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State aid Scoreboard 2020

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Executive Summary

State aid expenditure has kept increasing in 2019 – According to the national expenditure reports for 2019, State aid spending increased in 2019, both in absolute amounts and relative to GDP, excluding aid to agriculture, fisheries and railways. Member States spent EUR 134.6 billion, i.e. 0.81% of GDP, on State aid at European Union level, an increase of about 0.001 p.p. of GDP compared to 2018 (0.81%). In nominal terms, this represents an increase of about 3.6% compared to 2018 expenditure.

State aid finances objectives of common European interest - About 51% of total spending (EUR 69.1 billion), excluding aid to agriculture, fisheries and railways, was attributed to State aid to environmental and energy savings. For all other objectives, Member States spent about EUR 65.4 billion, i.e. 0.39% of GDP, on State aid at European Union level. Research and development including innovation represents 10% (EUR 13.9 billion) of total spending, while Regional Development represents 8.5% (EUR 11.5 billion).

Direct grants are still the preferred State aid instrument - Direct grants are still by far the most popular aid instrument in 2019, representing 62.8% of total expenditure, and even grew increasingly popular over time (53.8% in 2009 and 52.8% in 2013). In 2018, tax exemptions/reductions/deferrals represented a lower share of total spending (30.7% of total expenditure) than in the past (2009, 38% and 2013, 35.2%).

Co-financed projects - Compared to 2018, total spending on co-financed projects at the EU level increased from about EUR 13.7 billion to about EUR 16.3 billion in 2019, thus registering a EUR 2.6 billion (+19%) increase. On the contrary, spending on co-financed projects decreased substantially in Hungary (EUR -491 million) and Czechia (EUR -294 million). These findings reflect the State of implementation of the European Structural and Investment Funds (ESIF) 2014-2020[1]. Having allocated most of their available funds under the 2014-2020 Multiannual Financial Framework (MFF) in previous years, these Member States are now reducing their co-financed expenditure.

Railways - Subsidies to the rail sector tend to be stable and show an increasing trend in the last years, reaching EUR 50.64 million in 2019. On average, infrastructure aid represents slightly more than half (52%) of all subsidies to railways.

Aid in the context of the financial and economic crisis – Since 2017 and until the COVID-19 outbreak, the economies of all EU Member States had returned to growth and all Member States that had received EU financial assistance during the global financial and economic crisis had successfully exited their economic adjustment programmes. This economic improvement until the COVID-19 outbreak implied a decrease in the notified State aid for the financial sector and a gradual decrease in the amount of aid used by Member States, in particular for bank restructuring.

Aid to agriculture and fisheries – State aid to agriculture has diminished by approximately one third, from EUR 7.6 billion in 2014 to slightly less than EUR 6 billion in 2019. State aid to the fisheries and aquaculture sector remained stable between 2014 and 2019 at around EUR 49 million.

State aid schemes are highly heterogeneous in terms of expenditure – The State aid measures currently in force are very heterogeneous in terms of expenditure. In total, 23 schemes have reported expenditure above EUR 1 billion in 2019, while 169 are above 100 million EUR. For this reason, the 2020 Scoreboard pays particular attention to the five largest State Aid schemes in terms of expenditure and displays data at the scheme level. In particular, the five largest measures account for EUR 31.3 billion expenditure in 2019, i.e. 30% of the total 2019 State aid expenditure[2].

[1] https://cohesiondata.ec.europa.eu/overview

[2] Excluding aid to agriculture, fisheries and railways.

Has the State Aid Modernisation (SAM) reached its objectives? – The 2020 Scoreboard has assessed the implementation of SAM in practice, and its impact on State aid spending, with the following main results:

- **The share of block-exempted measures keeps rising –** As observed in previous Scoreboards, Member States are increasingly using the General Block Exemption Regulation (GBER). 1473 new GBER measures were implemented in 2019, corresponding to 95.5% of the new State aid measures. Leaving aside the largest five State aid schemes, the share of (G)BER in State aid spending (71.8% and 51.8 billion EUR) **is greater than the level of spending for notified cases** (28.8% and 20.3 billion EUR) in 2019[3]. Moreover, by now Member States are implementing large GBER schemes for a wide variety of objectives.

- **Does DG COMP case practice focus on the potentially most distortive aid measures? –** As a result of SAM, the notified cases' median expenditure has increased from around EUR 0.039 million to more than EUR 0.43 million in 2019. Median spending for active State Aid schemes under GBER measures has increased between 2014 and 2019 at a median annual value of EUR 0.012 million in 2014 and EUR 0.82 million in 2019. SAM has therefore allowed the Commission to focus its attention on larger schemes.

- **Has SAM enabled faster decisions? –** Due to the large GBER uptake, State aid measures can be processed much more rapidly, since an increasing share of measures under GBER do not require any decision from the Commission before being implemented.

- **How has State aid spending capacity evolved in the EU?** – It results from the above that overall, Member States' State aid spending capacity has increased in the last six years. On average, the EU28 State aid spending per capita has doubled since 2013 (+99 p.p.). Nevertheless, among Member States that were spending below EU average six years ago, Member States seriously affected by the European sovereign debt crisis, were still spending below EU average in 2019.

[3] Excluding aid to railways, agricultural aid and fisheries.

1. Introduction

The Single Market is one of Europe's major achievements and its most important asset, with its 25 million small, medium-sized and large companies competing to serve almost 450 million consumers. A strong and healthy Single Market is also crucial for the European Union's recovery after the darkest days of the COVID-19 crisis. This vibrant internal market contributes to the long-term competiveness of the EU companies. It will continue to fuel economic growth and to facilitate the daily activities of European businesses and consumers.

Competition is a prerequisite to reap the benefits of the Single Market, to ensure equity and a level playing field among the companies operating in the EU. Healthy competition gives companies incentives to innovate, enter new markets and improve efficiency. As a consequence, a greater variety of choice and lower prices are available for consumers. These factors are also fundamental in order to make European firms more competitive in the global economy.

A company, which receives government support through State aid gains a competitive advantage over the other players in the market. State aid is an advantage conferred on a selective basis to undertakings by public authorities. 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 generally prohibits State aid unless its positive effects outweigh the negative impact of distorted competition. This balancing is more likely to be positive when the aid is aimed at addressing market failures, correcting market inefficiencies. To ensure that this prohibition is respected and exemptions are applied equally across the European Union, the European Commission is in charge of ensuring that State aid implemented by Member States complies with EU competition rules.

The Treaty leaves room for a number of policy objectives for which State aid can be considered compatible. Specifically, in some circumstances, government interventions are necessary for the functioning and equitability of an economy. State aid control therefore does not prevent Member State governments from supporting businesses. State aid control ensures 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.

Over the past half-century, a large body of secondary legislation and guidelines has developed in order to give practical application to these fundamental principles. The rules have evolved to keep pace with economic and technological change, with the emergence of new political priorities (such as increased emphasis on the protection of the environment) and new developments in economic theory. Consequently, EU State aid policy has undergone a number of important changes in recent years.

In particular, since 2013, the Commission has implemented a major reform package, the **State aid Modernisation (SAM)**[4]. The objectives of the State aid Modernisation were threefold: 1) to foster sustainable, smart and inclusive growth in a competitive internal market; 2) to focus the Commission's ex-ante scrutiny on cases with the biggest potential impact on the internal market, and 3) to streamline the rules and provide for faster decisions. One of the key components of SAM is the wider number of categories which fall under the **General Block Exemption Regulation (GBER)**[5] and hence for which aid can

[4] On 8 May 2012, the Commission set out an ambitious State aid reform programme in the Communication on State aid modernisation (COM/2012/0209).

[5] Commission Regulation (EU) N°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 (OJ L 187 26.6.2014, p. 1), amended by Commission Regulation (EU) 2017/1084 of 14 June 2017 (OJ L 156, 20.6.2017, p. 1–18)

therefore be granted without prior notification and approval by the Commission, provided that certain conditions are met. More than 95% of new State aid measures are now implemented by Member States without the need for such prior approval.

At the same time, measures that might seriously harm competition or fragment the Single Market are subject to more careful scrutiny, and a number of new control mechanisms have been introduced, in particular **transparency requirements, the ex-post evaluation** of State aid schemes and **increased monitoring.**

On 7 January 2019, the Commission launched the “fitness check”, an evaluation of the rules adopted during the State aid Modernisation, in line with the Commission's Better Regulation Guidelines[6]. In this exercise, the Commission confirmed that SAM had facilitated the treatment of aid which is well-designed, targeted at identified market failures and objectives of common interest, and least distortive ("good aid"). The “fitness check” also confirmed the overall relevance of the State aid rulebook. It also identified several areas of improvement (including clarifications, further streamlining and simplification) as well as stressed the importance to incorporate the Commission’s priorities, notably as regards the green and digital transitions.

The State Aid Scoreboard is based on State aid expenditure made by Member States until 31.12.2019, and therefore does not cover the COVID-19 crisis[7]. It provides, however, as a key element of the State aid control toolbox, important insights on the impact of the implementation of the SAM reform to feed into the ongoing revision of the State aid rules.

1.1. What is the State aid Scoreboard?

Context – Under Article 6 of Commission Regulation (EC) 794/2004, the European Commission must publish, annually, a State aid synopsis ("State aid Scoreboard" or “Scoreboard”) based on the expenditure reports provided by Member States[8].

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 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.

This 2020 edition includes a more detailed analysis of on the effects and progress of the State Aid Modernisation, based on two focus points:

- To what extent has the State aid Modernisation reached its objectives?

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[6] https://ec.europa.eu/info/law/law-making-process/planning-and-proposing-law/better-regulation-why-and-how/better-regulation-guidelines-and-toolbox_en

[7] On Thursday 19 March 2020, the European Commission adopted a Temporary Framework to enable Member States to support their economy and help overcome the extremely difficult situation triggered by the COVID-19 outbreak. More information about the actions taken by DG Competition in the COVID-19 crisis are available on its website https://ec.europa.eu/competition/state_aid/what_is_new/covid_19.html

[8] Commission Regulation (EC) No 794/2004 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)

- How has State aid spending capacity evolved in the EU?

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 2020 Scoreboard results. **State aid expenditure data gathered by DG Competition is also available on its data repository webpage hosted by EUROSTAT**[9].

1.2. What is the methodology of the State aid Scoreboard?

Scope – The Scoreboard contains primarily information about Member States' expenditure for all existing State aid measures in favour of industries and services (including agriculture and fisheries), 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).

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 aid[10]. Therefore, the data presented in the Scoreboard do not include funding granted under the *de minimis* rules[11].

Furthermore, State aid expenditure data presented in the Scoreboard exclude most of the aid to railways[12], services of general economic interest and schemes approved under the Temporary Framework (TF)[13], for which the corresponding legal bases impose limited reporting obligations on Member States. Railways and crisis aid to the financial sector are covered separately in Sections 3.6 and 3.7.

Data and methodology – The State Aid Scoreboard comprises aid expenditure made by Member States from 1.01.2009 to 31.12.2019 which falls under the scope of Article 107(1) TFEU. State aid data on the EUROSTAT repository webpage includes longer time series, from 1.01.2000 to 31.12.2019. 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**.

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[9] https://webgate.ec.europa.eu/comp/redisstat/databrowser/explore/all/all_themes?lang=en&display=card&sort=category

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

[11] 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)

[12] Subsidies to railways are excluded from the total State aid figures as they 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.;

[13] SGEI package: European Union framework for State aid in the form of public service compensation (OJ C 8, 11.1.2012); 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).

Until 31 January 2020 and the entry into force of the withdrawal agreement[14], the United Kingdom was a Member State of the European Union. It therefore appears as such in the State aid Scoreboard.

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 replaced provisional figures or estimates from previous years by final actual expenditure, in particular, as regards expenditure in tax schemes.

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 spent by the public authority, but measures the economic advantage passed on to the undertaking. More detail on the methodology used in this Scoreboard is provided in Annex I.

[14] Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community (2019/C 384 I/01, OJ C 384I , 12.11.2019, p. 1–177)

2. Recent developments in State aid policy

The State Aid Modernisation – Since May 2012, the Commission has implemented a major reform package, the State aid Modernisation (SAM).

One of the cornerstones of the reform is 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[15]) and for fisheries (FIBER[16]). The SAM reform also modernised several State aid regulations and sectoral guidelines.

Due to the implementation of the new set of State aid rules, 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. **Therefore, a complete toolbox for smart and targeted State aid control striking the right balance between flexibility and responsibility is at the disposal of the European Commission**:

- **Transparency**[17]: since July 1st 2016, aid awards exceeding EUR 500,000 need to be published by Member States on the Transparency Award Module (TAM)[18] or a national or regional register. This aims to ensure discipline, public control and greater accountability;

- **Monitoring**: the European Commission has strengthened its ex-post controls of Member States' compliance with the GBER conditions;

- **Ex post evaluation of large schemes**[19]: the ex-post evaluation of certain large aid schemes is now required both under the General Block Exemption Regulation, when the scheme's annual aid budget exceeds EUR 150 million, and different State aid guidelines.

The Fitness check – On 7 January 2019, the Commission launched an evaluation of the State aid Modernisation rules as required by the Commission's Better Regulation requirements. This evaluation took the form of a "fitness check"[20]. Its aim is to assess whether State aid rules are 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 fitness check covered the General Block Exemption Regulation (GBER), *de minimis* Regulation, the Regional aid Guidelines, the Research, Development and Innovation (RDI) Framework, the Communication on State aid for important projects of common European

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[15] Commission Regulation (EU) No 702/2014 of 25 June 2014 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.

[16] Commission Regulation (EU) No 1388/2014 of 16 December 2014 declaring certain categories of aid to undertakings active in the production, processing and marketing of fisheries 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.

[17] Article 9 and Annex III of GBER, the corresponding provisions of FIBER and ABER, and similar provisions in the related guidelines.

[18] https://webgate.ec.europa.eu/competition/transparency/public/search/home?lang=en

[19] Defined in Article 1(2) GBER and corresponding provisions in the State aid guidelines and Commission staff working document, Common methodology for State aid evaluation (SWD(2014) 179)

[20] The progress of the fitness check can be followed on the Better Regulation Portal: https://ec.europa.eu/info/law/better-regulation/initiatives/ares-2018-6623981_en.

interest (IPCEI), Risk finance, the Airport and aviation Guidelines, the Energy and Environmental Aid Guidelines (EEAG), the Rescue and restructuring Guidelines, but also the Railways Guidelines[21] and the Short-term export-credit Communication[22] (the latter two not part of the 2012 SAM package).

The Fitness Check is an "umbrella exercise", its scope comprises a group of interventions and is not a mere sum of individual evaluations of the individual rules. The Fitness Check aimed at assessing SAM as a whole as well as cross cutting, common features of the individual rules, while also focusing on selected issues which are deemed of importance based on the Commission's case practice.

In addition to the results of a stakeholder consultation, the "fitness check" took account of evidence gathered via studies, monitoring results, evaluation reports, the Commission's extensive case practice and internal statistics. The analysis suggested that the SAM as a whole has resulted in an effective State aid architecture. SAM seems to have largely achieved its triple objective, and in particular, through the objective of "good aid", State resources are channelled to where it really matters.

However, the individual rules need revision and/or update, including clarifications, further streamlining and simplification, as well as adjustments to reflect recent legislative developments, current priorities, market and technology developments. The rules should also be aligned to future challenges and Commission priorities. This is in particular important as State aid can, and should, contribute to the Green Deal, as well as the Digital and Industrial Strategies.

- The implementation of the common assessment principles seems to have led to a clearer methodological framework for the various State aid rules contributing to the achievement of the objective of fostering "good aid".

- As regards the General Block Exemption Regulation, while there might still be scope for a further increase of expenditure under the current block-exemption rules in the coming years, in line with the approach to focus on cases with a big impact on competition, the current system also ensures that the Commission keeps examining a limited number of measures involving large amounts which have to be notified.

The revision of the State aid rules – The State aid rules need to be aligned to future challenges, in line with the Commission's priorities.

While State aid is, foremost, a competition instrument it also has a vital role for promoting the European Green Deal, as well as the EU's Digital and Industrial Strategies. In particular, the ongoing revision of the energy and environmental rules will aim to facilitate a modern decarbonised and circular economy, while ensuring limited distortions of competition and adequate safeguards to the integrity of the single market.

This is key, given budgetary constraints combined with the necessity to support the recovery of the EU economy in the aftermath of the coronavirus crisis.

The General Block Exemption Regulation, which allows for direct implementation of State aid projects by Member States without the need of a prior notification to the Commission, will be amended twice in the near future. The first revision, in the context of the new MFF, will be adopted before the summer break and aims at facilitating national funding provided in the context of the next Multiannual Financial Framework. The rules on EU funding and the relevant State aid rules will be aligned to avoid unnecessary complexities, while at the same time preserving competition in the Single market. The revision will also allow for new possibilities for Member States to speedily provide aid for the recovery from the COVID-19

[21] Community guidelines on State aid for railway undertakings (2008/C 184/07).

[22] Communication from the Commission to the Member State on the application of Articles 107 and 108 of the Treaty on the Functioning of the European Union to short-term export-credit insurance (2012/C 392/01).

pandemic. These new possibilities concern aid for energy efficiency in buildings, low emission mobility and broadband.

As State aid rules are a vital part of the twin, green and digital, transition, the Commission aims to review most of the relevant State aid guidelines by the end of 2021. These include not only the Environmental and Energy Guidelines but also the Regional aid Guidelines (revised guidelines already published), the Communication on Important projects of common European interest, the Framework on Research, Development and innovation and the Risk Finance Guidelines. The revision of this package of Guidelines will be accompanied by a review of the corresponding parts of the General Block Exemption Regulation.

In addition, the implementation of the Digital Strategy relies on state-of-the-art networks. Therefore, the Commission is also reviewing the State aid rules for Broadband.

Other rules will be reviewed in the medium term. Pending the conclusion of the revision of the State aid rulebook, the validity of the current State aid rules has been prolonged[23].

[23] Communication from the Commission concerning the prolongation and the amendments of the Guidelines on Regional State Aid for 2014-2020, Guidelines on State Aid to Promote Risk Finance Investments, Guidelines on State Aid for Environmental Protection and Energy 2014-2020, Guidelines on State aid for rescuing and restructuring non-financial undertakings in difficulty, Communication on the 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, Communication from the Commission – Framework for State aid for research and development and innovation and Communication from the Commission to the Member States on the application of Articles 107 and 108 of the Treaty on the Functioning of the European Union to short-term export-credit insurance (2020/C 224/02).

