economic damage suffered during the crisis. Moreover, there is no evidence of Member States that would have granted an excessively larger amount compared to the others.

¹⁰¹ The loss rate is the gap between the actual GDP and the trend GDP in percentage of trend GDP. The cumulated loss rate is the sum of the loss rate in 2020 and the loss rate in 2021. Source: Ameco, 2023 Autumn Forecast.

¹⁰² Italy, Spain, France, Hungary, Malta, Germany, Poland, Slovenia, the Netherlands, Czechia, Latvia, Denmark, Slovakia, Cyprus, and Luxembourg.

¹⁰³ This is partially due to the fact that Germany reported a large share of its State aid spending for COVID-19 measures under the unspecified instrument category 'other', for which the aid element cannot be determined.

Figure a: Relation between COVID-19 State aid expenditure (nominal amounts) and economic damage to GDP

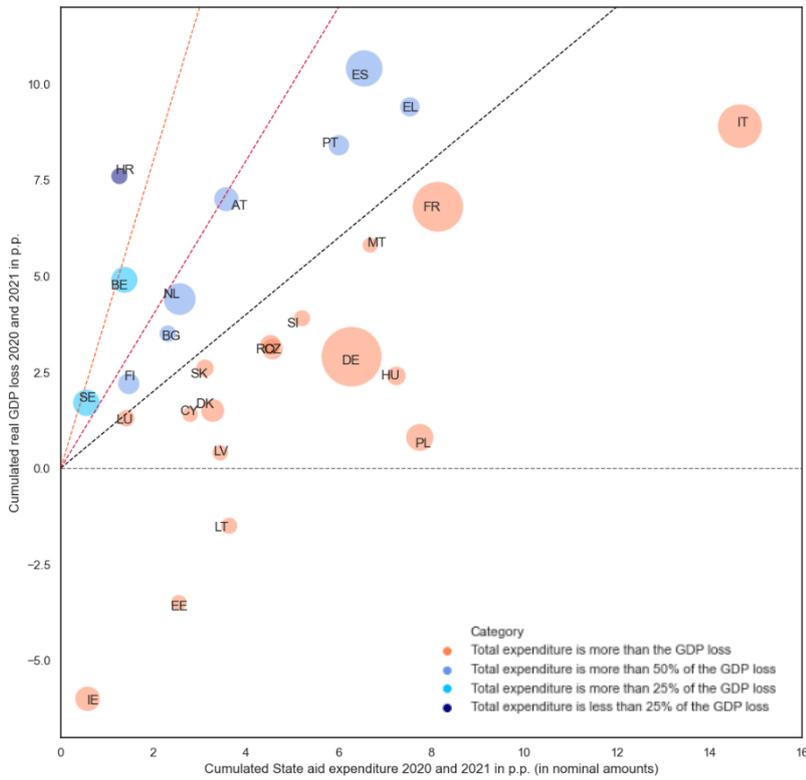


Figure b: Relation between COVID-19 State aid expenditure (aid element) and economic damage to GDP