3. Overall trends of State aid expenditure

3.3. Total State aid expenditure has kept increasing in 2019

According to the national expenditure reports for 2019[24], Member States spent **EUR 134.6 billion**, i.e. **0.81% of GDP**, on State aid at European Union level, excluding aid to agriculture, fisheries and railways. This amount represents a nominal increase of about 3.6% compared to 2018 expenditure (**EUR +4.7 billion**) and an increase of about 0.001 p.p. of GDP in relative terms.

Figure 1: Total State Aid expenditure, excluding aid to agriculture, fisheries and railways, as % of national GDP by Member State

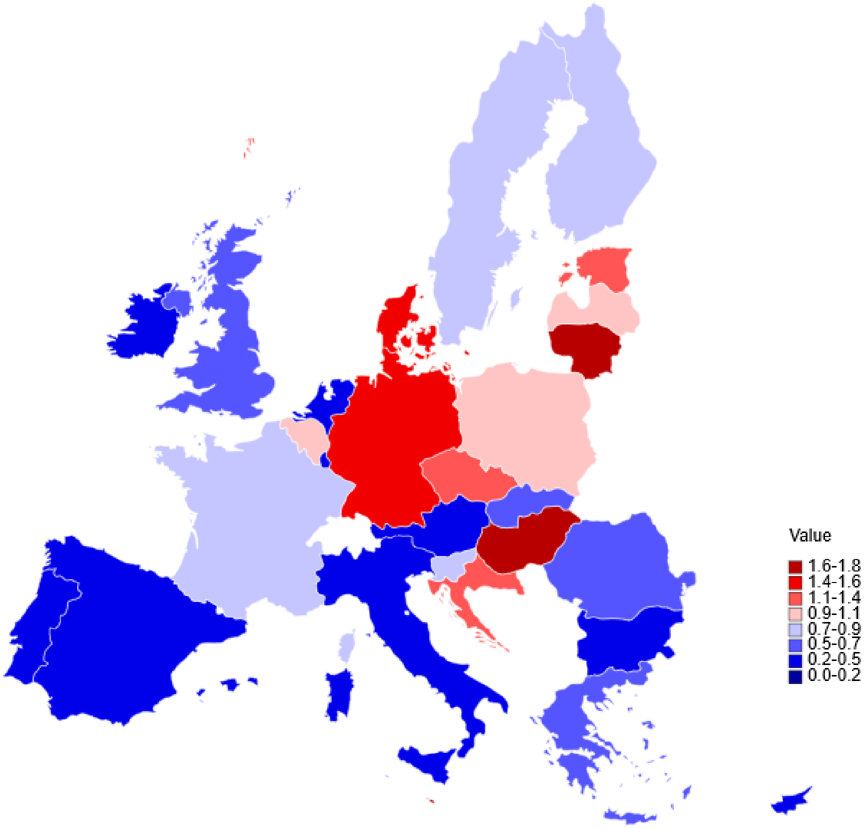
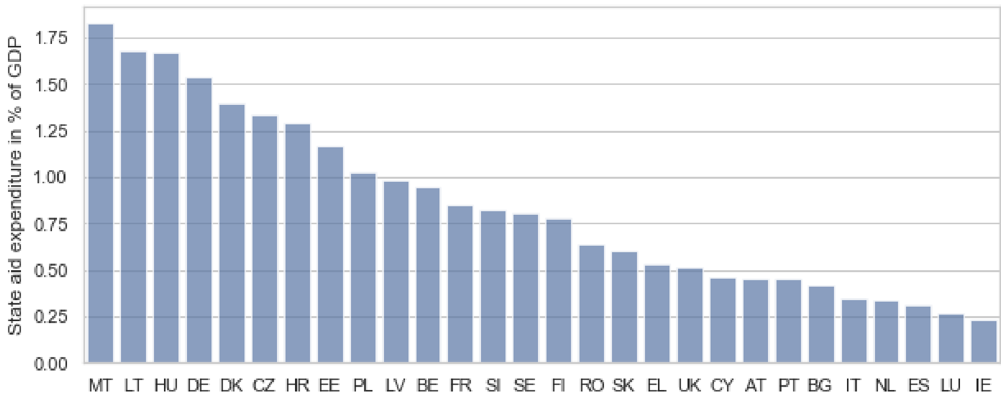


Figure 2: Total State Aid expenditure, excluding aid to agriculture, fisheries and railways, as % of national GDP by Member State



[24] Submitted in conformity with Article 6(1) of Commission Regulation (EC) 794/2004

Looking at the distribution of **State aid expenditure at the Member State level as a share of national GDP** (Figure 1 and Figure 2), there is a significant spending dispersion across Member States. The Member States spending the most, spend around 1.6-1.8 percent of their national GDP (**Malta, Lithuania** and **Hungary**), while the Member States spending the least, spend around 0.2-0.3 percent of GDP (**Ireland, Luxembourg** and **Spain**).

In **nominal terms**, State aid spending has been increasing since 2014. In **relative terms**, overall **State aid expenditure as a share of EU GDP** has remained stable in the last two years (+ 0.001 p.p. of GDP between 2018 and 2019).

As represented in Figure 3, in **absolute terms**, the Member State spending the most in 2019 is **Germany** with EUR 53 billion in 2019, representing 39% of EU total State Aid expenditure. The Member State spending the least in 2019 is **Cyprus** with EUR 104 million. A positive trend is observable for most of EU-28 Member States in State Aid spending over the last two decades, with the exception of: **Spain, Italy, Portugal, Greece, Latvia, Bulgaria** and **Cyprus.** Overall, in the last 10 years the **State aid expenditure of EU-28 Member States** has doubled in size (EUR 68 billion in 2010). Significant State Aid expenditure increase since 2010 can be observed for: **Estonia** (nineteen-fold increase), **Bulgaria** (twelve-fold increase), **Lithuania** (eight-fold increase) and **Romania** (six-fold increase).

Figure 3: State Aid expenditure from 2000 to 2019, excluding aid to agriculture, fisheries and railways, by Member State, in EUR billion

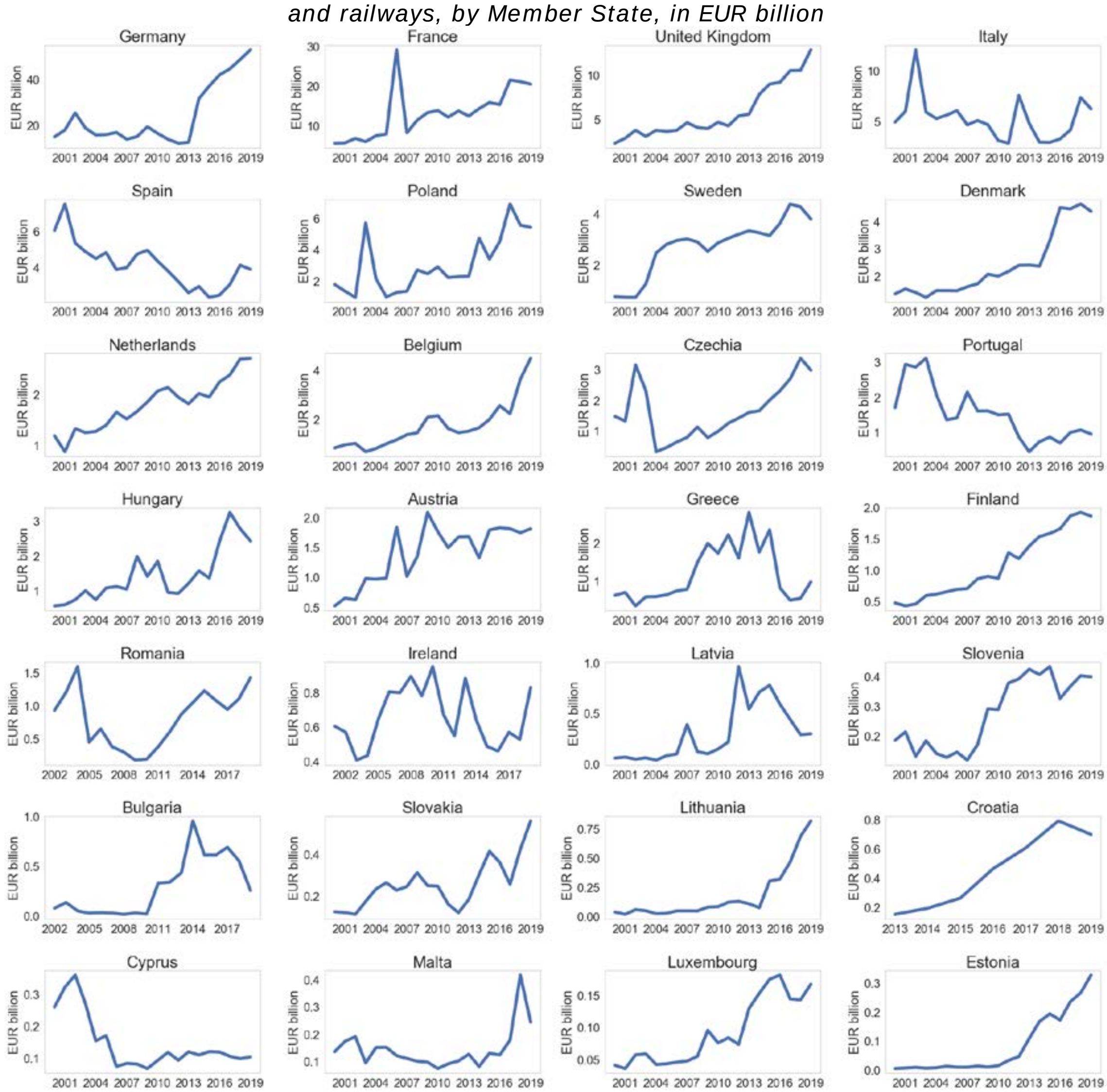
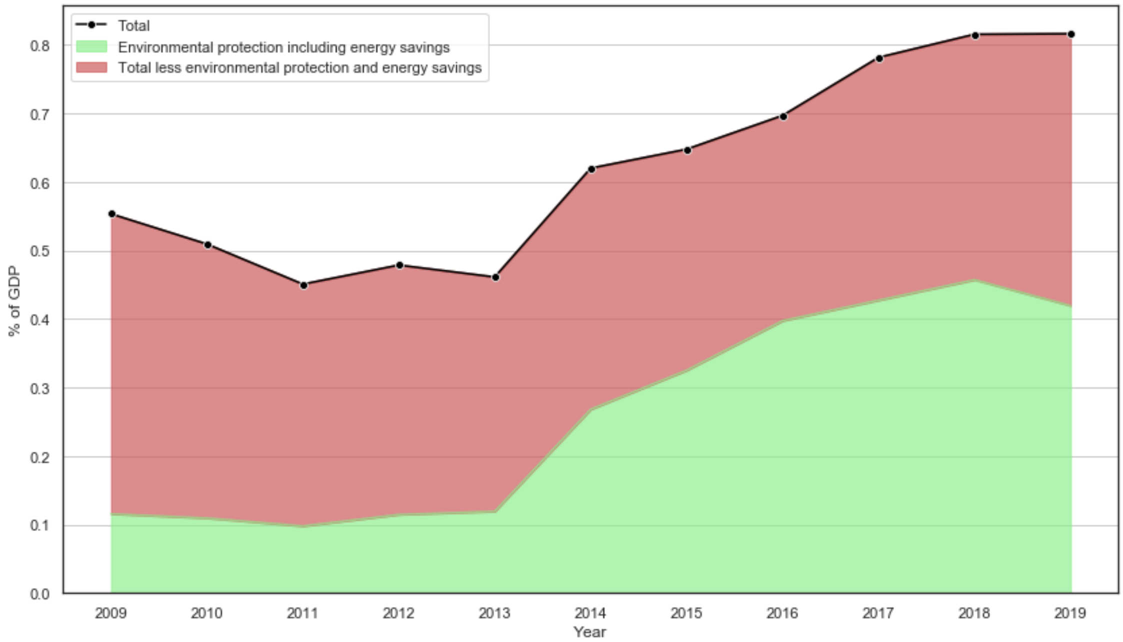


Figure 4: Total State Aid expenditure, excluding aid to agriculture, fisheries and railways, as % of EU 28 GDP

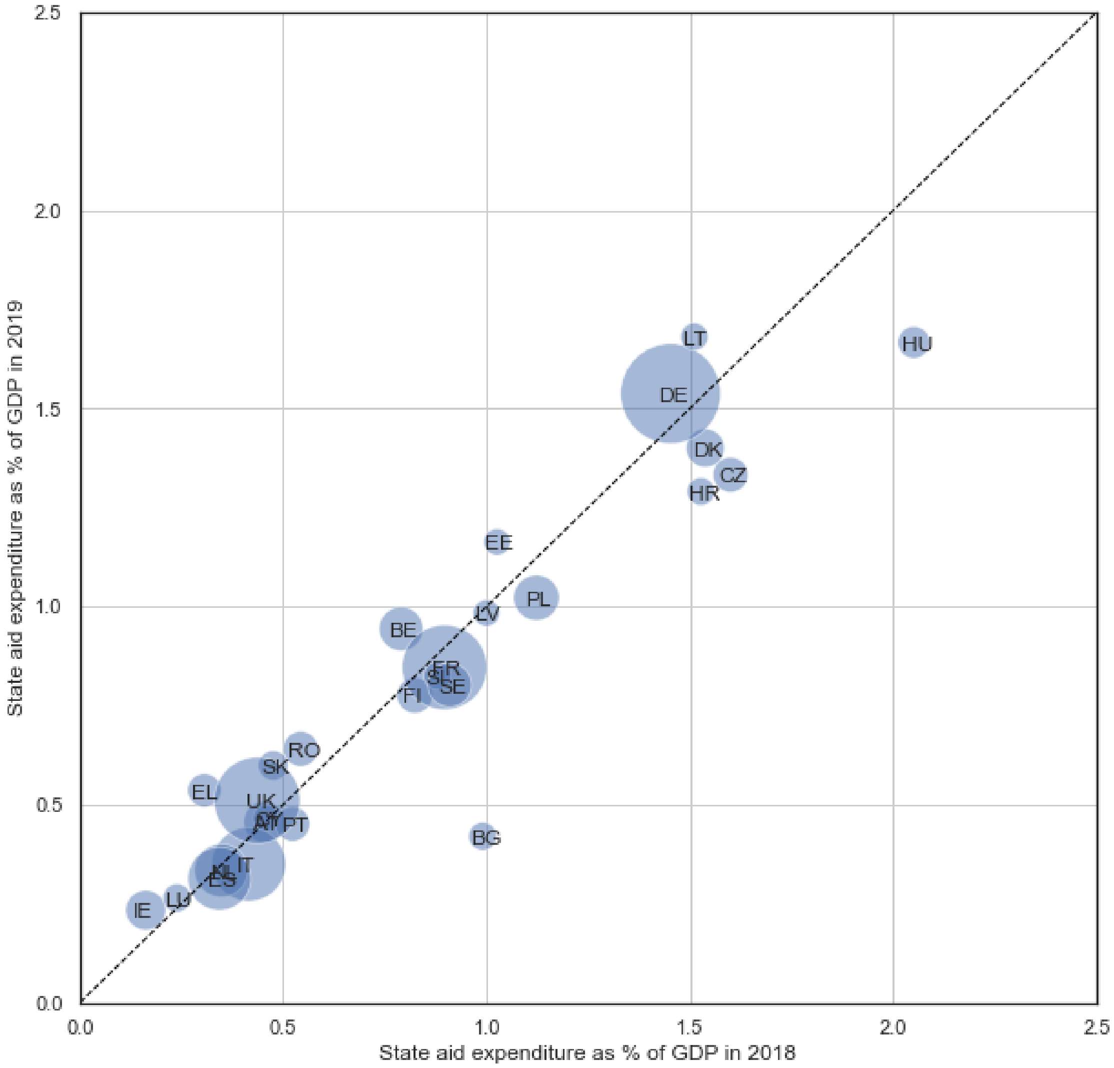


As shown in Figure 4, a large part of the increase registered since 2014 is due to a sharp increase in spending for environmental protection and energy savings (green stacked area), mainly driven by the inclusion of several specific renewable energy scheme.

In 2019, spending was reported for **4414 active measures, of which a large majority were schemes** (71%). Among them, **1542 are new measures (35%)**. **About 51% of total spending** (69.1 billion EUR), excluding aid to agriculture, fisheries and railways, **was attributed to State aid to environmental and energy savings**. For all other objectives, Member States spent about **EUR 67.3 billion**, i.e. **0.4% of GDP**, on State aid at European Union level.

As regards both the levels and changes in total expenditure, there are **large differences between Member States**. Figure 5 reports expenditures in 2018 (x axis) and in 2019 (y axis) as a percentage of national GDP. Member States above the 45 degrees line reported an increase in total State aid expenditure in proportion to its GDP in 2019 as compared to 2018, those below a decrease. The highest **increase** in expenditure between 2018 and 2019 was recorded in **Greece** (+0.22 p.p. of GDP). For **Belgium**, we observe an increase of +0.15 p.p. of GDP. Member States that joined the EU after 2004, e.g. **Lithuania** (+0.17 p.p. of GDP), **Estonia** (+0.13 p.p. of GDP), **Slovakia** (+0.12 p.p. of GDP) and **Romania** (+0.09 p.p. of GDP) also recorded significant increases. On the contrary, a substantial **reduction** in State aid expenditure relative to the GDP has been observed in other Member States that also joined the EU after 2004, such as **Malta** (-1.51 p.p. of GDP) and, to a lesser extent, in **Bulgaria** (-0.57 p.p. of GDP), **Hungary** (-0.38 p.p. of GDP) and **Croatia** (-0.26 p.p. of GDP).

Figure 5: Total State Aid expenditure, excluding aid to agriculture, fisheries and railways, as % of GDP in 2018 and 2019



N.B. The size of the dots is proportional to the 2019 GDP of the Member States. Malta is an outlier and therefore not displayed on this figure for layout reasons. Malta's State aid expenditure as percentage of GDP was 3.34% in 2018 and 1.82% in 2019.

3.4. Total State aid expenditure by policy objectives: environmental aid remains the main policy focus of Member States

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). When a measure contributes to a well-defined common interest objective, referred to as "policy objective", that effect should be taken into account in the balancing test. However, in practice various State aid measures are often complementary and some of them might contribute to several objectives[25].

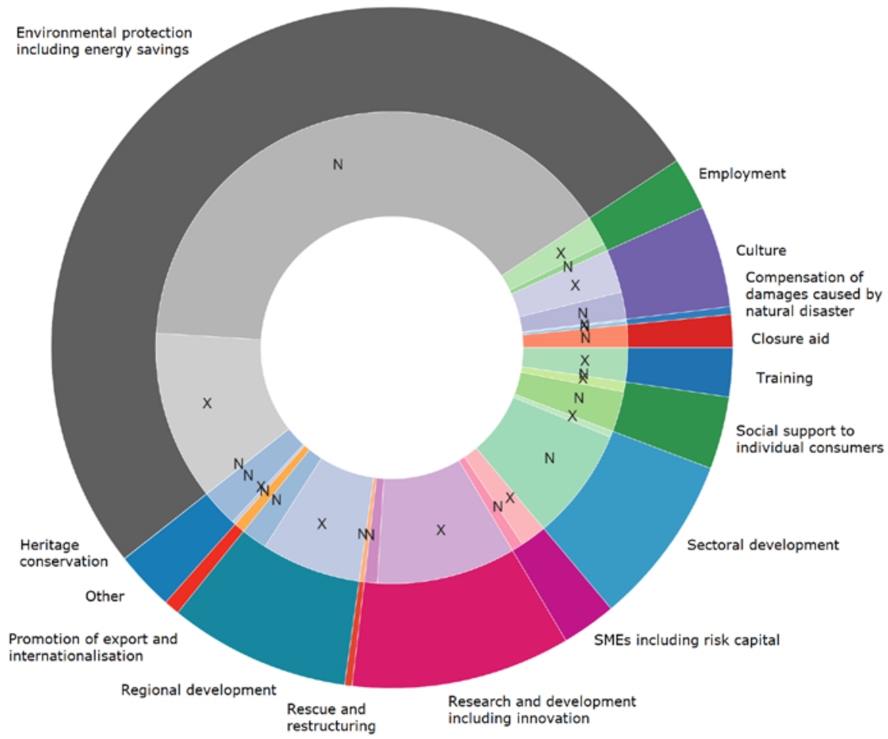
At EU level in 2019, as depicted in Figure 6 and Figure 7, more than half (51%) of all spending, i.e. EUR 69.1 billion corresponding to 0.42% of EU 28 GDP, is allocated to **environmental protection and energy savings.** 78% of State Aid spending dedicated to environmental protection and energy savings has been notified (N), resulting in only 22% of the measures following procedures under block exemption regulation (X). **Research and development including innovation** represents 10% (EUR 13.9 billion) of total spending,

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

while **Regional Development** represents 8.5% (EUR 11.5 billion). Both of the aforementioned policy objectives' measures were registered mainly under block exemption regulation in 2019, namely 91% for Research and development including innovation and 79% for Regional Development. **Sectoral development**[26], made up 8.1% (EUR 10.9 billion) the total expenditure.

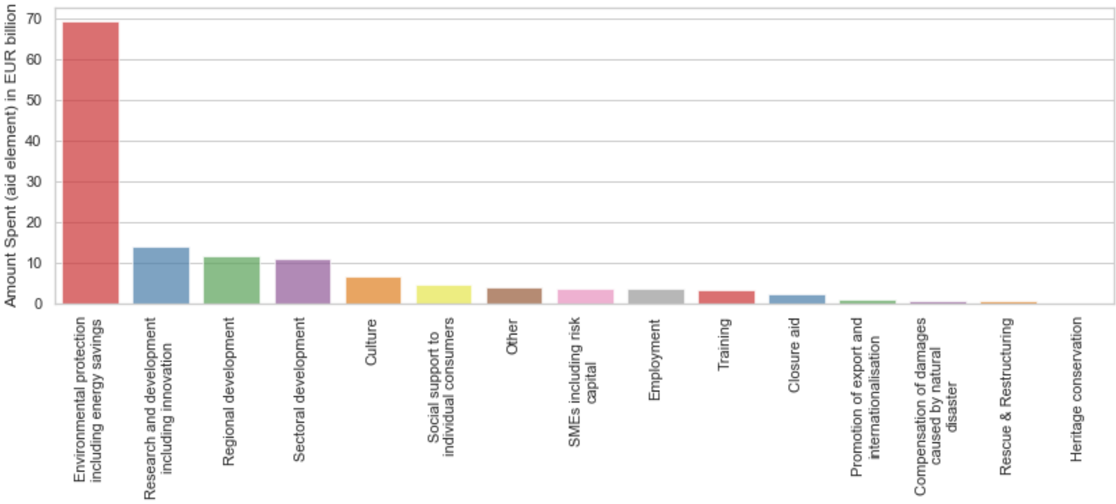
These 4 biggest policy objectives, therefore, make up almost 80% of total State aid spending in 2019.

Figure 6: Total State Aid expenditure, excluding aid to agriculture, fisheries and railways, by policy objective in 2019



[26] This objective includes a large variety of measures, across different sectors and for various purposes (*i.a.* investment for port and airport infrastructure, aid for press and television, etc.).

Figure 7: Total State Aid expenditure, excluding aid to agriculture, fisheries and railways, by policy objective in 2019



In relative terms, Germany, Denmark and Malta are the Member States spending the most on **environmental protection and energy savings** measures, namely 1.12%, 0.91% and 0.9% of national GDP respectively. They are followed by Czechia, Latvia, Lithuania, Sweden, Finland, Estonia, Romania and Slovenia which are all above the EU 28 average. The map and graph below (Figure 8 and Figure 9) display the State aid expenditure dispersion in Environmental protection and energy savings by Member State.

Figure 8: State aid expenditure in Environmental protection and energy savings by Member State, as % of national GDP in 2019

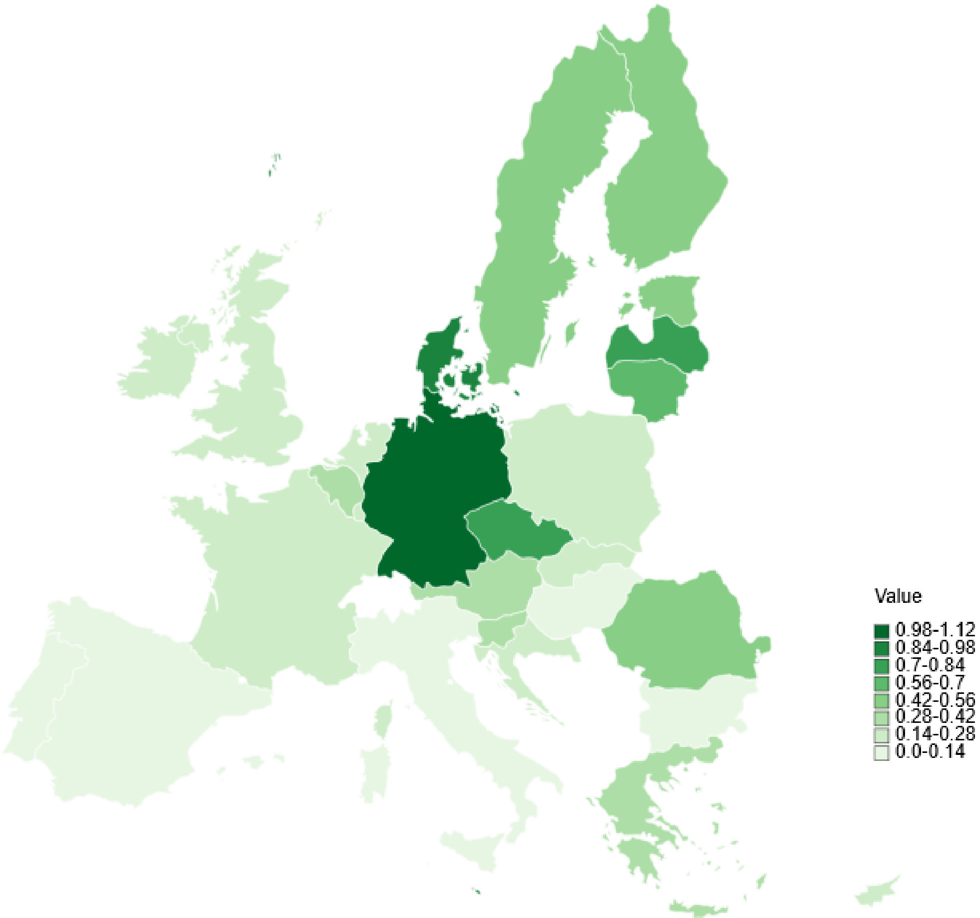
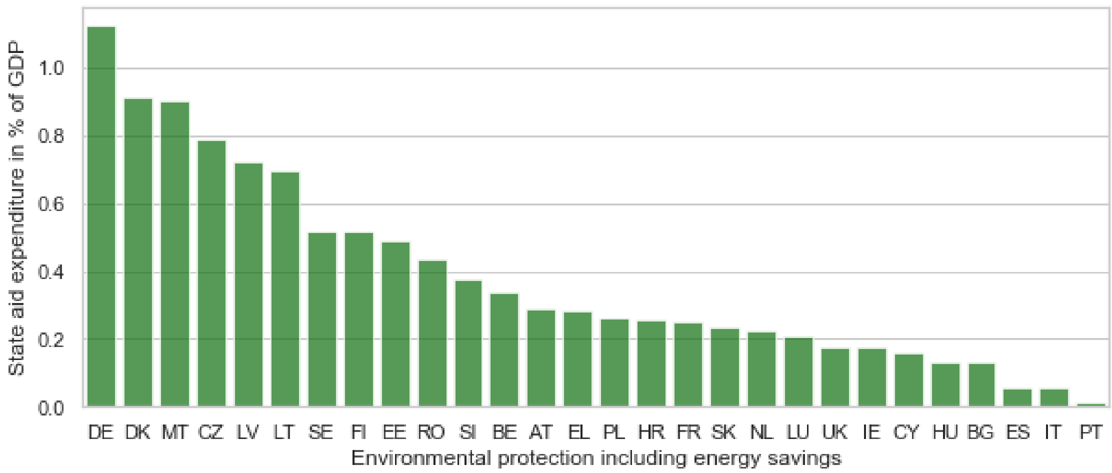


Figure 9: State aid expenditure in Environmental protection and energy savings by Member State, as % of national GDP in 2019



Belgium spent around 0.25% of its GDP on **research, development and innovation** measures. Out of the total State Aid expenditure in R&D&I for Belgium, 41% was spent under the GBER. Poland and Czechia come next, but with slightly lower spending, around 0.21% of their respective GDPs (Figure 10 and Figure 11).

Figure 10: State aid expenditure in R&D&I by Member State, as % of national GDP in 2019

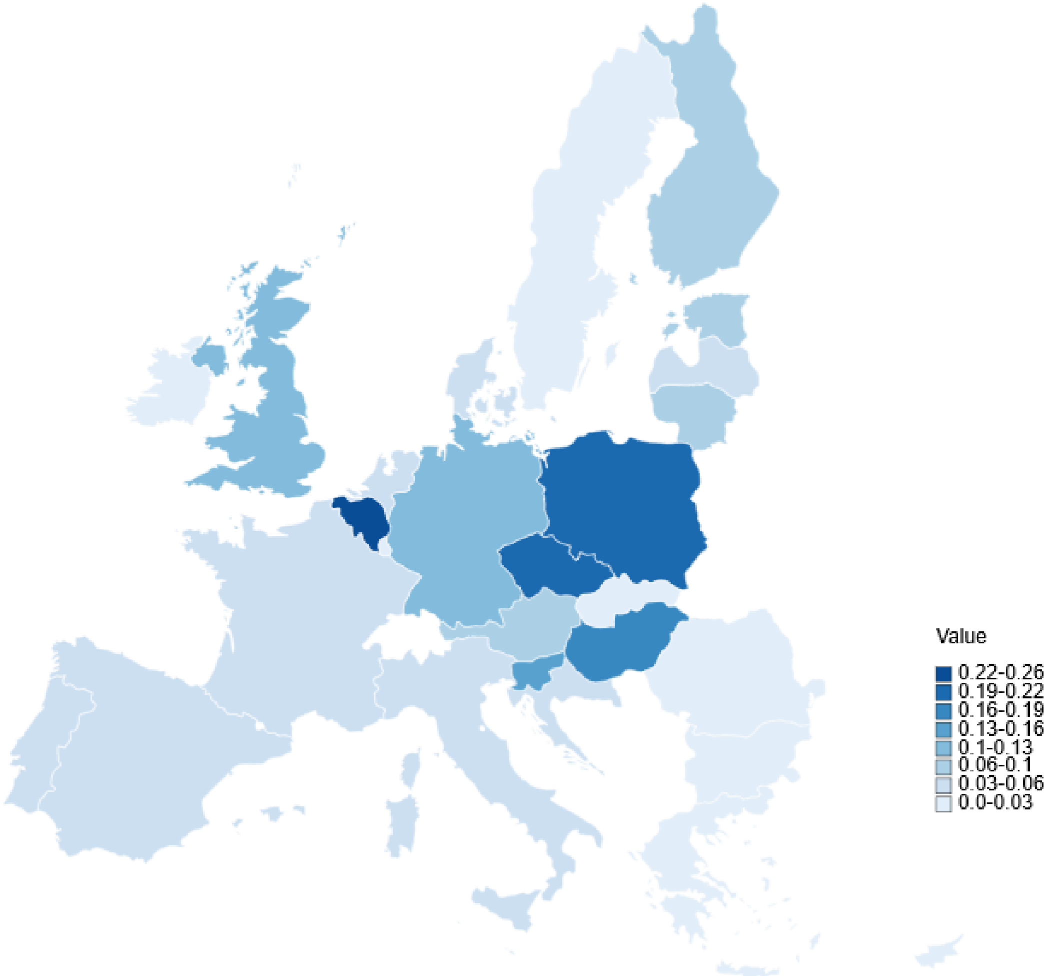
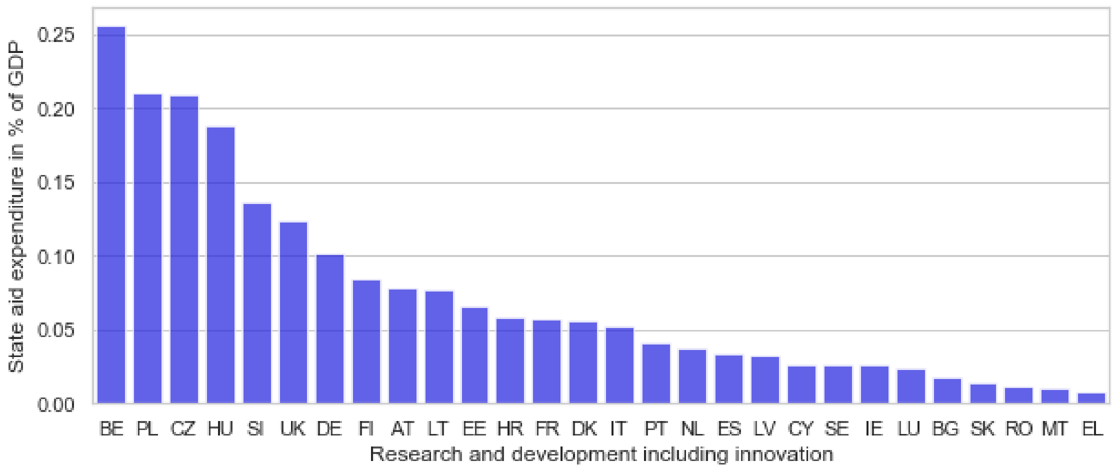


Figure 11: State aid expenditure in R&D&I by Member State, as % of national GDP in 2019



Regional development represents a significant share of State aid expenditure in Hungary (0.6% of national GDP), as displayed in Figure 12 and Figure 13. Most importantly, for Hungary, 100% of its Regional development aid is spent under the GBER in 2019. The next ranked Member States – Poland, Portugal, Slovakia and Malta account for less than half of Hungary's share (below 0.3% of GDP).

Figure 12: State aid expenditure in Regional development by Member State, as % of national GDP in 2019

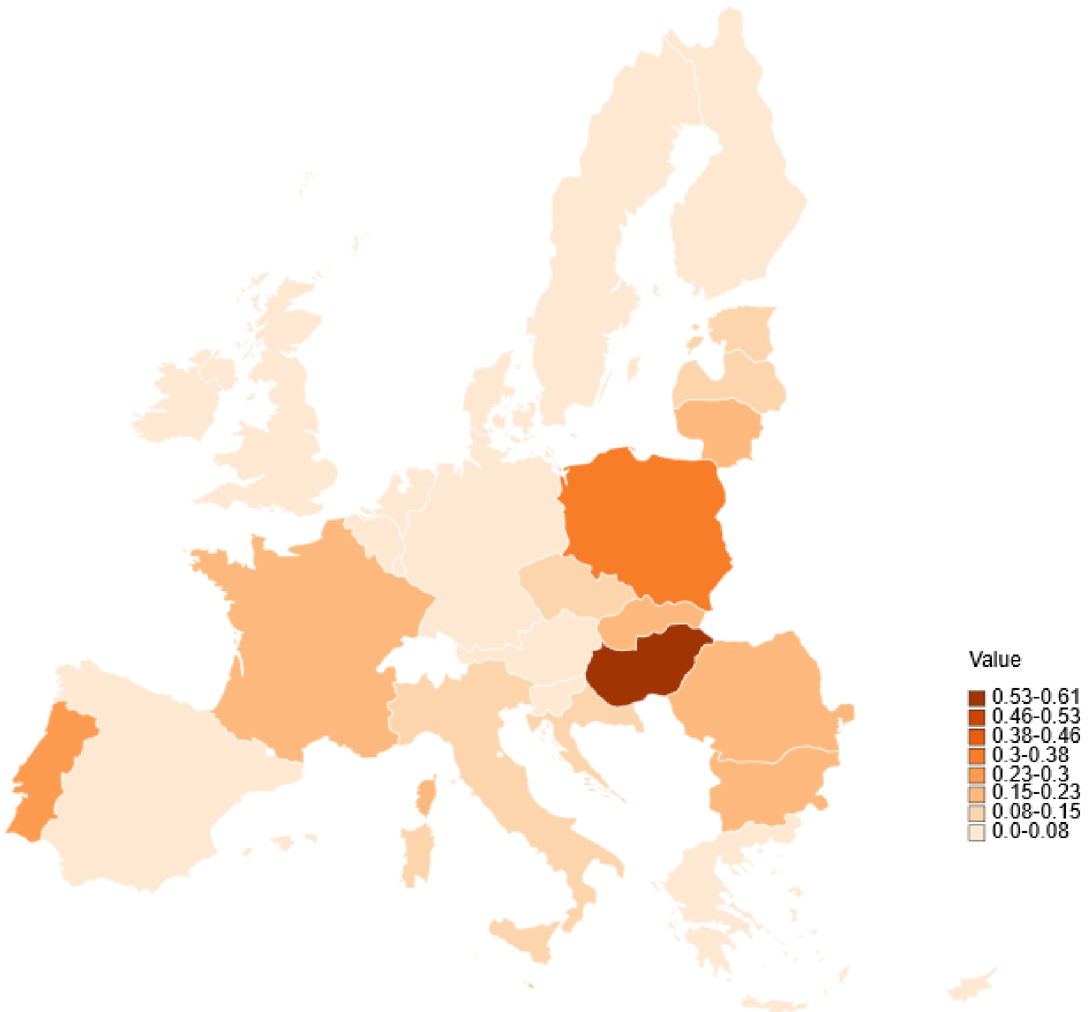
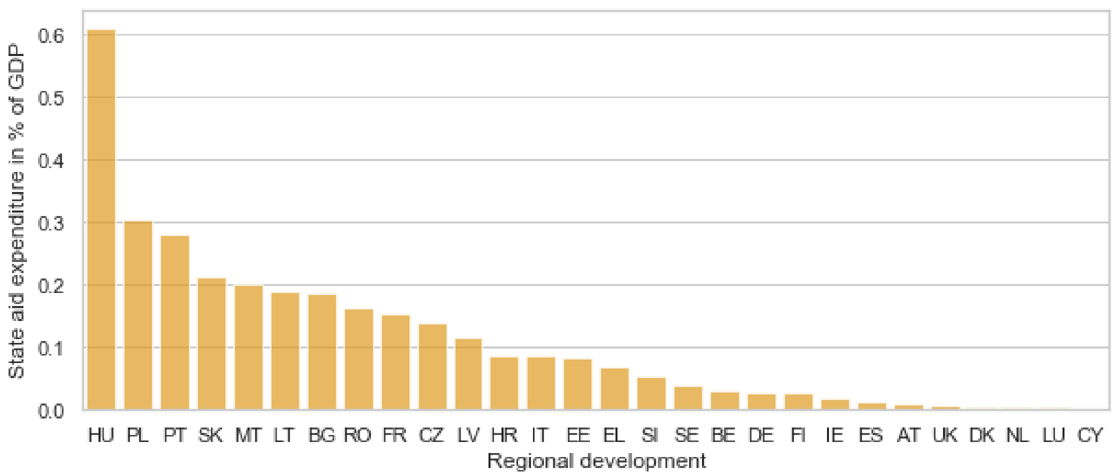


Figure 13: State aid expenditure in Regional development by Member State, as % of national GDP in 2019



Hungary is the Member State with the relative largest share (0.19% of GDP) of State aid expenditure in **Sectoral development** (see Figure 14 and Figure 15), mainly due to a measure concerning the production of electricity, followed by Germany (0.16% of GDP) whose expenditure is concentrated in a measure providing support to the implementation of a national cycling plan.

Figure 14: State aid expenditure in Sectoral development by Member State, as % of national GDP in 2019

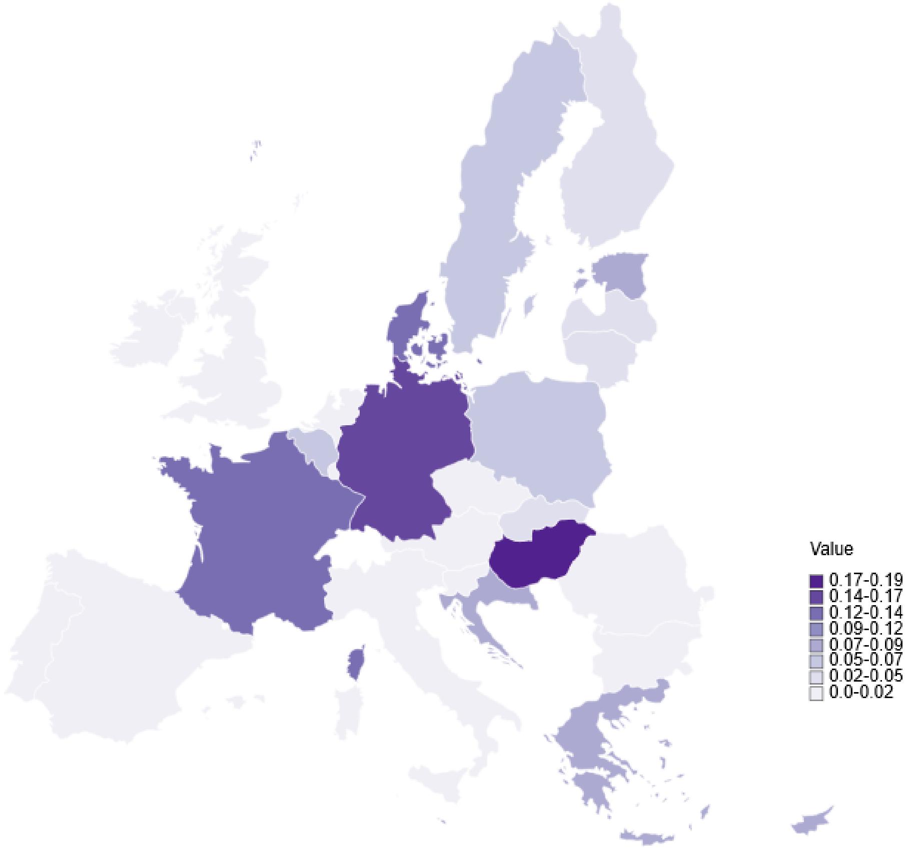
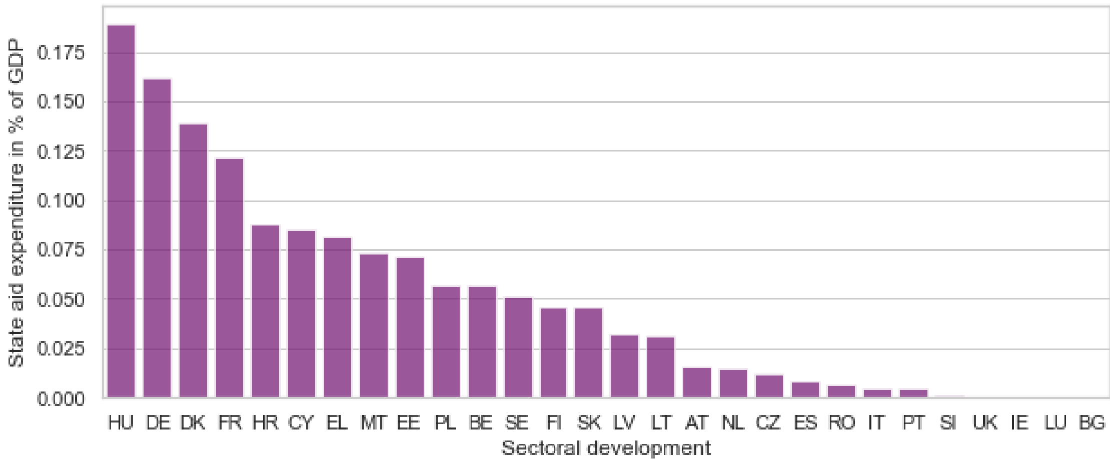
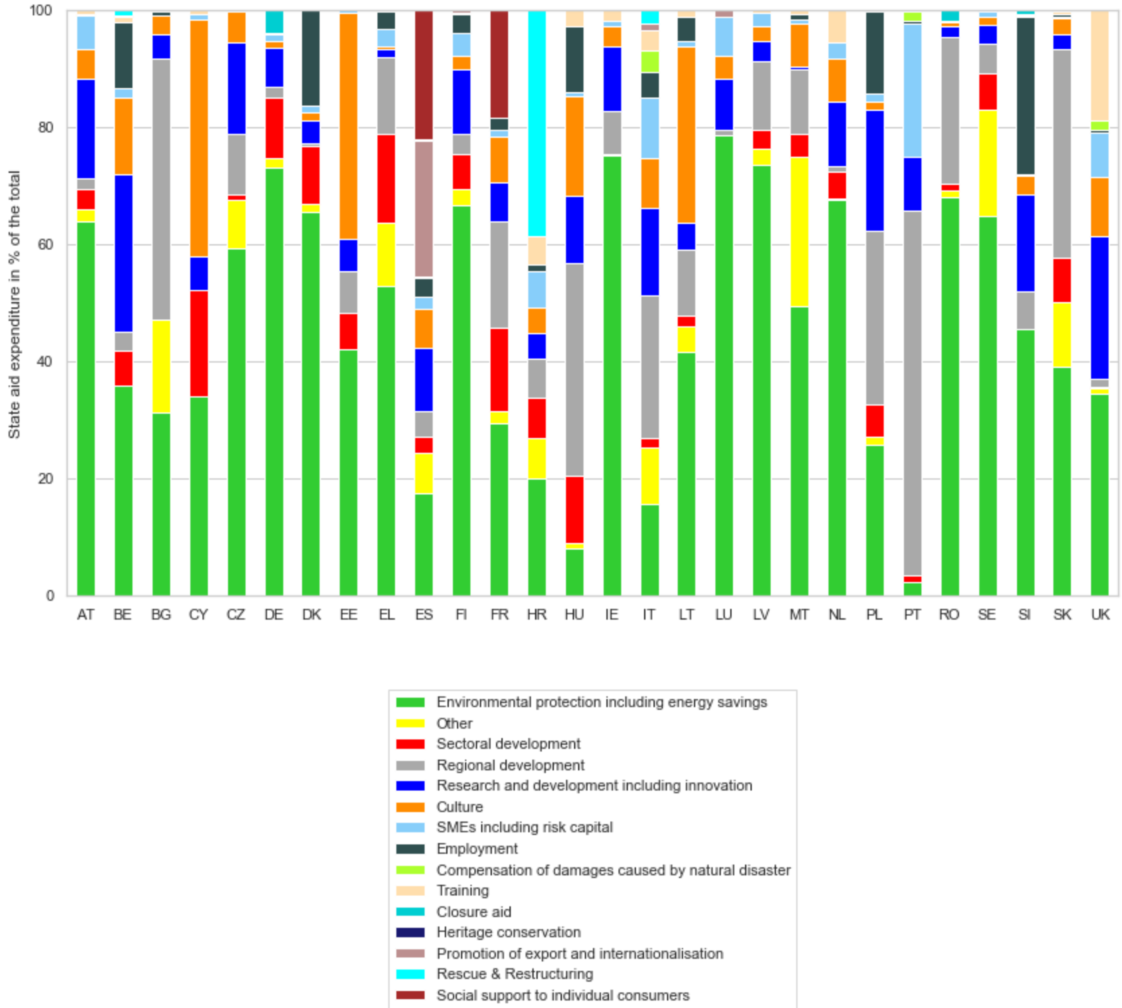


Figure 15: State aid expenditure in Sectoral development by Member State, as % of national GDP in 2019



As the previous figures have demonstrated, Member States grant State aid for rather diverse objectives. Figure 16 shows the 2019 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 16: Share of State aid expenditure, excluding aid to agriculture, fisheries and railways, by Member State in 2019 (in %)



As regards the three prime objectives at EU level:

- **Environmental protection and energy savings** is the prime objective in 19 Member States. It represents more than 50% of total spending in 11 Member States: Luxembourg, Ireland, Germany, Romania, the Netherlands, Finland, Denmark, Sweden, Austria, Czechia and Greece;

- **R&D&I** is the second most important objective in Belgium, Austria, Czechia, the Netherlands, Ireland, Finland and Luxembourg;

- **Regional development** is the prime objective in Portugal, Bulgaria, Hungary, Poland and Italy;

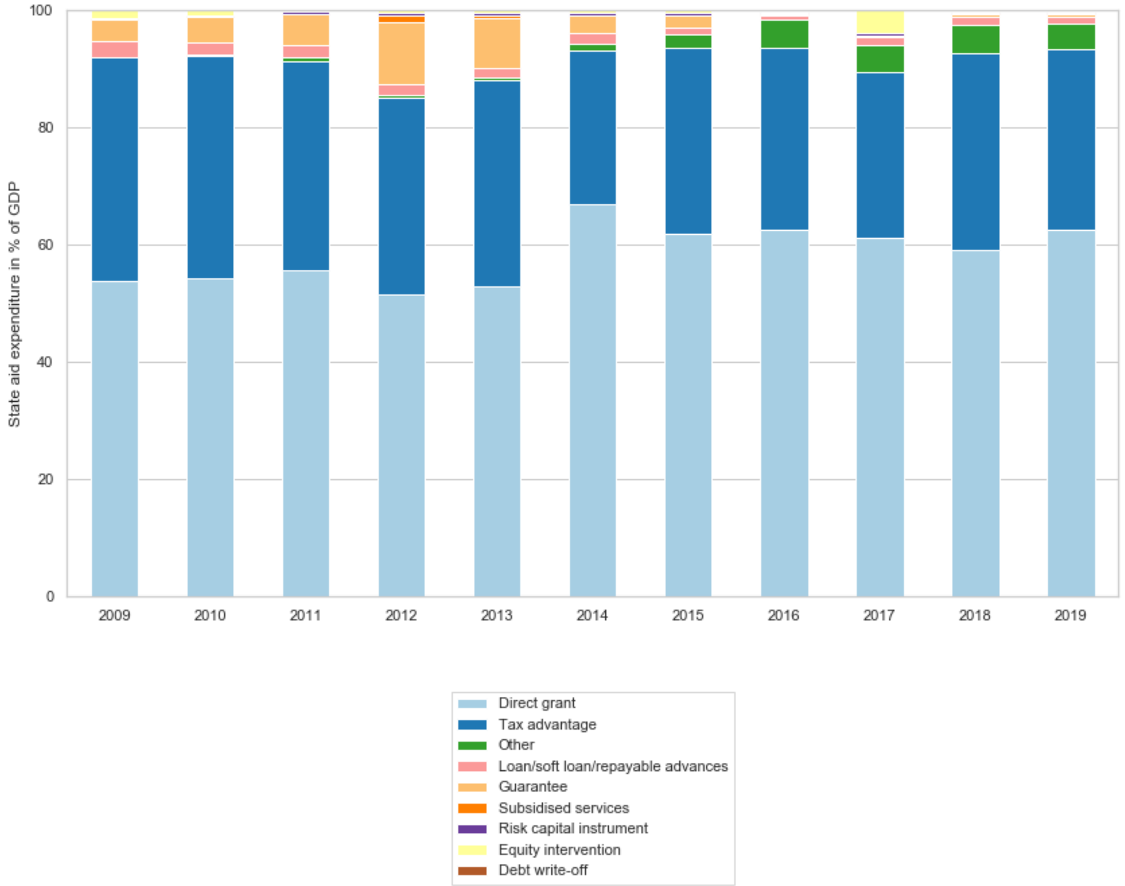
In some Member States, the three largest objectives, accounting for 70% of overall expenditure at EU level, represent a minor share of State aid spending at national level. This is in particular the case of **Croatia**, where these objectives only represent around 31% of total spending, while Regional development is the prime objective. Moreover, in **Spain** a large share of national resources is channelled to Promotion of export and internationalisation (23% of spending). Sectoral development is the prime objective in **Latvia**, while **Cyprus** has devoted more than 40% of its 2019 State aid expenditure to Culture.

3.5. Total State aid expenditure by instrument: different practices across Member States

State aid can take numerous forms, *i.a.* direct grants, tax advantages (exemptions, reductions or deferrals), equity investments, soft loans/repayable advances, or guarantees. The choice of the most appropriate aid instrument should normally be 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 2009 to 2019 (see Figure 17), **direct grants**[27] are by far the most popular aid instrument in 2019, representing 62.8% of total expenditure, and even grew increasingly popular over time (compared to 52.8% in in 2013). In 2019, **tax exemptions/reductions/deferrals** represented a lower share of total spending (30.7% of total expenditure) than in the past (2009, 38% and 2013, 35.2%). Since 2012, the share of spending in the form of **guarantees** has decreased, while the use of **other State aid** instruments has increased (the residual category 'other' represents 4.4% of total spending in 2019). **Equity interventions** have been used for large amounts in 2017 only.

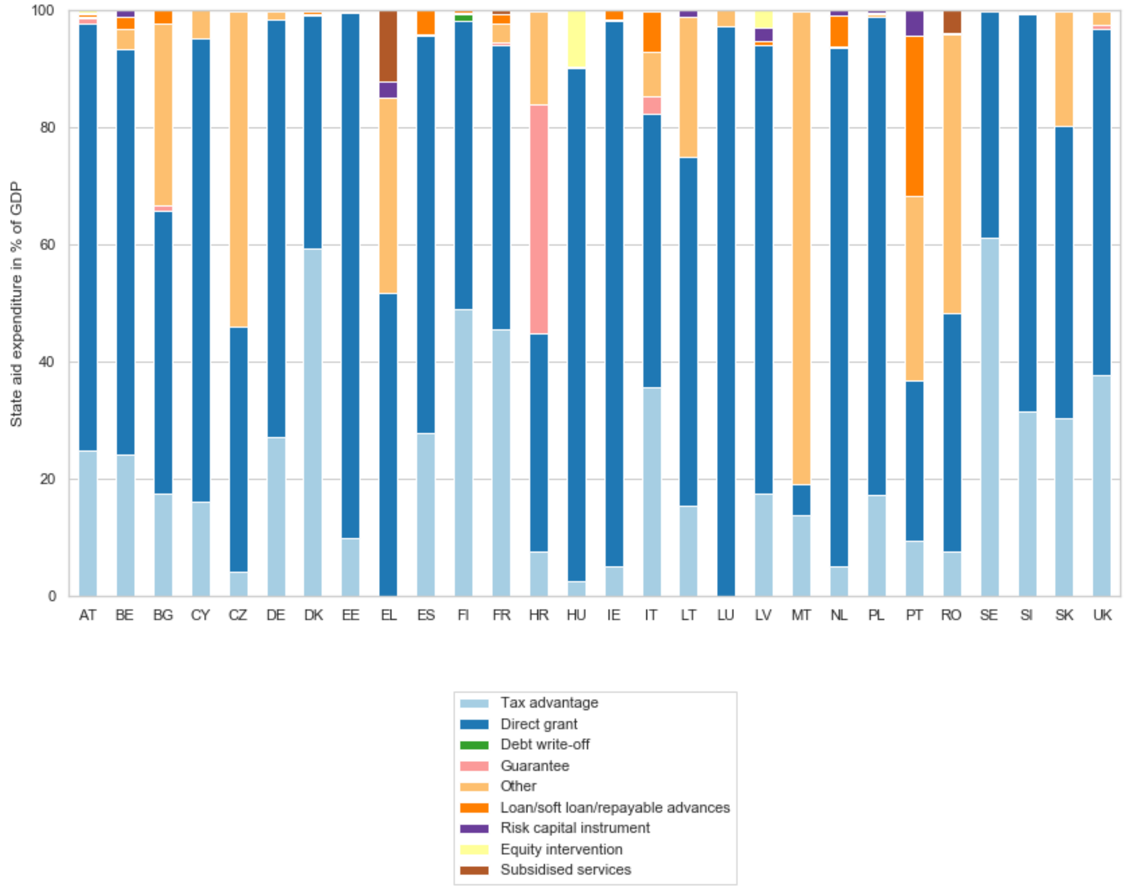
Figure 17: Share of total State Aid by aid instrument, excluding aid to agriculture, fisheries and railways (in %)



Practices among Member States largely differ: direct grants cover less than 50% of State aid expenditure in 12 Member States (Malta, Portugal, Croatia, Sweden, Denmark, Romania, Czechia, Italy, Bulgaria, France, Finland and Slovakia), see Figure 18. Guarantees accounted for more than 39% of Croatia's 2019 State aid expenditure.

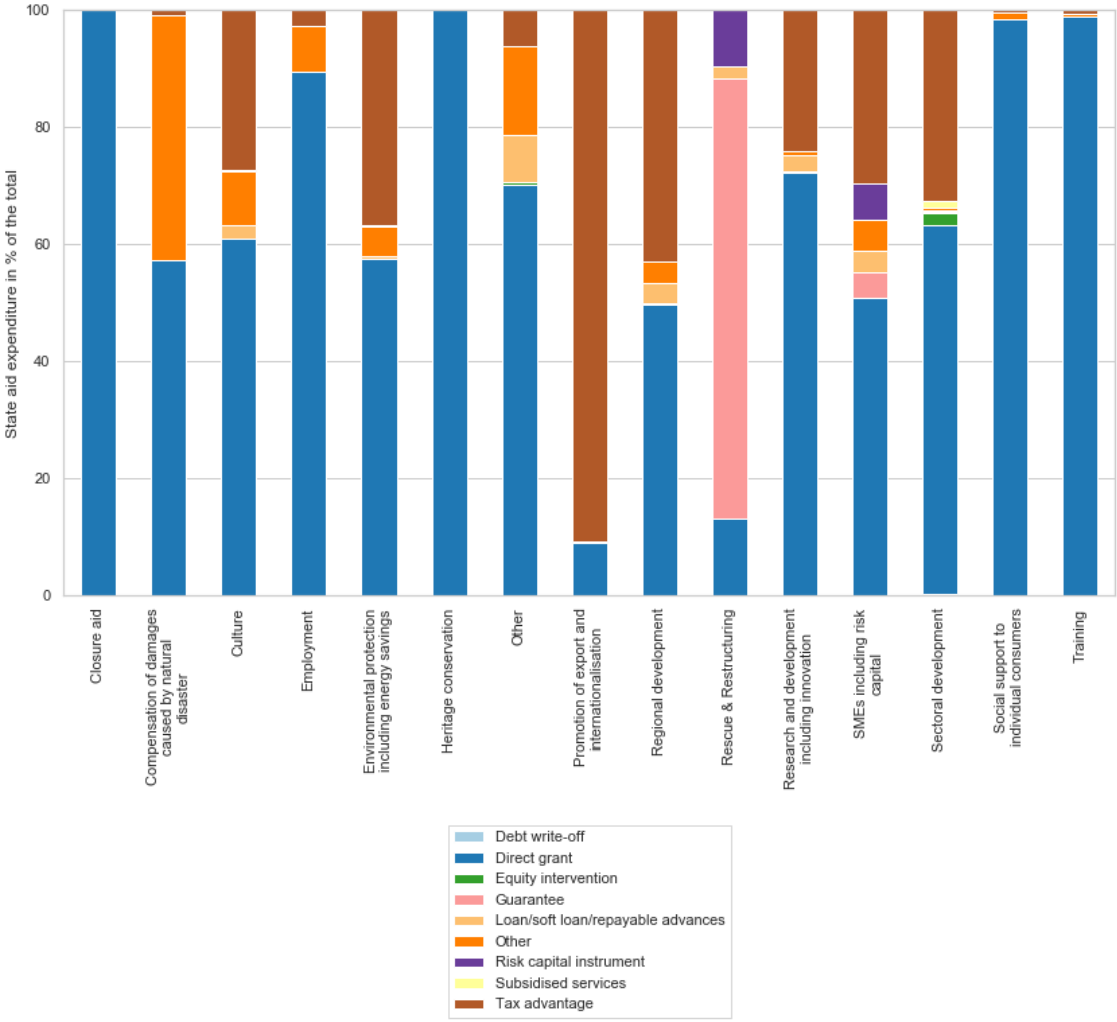
[27] Including interest subsidies.

Figure 18: Share of total State aid expenditure, excluding aid to agriculture, fisheries and railways, disbursed by instruments in 2019 (in %)



Looking at the use of aid instrument by policy objective, direct grants (including interest rate subsidies) accounted for approximately 10% of total aid spent for specific objectives e.g. promotion of export and internationalisation or rescue and restructuring, and more or less 50% for SMEs including risk capital or regional development (see Figure 19). On the contrary, 100% of the aid was disbursed through direct grants and interest subsidies for closure aid and heritage conservation.

Figure 19: Share of total State aid expenditure, excluding aid to agriculture, fisheries and railways, disbursed through direct grants (including interest subsidies) and other instruments by main policy objectives, in 2019 (in %)

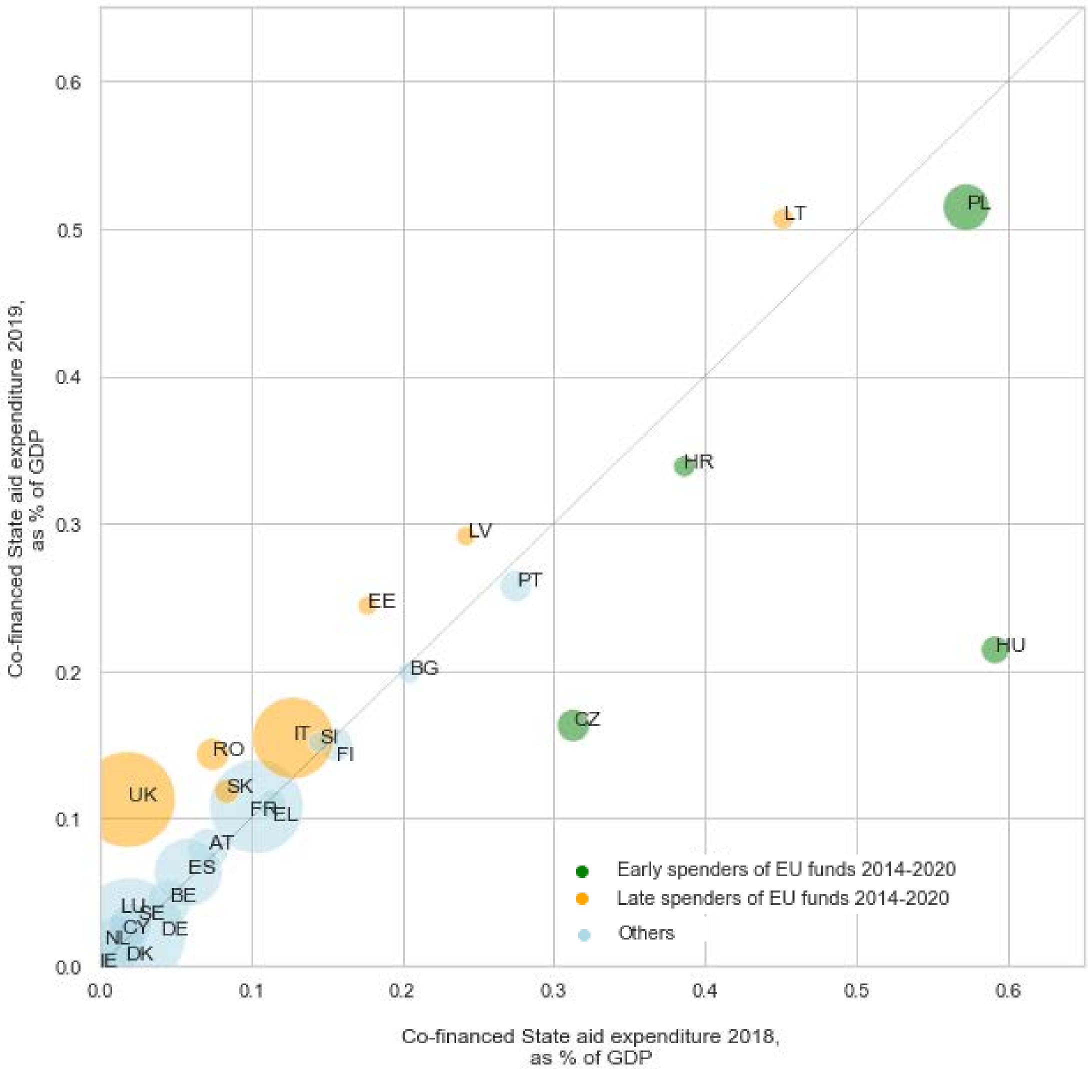


3.6. Total State aid expenditure on co-financed projects: an increase

Since 2014, Member States must report the total amount of co-financed aid, including both national and EU Structural Funds expenditure[28]. Figure 20 shows the relative increase or decrease of spending on co-financed projects per Member State from 2018 to 2019.

[28] The corresponding projects are funded under the sole responsibility of the Member States; financing granted under the Structural Funds qualifies as State aid, since EU funds are integrated in the national budget and Member States are free to select beneficiaries (Art 107 TFEU).

Figure 20: State aid expenditure on co-financed projects excluding aid to agriculture, fisheries and railways, in 2018 and 2019, in percentage of GDP



NB: the size of the dots is proportional to the 2019 GDP of the Member States.

Compared to 2018, **total spending on co-financed projects increased** from about EUR 13.7 billion to about **EUR 16.3 billion in 2019**, thus registering a **EUR 2.6 billion (+19%) increase**.

As shown in Figure 20, **the highest share of co-financed State aid expenditure as compared to GDP was recorded in 2019 in Poland (0.51%) and Lithuania (0.51%)**, well above Croatia (0.34%), Latvia (0.29%) and Portugal (0.26%).

In absolute terms, the **largest increases** were recorded in the **United Kingdom** (EUR +2.4 billion), **Italy** (EUR +500 million) and **France** (EUR +174 million); increases were also recorded in 15 other Member States (all Member States above the 45 degrees line). On the contrary, spending on co-financed projects decreased substantially in **Hungary** (EUR -491 million) and **Czechia** (EUR -294 million).

These findings reflect the State of implementation of the European Structural and Investment Funds (ESIF) 2014-2020[29]. Member States which appear below the dotted line (including Hungary and Czechia) are early spenders of cohesion funds. Having allocated most

[29] https://cohesiondata.ec.europa.eu/overview

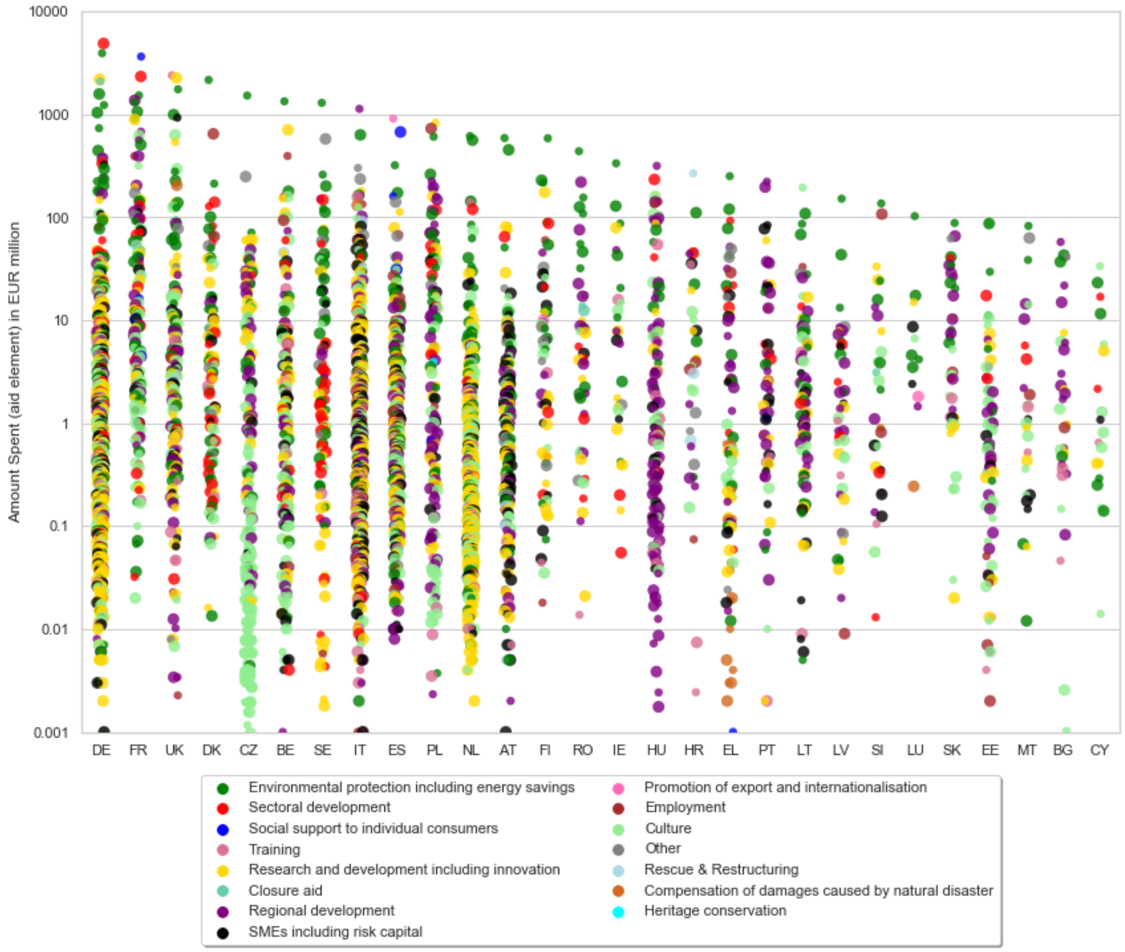
of their available funds under the 2014-2020 Multiannual Financial Framework (MFF) in early years of the MFF, these Member States are now reducing their co-financed expenditure.

3.7. State aid schemes are highly heterogeneous: focus on the largest State aid schemes in 2019 in terms of expenditure

The State aid measures currently in force are very heterogeneous in terms of expenditure size. For this reason, the 2020 Scoreboard pays particular attention to the largest State Aid schemes in terms of expenditure and displays data at the level of individual measures.

Figure 21 presents the State aid schemes in terms of spending in 2019[30], sorted by Member State and policy objective.

Figure 21: State aid schemes by Member State and policy objective, excluding aid to agriculture, fisheries and railways (in EUR million)



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 scale[31]: the upper white line represents 10 times

[30] Excluding aid to agriculture, fisheries and railways.

[31] 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.

more expenditure than the lower white line. In practice, aid measures can target several objectives, and therefore some objectives may overlap[32].

3.8. 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 794/2004[33], as amended by Commission Regulation (EU) 2015/2282[34], Regulation 1370/2007[35] of the European Parliament and of the Council and Commission Directive 2006/111/EC[36].

Figure 22: Total subsidies to the railway sector, 2009 – 2019, EUR million

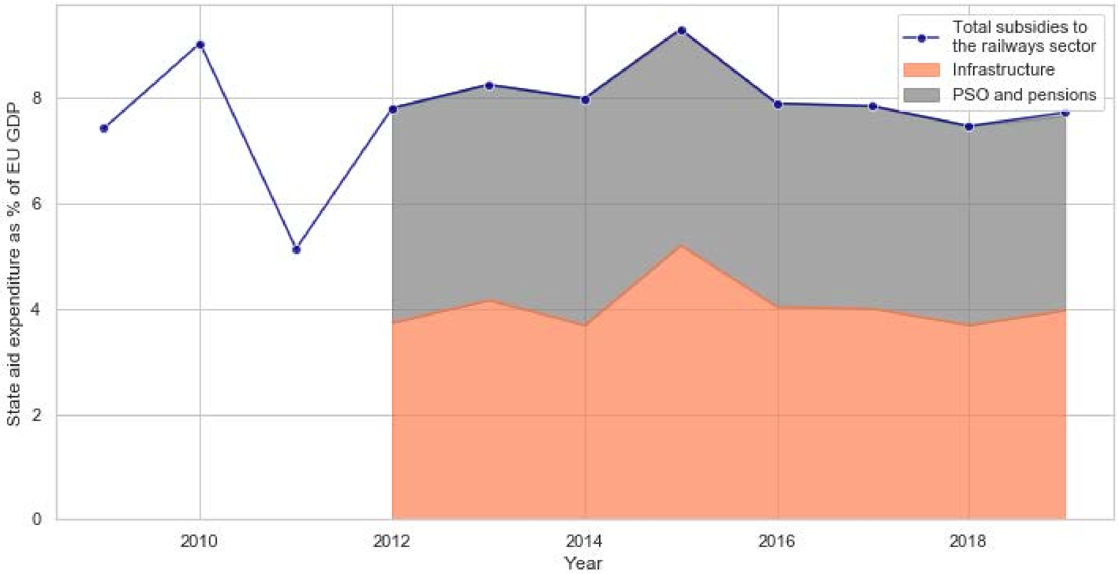


Figure 22 shows the **evolution of the overall expenditure across the EU**, from 2009 to 2019. With the exception of a decreasing trend during the financial and economic crisis (2010 - 2011) and a minor reduction in 2016, **subsidies to the rail sector** tend to be **stable** and show an **increasing trend**. For 2019 specifically, we can observe a slight increase of 1% in subsidies to the rail sector in comparison to the previous year. Nevertheless, in comparison to 2013, the relative aid granted to the railway sector as percentage spending of the European GDP has decreased by 0.003 p.p. in the last six years. The total compensation and aid granted to the **rail sector** amounts to **EUR 50.6 million in 2019**, which represent 0.83% of the total State aid expenditure in 2019 (excluding aid to the financial sector). This proportion has sharply decreased since 2013 (2.51%).

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32 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'.

33 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)

34 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)

35 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)

36 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)

Since 2012, figures are broken down into public passenger rail transport services (PSO) under Regulation 1370/2007 (green columns in Figure 23) and infrastructure and other aid (orange columns). On average, infrastructure aid represents slightly more than half (52%) of all subsidies to railways. Several Member States may not report spending on infrastructure aid considering that the measures at stake do not constituting aid in case they benefit all operators of the railways network.

Figure 23: Total subsidies to the railway sector by Member State, 2009 – 2019, as % of national GDP

Looking at the **distribution of rail sector spending as a share of GDP** (Figure 23), **Austria, Slovakia, Croatia, Hungary, Belgium, Germany, Poland, France, Luxembourg** and **Portugal** spend more than the EU 28 average (0.3% of GDP). **Austria** is the Member State spending relatively most and Finland relatively least[37].

3.9. Aid in the context of the financial and economic crisis

During the global financial and economic crisis, which started in 2008, the European Commission played a very active role in helping Member States to provide a coordinated and effective response. The State aid framework was adapted to focus on financial stability as an overarching objective, whilst ensuring that the aid and distortions of competition between

[37] Cyprus and Malta report no expenditures.

banks and across Member States were kept to the minimum and protecting taxpayers by requiring private loss sharing.

The 2020 Scoreboard presents State aid to financial institutions in the period 2008-2019, by aid instrument. The data include both the amounts of aid that the Commission authorised on the basis of notifications by Member States ("State aid approved") and the amounts of aid actually disbursed by Member States ("State aid used").

In general, the amount of approved State aid to the financial sector in form of capital or capital-like instruments has significantly decreased from the years of the financial crisis, while the level of liquidity aid approved has remained substantially on the same levels from 2018 with some schemes that provide a safety net to the sector. The amount of State aid used has progressively decreased from the years of the financial crisis (2009-2010).

Since 2017 and until the COVID-19 outbreak, the economies of all EU Member States had returned to growth and all Member States that had received EU financial assistance during the global financial and economic crisis had successfully exited their economic adjustment programmes. This economic improvement until the COVID-19 outbreak implied a decrease in the notified State aid for the financial sector and a gradual decrease in the amount of aid used by Member States, in particular for bank restructuring.

Both the State aid approved and used in the financial sector have further decreased in 2019 compared to previous years. In 2019, the amount of aid approved by the Commission for recapitalisation measures and guarantees remained stable compared to the 2018 figures. In terms of State aid used by Member States, the European banking sector did not benefit from any impaired asset measures and continued its decreasing trend of liquidity aid support. For further information on the methodology, please consult Annex II.

Table 1 : Total amounts of State aid to banks approved and used in the EU over the period 2008-2019 (in billion EUR)

Aid approved (EUR billion)												
Aid instrument	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
1. Recapitalisations	269.9	110.0	184.0	37.5	150.8	29.6	20.3	18.8	8.5	25.7	9.2	8.6
2. Impaired asset measures	4.8	338.5	78.0	6.3	157.5	14.7	3.5	1.0	0.0	0.0	3.5	0.0
Total of capital-like aid instruments (1+2)	274.7	448.5	262.0	43.8	308.3	44.3	23.9	19.8	8.5	25.7	12.7	8.6
3. Guarantees	3097.3	87.6	54.8	179.7	275.8	76.0	38.7	165.4	310.7	328.5	153.3	176.0
4. Other liquidity measures***	85.5	5.5	66.8	50.2	37.5	9.7	1.7	0.0	0.0	14.2	0.0	0.0
Total of liquidity aid instruments (3+4)	3,182.8	93.1	121.6	229.9	313.2	85.7	40.4	165.4	310.7	342.7	153.3	176.0

Aid used (EUR billion)												
Aid instrument	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
1. Recapitalisations	115.0	110.8	22.8	38.8	91.1	26.6	7.6	10.1	0.1	11.3	0.2	0.1
2. Impaired asset measures*	0.0	0.0	81.7	50.8	162.7	97.3	81.1	2.3	2.8	0.0	3.6	0.0
Total of capital-like aid instruments (1+2)	115.0	110.8	104.5	89.7	253.8	123.9	88.7	12.4	2.9	11.3	3.8	0.1
3. Guarantees**	150.7	772.2	900.7	622.3	444.3	386.6	264.0	169.3	118.4	107.4	87.5	84.2
4. Other liquidity measures***	102.9	89.3	86.2	66.7	45.2	39.2	37.5	22.1	12.4	10.9	6.8	4.5
Total of liquidity aid instruments (3+4)	253.7	861.5	987.0	689.1	489.5	425.8	301.5	191.3	130.8	118.3	94.2	88.7

** Bad banks initial assets transfers' value*
*** Annual average outstanding amount of debt issued with State guarantee*
**** Outstanding loans at end of year*

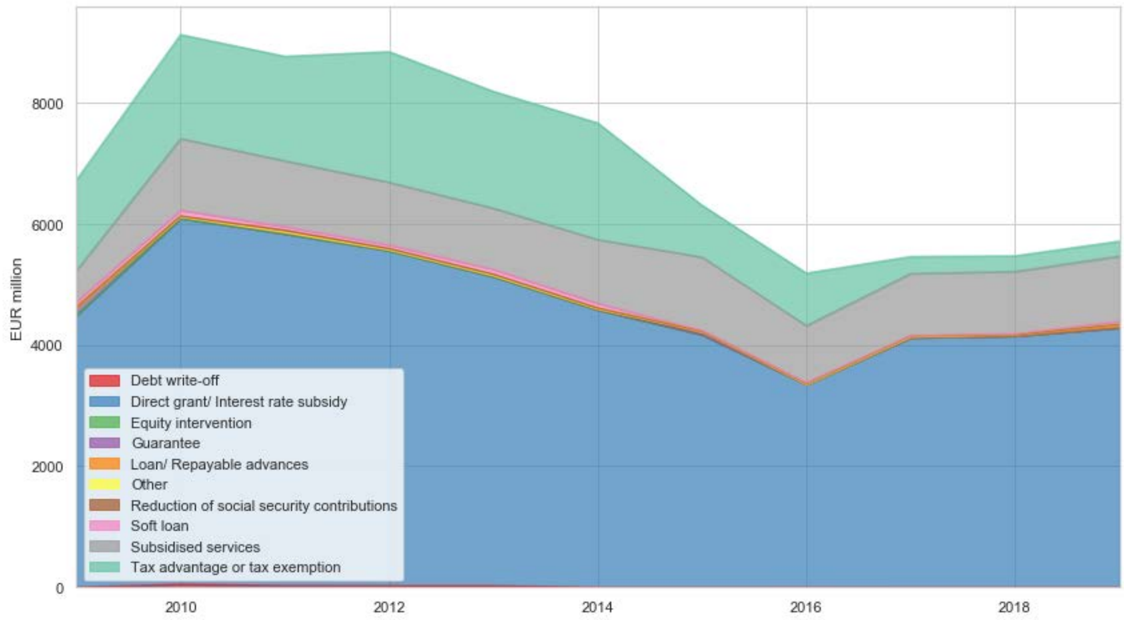
Disclaimer: The information on Aid used might be subject to future revisions depending on new information that Member States may make available. Apart from the restatement for the years 2008-2014, some figures on aid used between 2015 and 2018 have been revised based on new information provided by the Member States.

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.

3.10. State aid expenditure to agriculture, fisheries and aquaculture

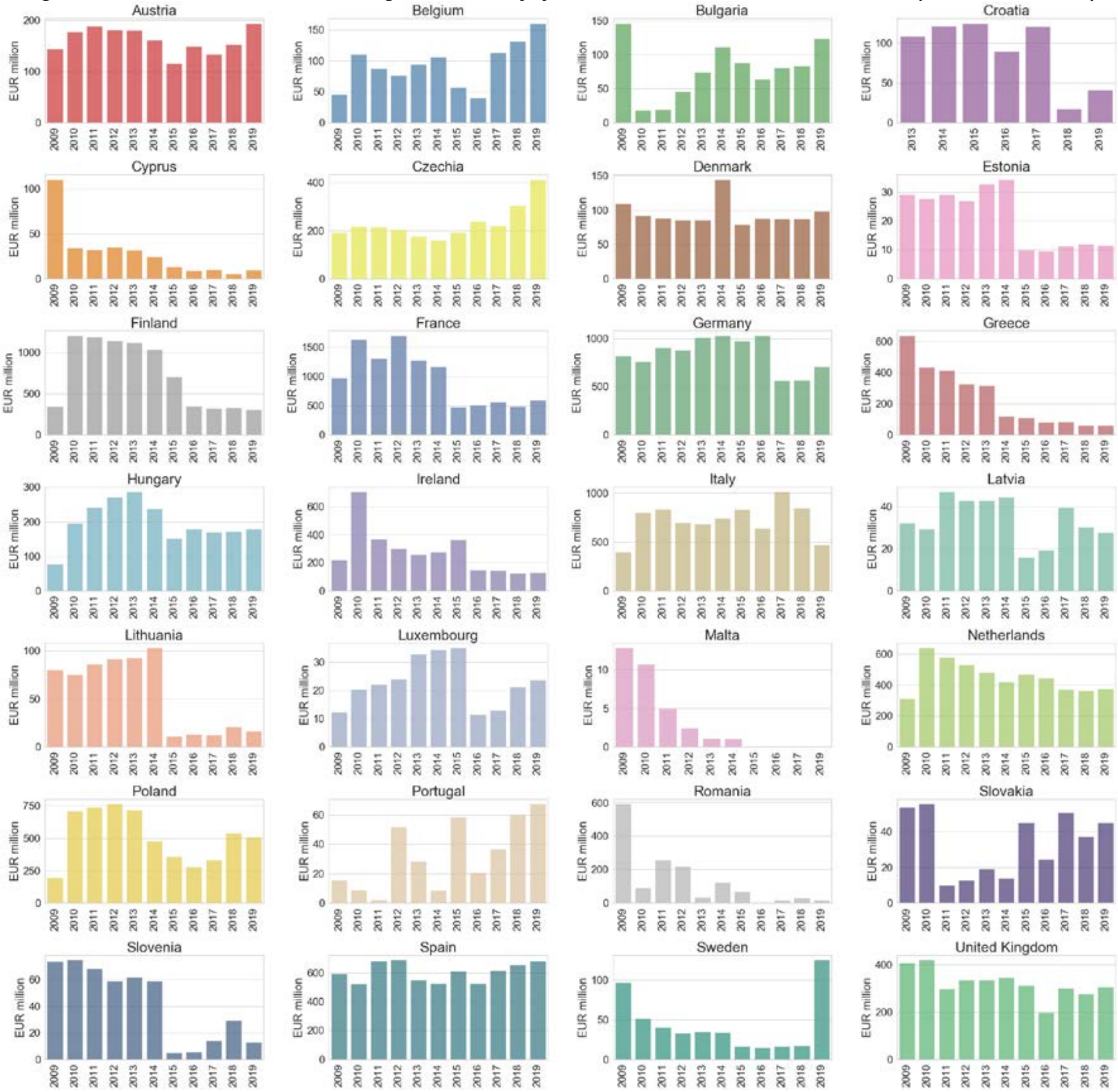
State aid expenditure to agriculture Figure 24 displays the **overall State aid expenditure to agriculture by Aid Instrument** over the period **2009-2019**. As shown in the figure, State aid to agriculture has diminished by approximately one third, from EUR 7.6 billion in 2014 to slightly less than EUR 6 billion in 2019.

Figure 24: Total subsidies to agriculture by Aid Instrument (in EUR million)



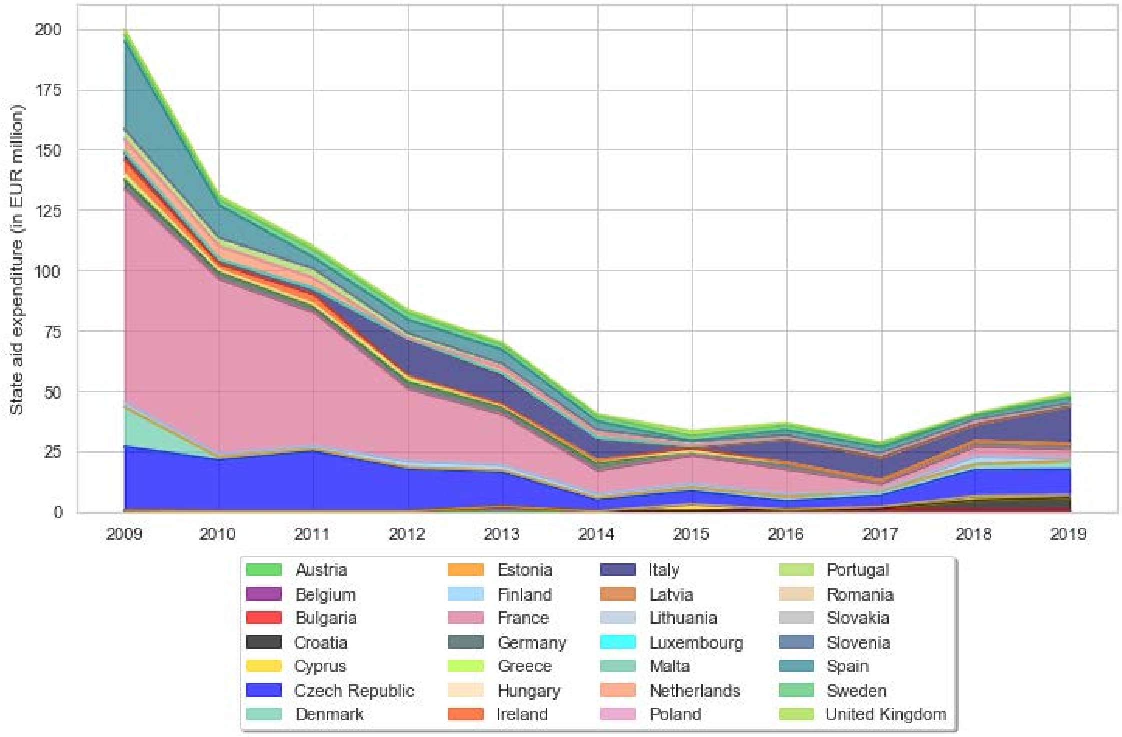
The **largest aid tool** in State aid expenditure in the agricultural sector in 2019 is **Direct grant/ Interest rate subsidy**, followed by Subsidised services, Tax advantage or tax exemption and Soft loan. The Tax advantage or tax exemption as an aid instrument in agriculture has lost its relevance over the last decade in the agricultural sector. Compared to 2011, the Tax advantage or tax exemption as Aid Instrument for State aid expenditure in the agricultural sector has decreased seven-fold.

Figure 25: Total subsidies to agriculture by year for EU-28 Member States (in EUR million)



Regarding **Member States' State Aid expenditure in the agricultural sector** (Figure 25): the **largest spender** in the agricultural sector in **2019** was **Germany** with EUR 707 million, followed by **Spain**, **France, Poland** and **Italy**. The **biggest expenditure growth** in comparison to the previous year can be observed for **Sweden**, which reports a six-fold increase in its State aid to agriculture expenditure. **Cyprus** experienced a twelve-fold State Aid expenditure reduction since 2009 and similarly, **Greece** with a ten-fold reduction. **Malta** does not report any agricultural expenditure since 2014.

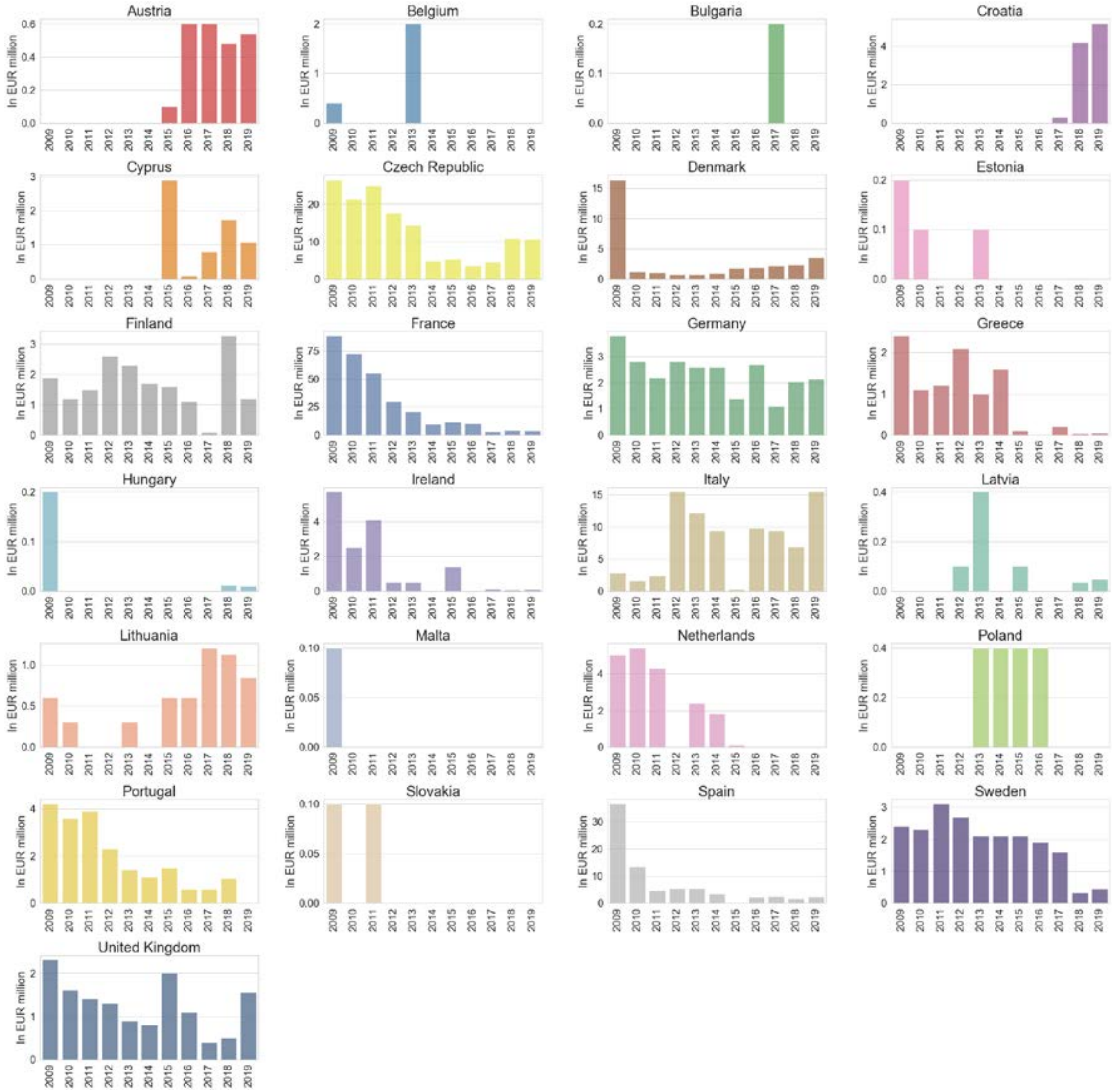
Figure 26: Total subsidies to fisheries and aquaculture by year for EU-28 Member States (in EUR million)



Member States' State Aid expenditure in the **fishery and aquaculture sector** amounted **EUR 49.15 million** in 2019 (Figure 26). This amount indicates a nominal increase of 20% compared to 2018 expenditure. The four biggest spenders, namely **Italy, Czechia** and **Croatia** made up for approximately two thirds of the total expenditure in 2019. Figure 27 breaks down the fishery and aquaculture sector spending per member state.

Belgium, Bulgaria, Estonia, Luxembourg, Malta, the Netherlands, Poland, Slovenia and **Slovakia** did not report any expenditure for 2019.

Figure 27: Total subsidies to fisheries and aquaculture by year for EU-28 Member States (in EUR million)



N.B. The Member States who did not reported any State aid expenditure to fisheries and aquaculture over the 2009-2019 period are excluded from this figure: Luxembourg, Romania, Slovenia.

4. A look at the past and an eye to the future: After 5 years of implementation, what was the impact of State aid Modernisation?

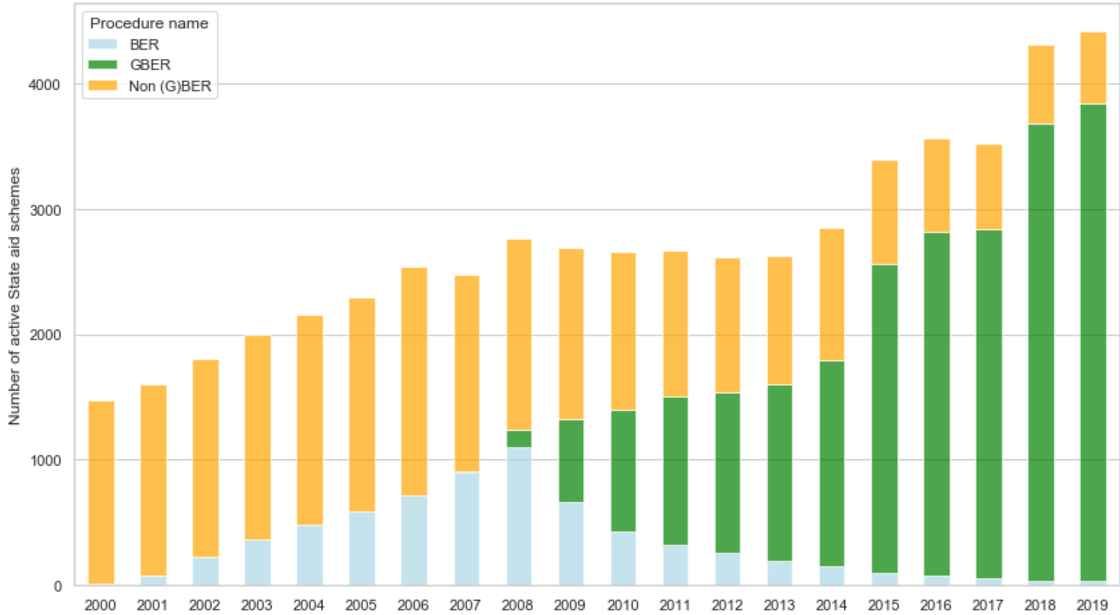
4.1. Has the State aid Modernisation reached its objectives?

4.1.1 GBER uptake is steady, but has not reached its full potential in terms of State aid expenditure

As observed in previous Scoreboards, the Member States are increasinlgy using GBER measures since the SAM. **Member States implemented 1473 new**[38] **GBER measures in 2019, now representing 95.5% of new State aid measures** (Figure 28)**.**

This upward trend gets more pronouced each year in the actual expenditure of the schemes: **among the measures active in 2019, 86.1% are GBER measures**, against 57.6% in 2014.

Figure 28: Number of cases for which expenditure has been reported by Member States, breakdown by type of procedure (excluding aid to agriculture, fisheries and railways)[39]



As observable from below Figure 29, State Aid spending under the GBER is increasing, but constantly maintaining the same proportion (of approximately 36%) for the past three years. Non (G)BER and therefore notified aid procedures prevailed in 2019 accounting for 61.5% of Member States' aid expenditure.

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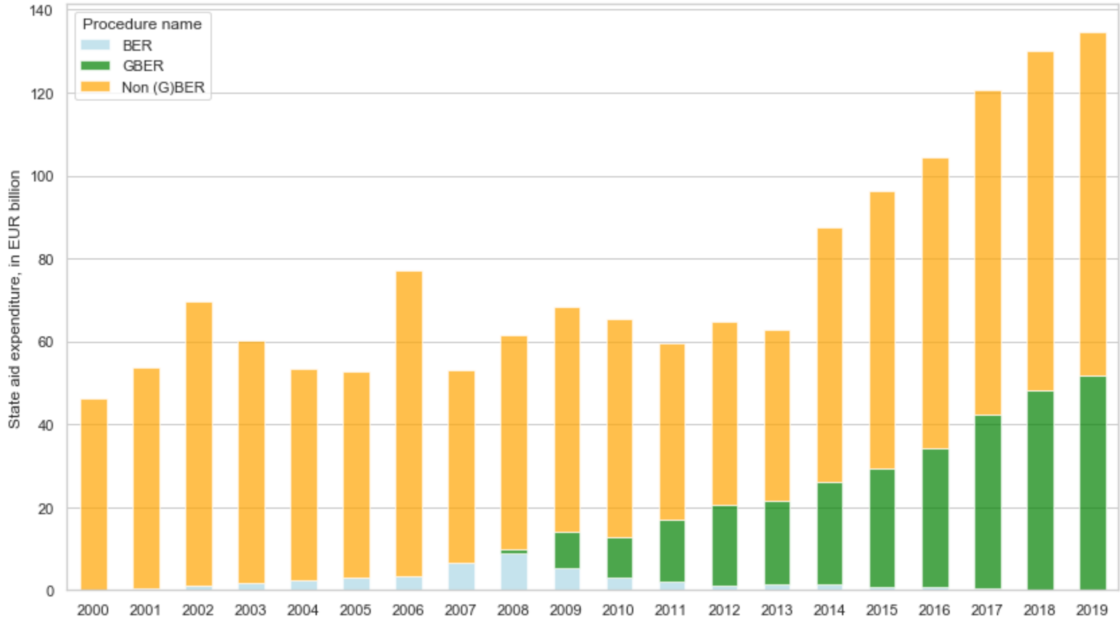
[38] "New" measures are measures for which positive expenditure was first reported in 2018.

[39] 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).

Figure 29: Breakdown of State aid spending by type of procedure



There is, however, still scope for a further increase of expenditure under the current GBER in the coming years. While the share of GBER measures in the aggregated expenditure keeps increasing, this only becomes visible once the **five largest State aid schemes** in the EU are singled out (Figure 30):

1. State aid SA.45461 (2016/N) - Germany - EEG 2017 - Reform of the Renewable Energy Law
2. State aid SA.38632 (2014/N) - Germany - EEG 2014 - Reform of the Renewable Energy law
3. State Aid C43/2006 – France - Reform of the method of financing the pensions of public-service employees working for La Poste
4. State aid C42/2007 - France - Reform of the method by which RATP (the Paris public transport operator) finances its pension scheme
5. State aid N449/2001 - Germany - Continuation of the ecological tax reform after 31.3.2002

Figure 30: Breakdown of State aid spending by type of procedure, with identification of the five largest State aid measures over the period 2000 - 2019

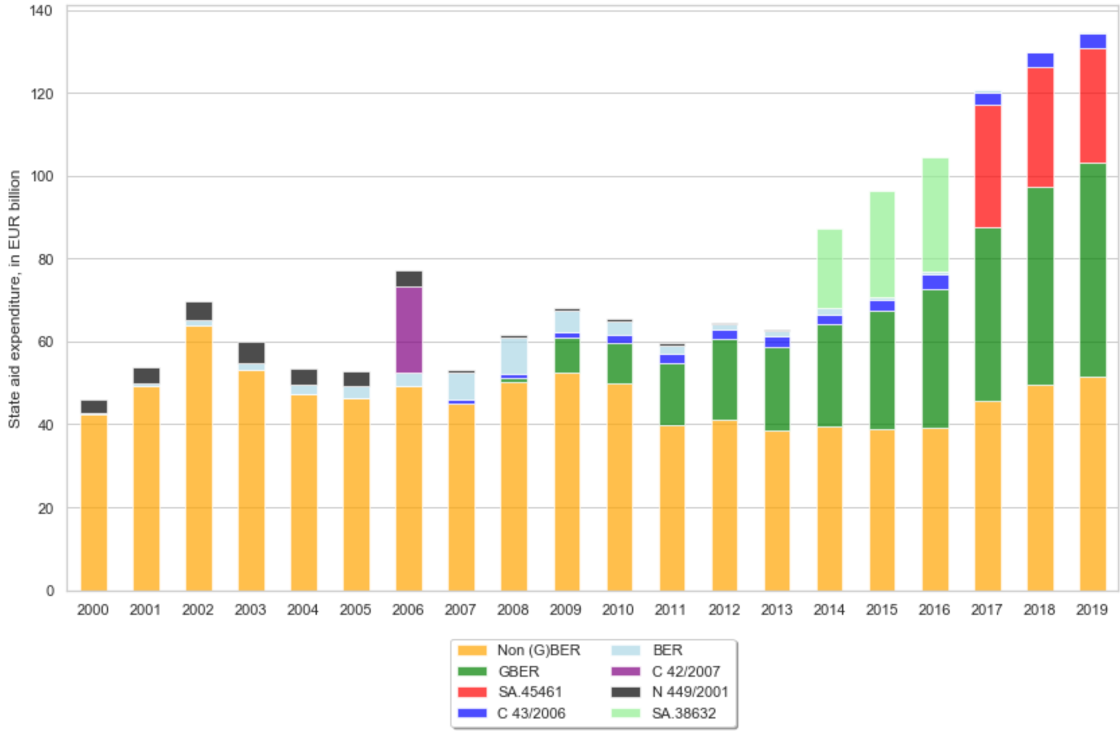


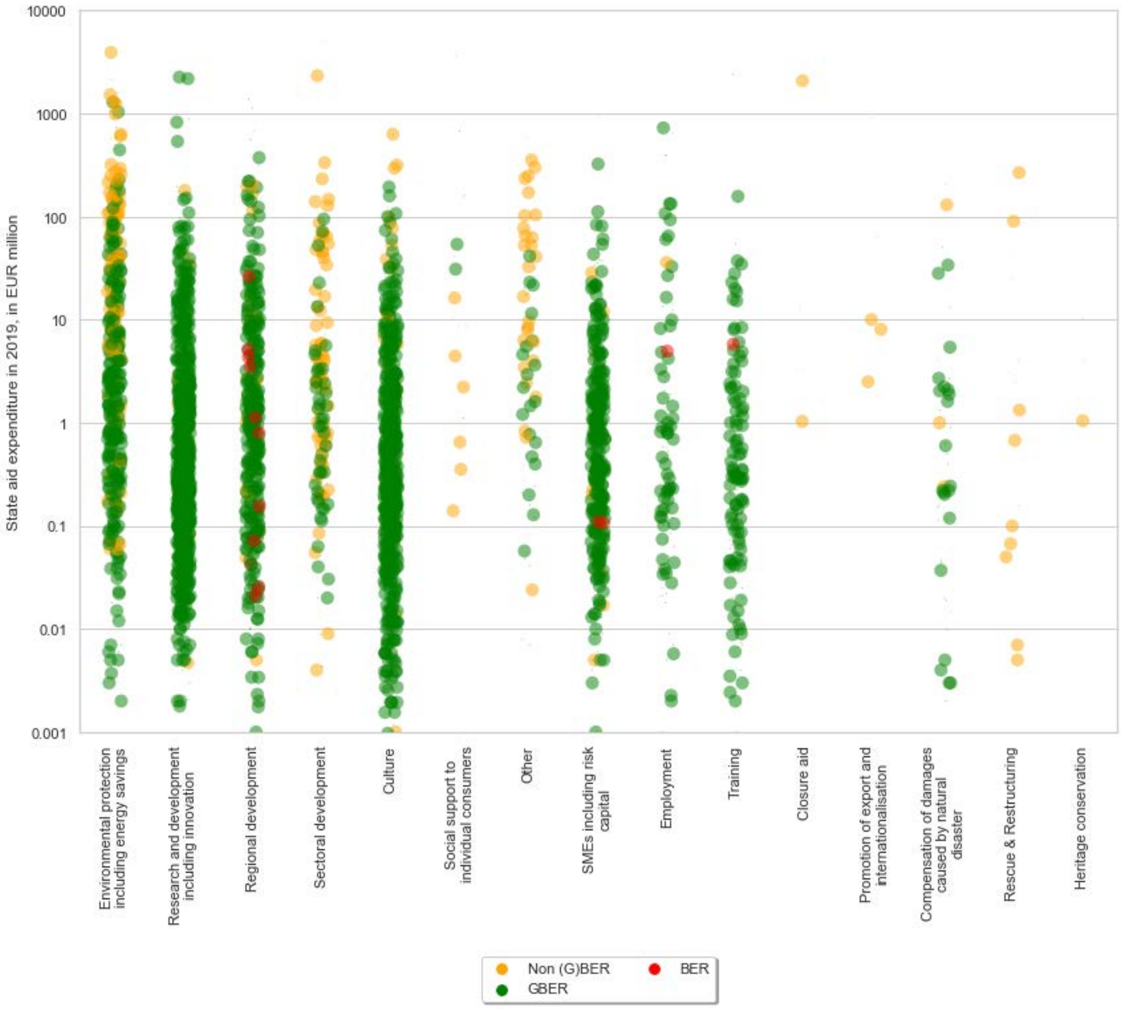
Table 2 : Breakdown of State aid spending by type of procedure, with identification of the largest five SA measures (in billion EUR)

Year	BER	GBER	Non (G)BER	Non (G)BER excluding the largest five measures	Share of all (G)BER in expenditure excluding the largest five measures	Share of notified cases in expenditure excluding the largest five measures
2009	5.4	8.6	52.5	50.7	21.6%	78.4%
2010	3.0	9.9	49.7	46.9	21.6%	78.4%
2011	1.9	15.0	39.8	36.8	31.5%	68.5%
2012	1.2	19.5	41.0	38.0	35.1%	64.9%
2013	1.4	20.1	38.5	35.6	37.6%	62.4%
2014	1.4	24.6	39.5	17.6	59.6%	40.4%
2015	0.7	28.6	38.7	10.4	73.6%	26.4%
2016	0.6	33.7	39.1	8.0	81.1%	18.9%
2017	0.4	42.0	45.6	12.9	76.6%	23.4%
2018	0.2	47.8	49.6	17.3	73.5%	26.5%
2019	0.2	51.6	51.6	20.3	71.8%	28.2%

If we exclude the largest five State aid schemes, **the share of (G)BER in State aid spending (71.8%, i.e. EUR 51.8 billion) is greater than the level of spending for notified cases (28.8% i.e. EUR 20.3 billion) in 2019**. Moreover, the share of notified measures in total expenditure (excluding the largest five State ad schemes) is on a downward trend since 2009 at least (Table 2).

Figure 31 illustrates the allocation of the largest measures by policy objective and procedure type. **Among the measures with reported expenditure above EUR 1 billion, 10 out of 23 (43.4%) are GBER measures,** which is comparable to the **43.1% proportion for measures with reported expenditure above EUR 100 million (73 GBER measures out of 169 measures)**.

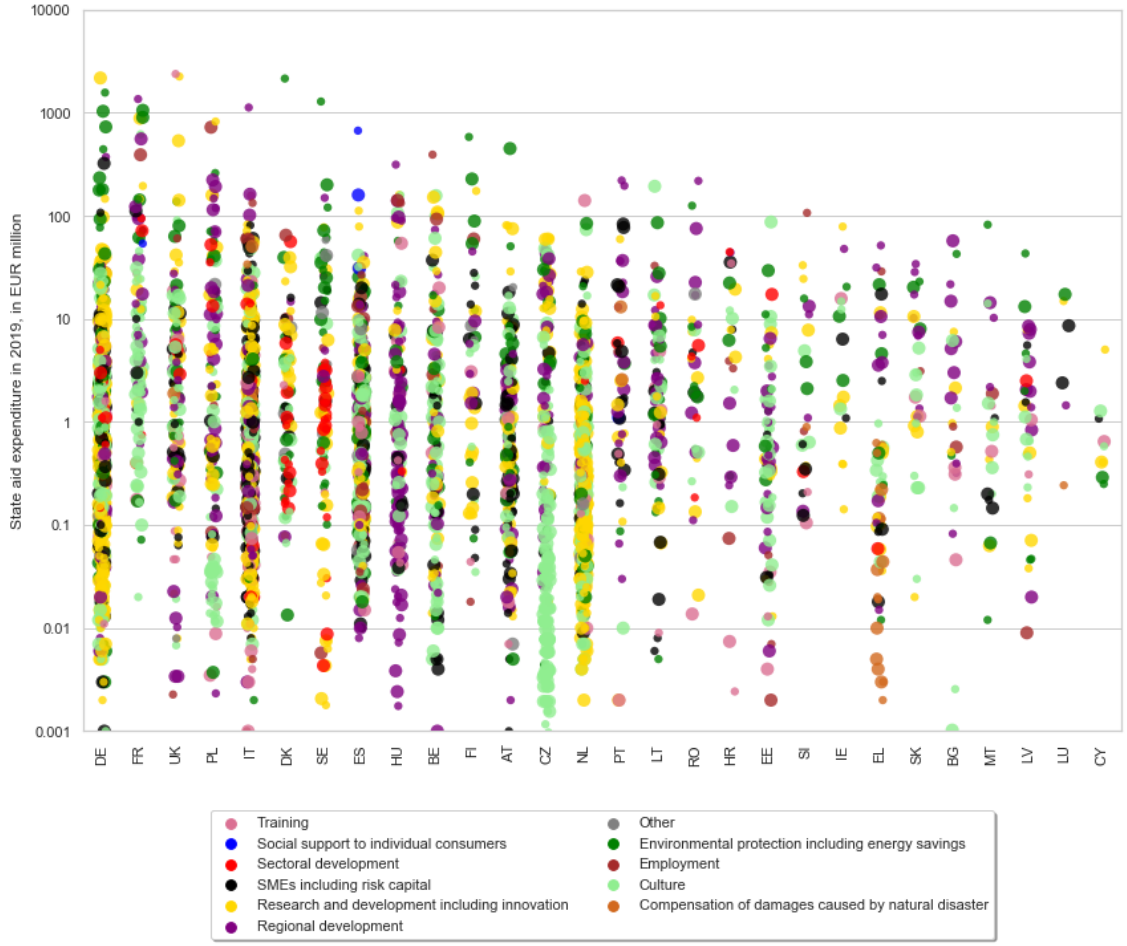
Figure 31: Largest State aid schemes in term of expenditure in 2019, breakdown by type of procedure and policy objective (in EUR million)



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 32 sheds some light on the **GBER use made by Member States.** Germany, France, the United Kingdom, Poland, Italy, Denmark, Sweden and Spain 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**: in Denmark, Malta, Sweden, Finland, Austria, Luxembourg and Latvia the largest GBER measure is an Energy tax reimbursement scheme, while in Cyprus it is a measure in Research and development including Innovation.

Figure 32: GBER schemes by expenditure in 2019, 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 differ, for layout reasons only.

As regards different policy objectives, some political priorities for GBER spending can be identified. Germany, Poland, Italy, the Netherlands and Finland mainly implement aid to Research and development including innovation through several medium-sized schemes.

R&D&I GBER schemes (in yellow in the figure) are mainly used, in terms of State aid spending, by the most advanced Member States in terms of research and innovation: Germany, the United Kingdom, France, Poland, Italy and Belgium.

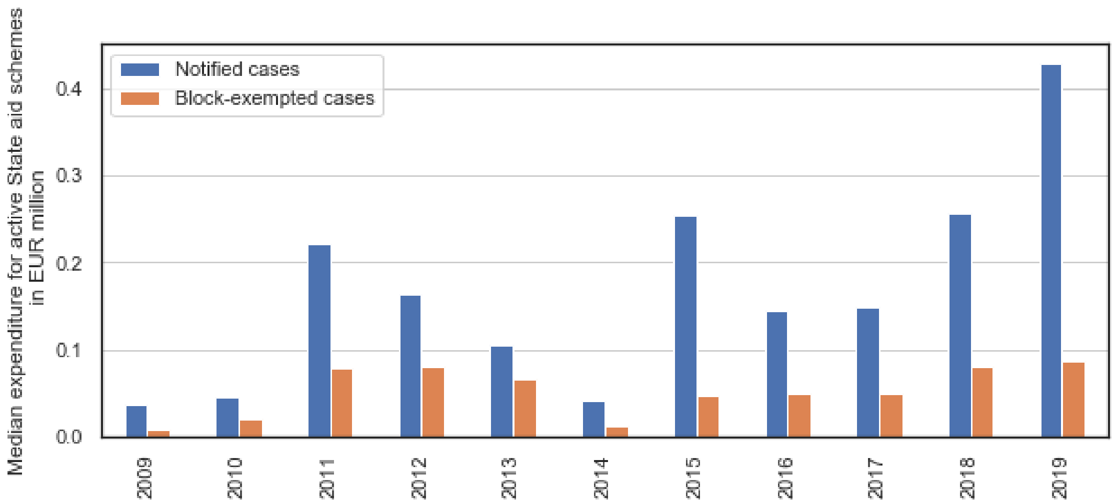
Regional development GBER measures are mainly implemented via large schemes in some of the largest Member States, in terms of both size and population: France, Italy and Poland.

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.

4.1.2 Can the Commission act "Big on big, small on small"?

Figure 33 displays the median[40] annual expenditure of notified and block-exempted measures between 2009 and 2019. Indeed, due to the presence of very large schemes in terms of expenditure, comparing the averages over time would not allow any conclusion about the impact of SAM on the size of State aid schemes.

Figure 33: Median expenditures of active State aid schemes from 2009 to 2019 in EUR million



As shown in Figure 33, the median annual expenditure for notified measures is higher than for block-exempted measures. Since 2014, the notified cases' median expenditure has increased from around EUR 0.039 million to more than **EUR 0.43 million in 2019**.

Median spending for active State Aid schemes under GBER measures has increased between 2014 and 2019 at a median annual value of **EUR 0.012 million in 2014 and EUR 0.82 million in 2019.** Therefore, Figure 33 indicates that GBER measures are progressively catching up with notified measures in terms of expenditure.

4.1.3 Has the SAM enabled faster decisions?

In line with the 'big on big and small on small' approach, the rapid proliferation of block-exempted cases in the last four years has been welcomed as an opportunity to shorten the average duration of Commission's case assessment process, to allow Member States to grant State aid more easily and to create a more agile public administration. The large GBER uptake observed implies that State aid measures could be processed more rapidly than before the SAM, since the increasing share of GBER measures does not require any decisions from the Commission before being implemented.

[40] Using the medians removes the impact of particularly large measures that artificially inflate the averages and thereby distort the overall picture.

Figure 34: Median duration of procedures for non-block exempted measures Pre and post-SAM, in calendar days

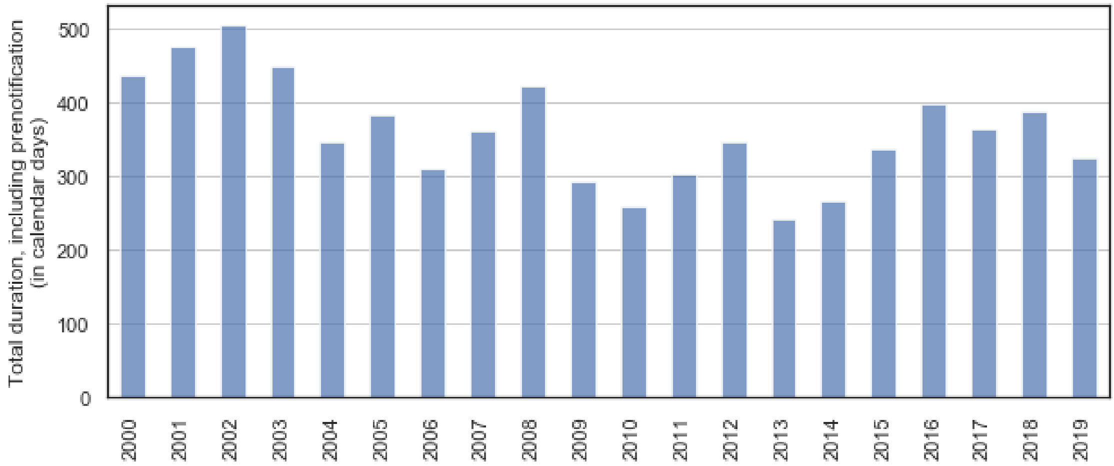


Figure 35: Number of GBER measures registered by year

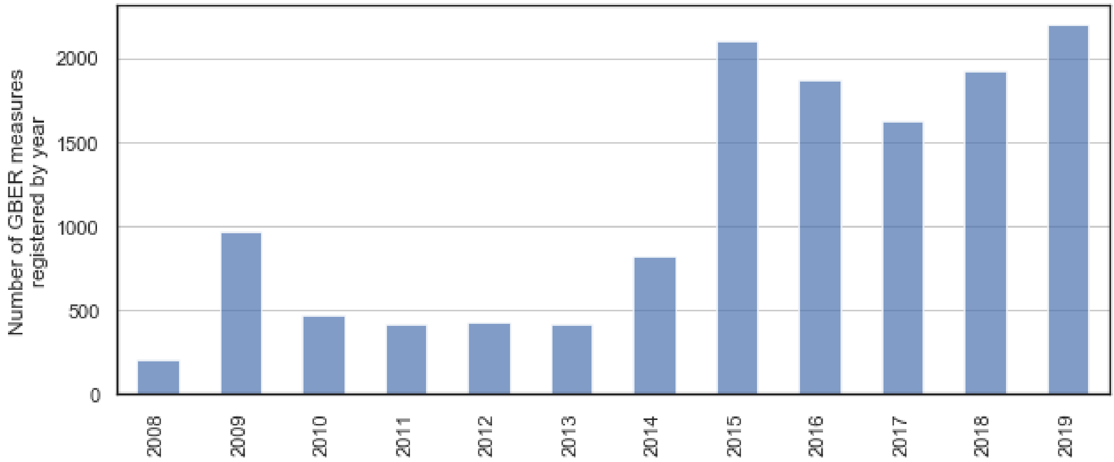


Figure 34 plots the average duration of notification and pre-notification procedures before and after the State Aid Modernisation and compares this with the number of GBER measures registered by year.

The impact of the GBER uptake can be seen in the slight increase of the median duration of notified procedures (Figure 35), which corresponds to an increase in the complexity of the State Aid cases after the block-exemption of the least problematic cases. The number of GBER measures registered by year, also has increased significantly (almost tripled) to **2201 GBER measures in 2019** since the State Aid Modernisation in 2014.

4.2. How has State aid spending capacity evolved in the EU?

If wealthier Member States were allowed to support their domestic industries in an unrestrained manner, this would increase disparities and hinder the integration of the Single Market. This section looks at how State aid spending has evolved across the different Member States from 2013 (the year before the introduction of the SAM) until 2019.

Figure 36 shows the relation between State aid spending per capita, including co-financed aid, in 2013[41] (on the x-axis) and the change in State aid spending per capita[42] registered in the period 2013-2019 (on the y-axis)[43]. Each bubble in the chart corresponds to a different

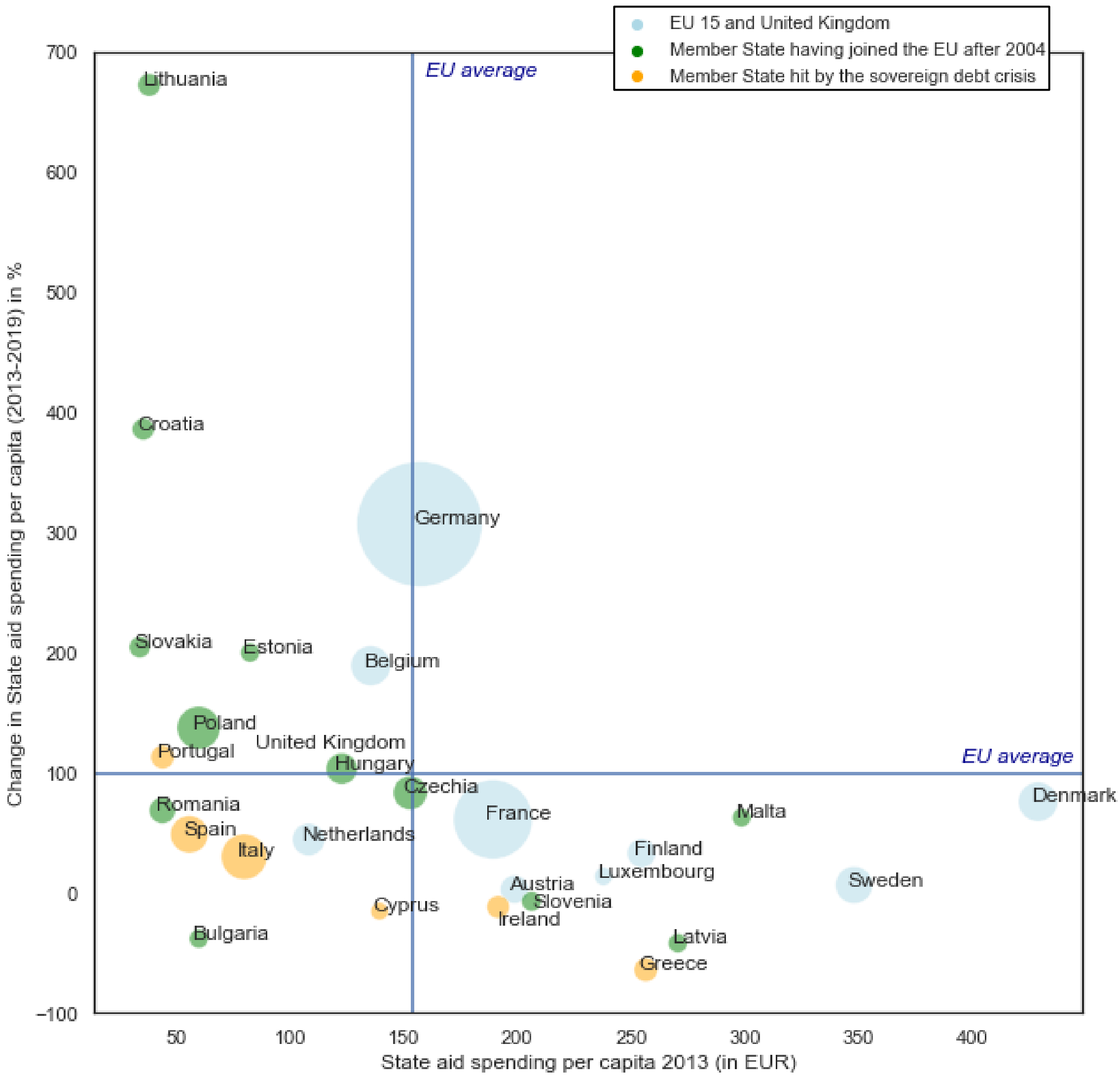
[41] EU28 average spending in 2013 set at 100.

[42] Including co-financed aid

[43] In percentage points

Member State. The size of the bubbles corresponds to the nominal amount of spending in 2019.

Figure 36: Change in State aid spending per capita (2013-2019) versus State aid spending per capita in 2013



N.B. The size of the dots is proportionnal to the 2019 GDP of the Member States.

The chart is divided into four quadrants:

- On the upper right-hand side, there are **Member States who were spending already more than the EU average in 2013 and have kept increasing their expenditure in per capita terms**: Looking at the total spending in 2019 (represented by the size of the bubbles), Germany (+306 p.p.) is the Member State spending the most in absolute terms, with a remarkable increase in the last six years (from EUR 156 aid per person in 2013 to EUR 638 per person in 2019). Germany is the only wealthy Member State that is further increasing its spending capacity, which in turn increases the gap with the other Member States.

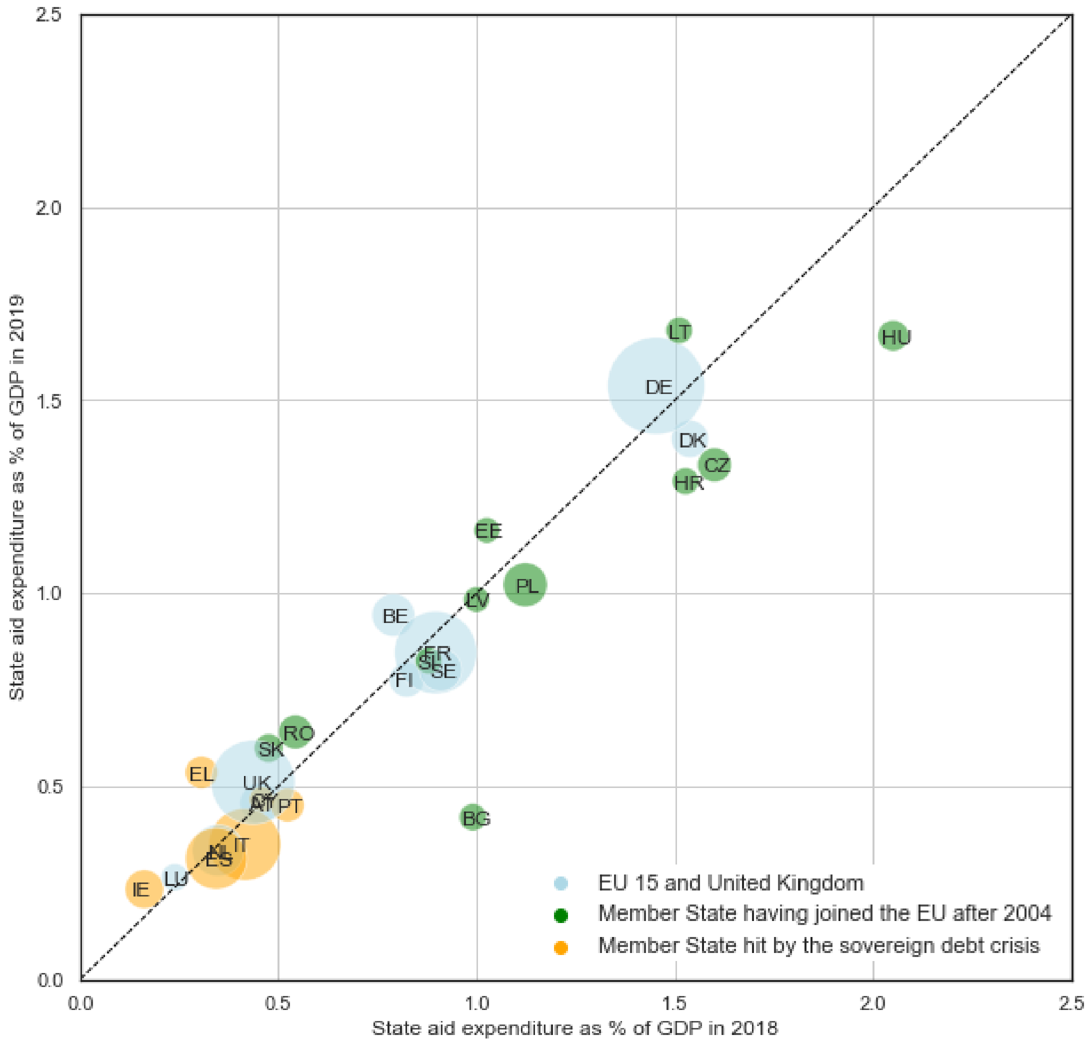
- On the upper left-hand side are **Member States who were spending less than the EU average in 2013, but have increased since then**: Lithuania (+672 p.p.), Croatia (+386 p.p.), Slovakia (+204 p.p.), Estonia (+200 p.p.), Belgium (+189 p.p.), Poland (+137 p.p.), United Kingdom (+120 p.p.) and Portugal (+113 p.p.). In real terms, Hungary (+103 p.p.) also belongs to this cluster. Most of these catching-up Member States have joined the EU after 2004. Three exceptions are seen for Belgium, the United Kingdom and Portugal who have nevertheless moderately increased their State aid expenditure per capita after SAM.

- The lower left-hand side of the chart represents **Member States that were spending less than the EU average in 2013 and have decreased spending since then or increased spending but by less than EU average**: Czechia (+83 p.p.), Romania (+68 p.p.), Spain (+48 p.p.), the Netherlands (+44 p.p.), Italy (+30 p.p.), Cyprus (-16 p.p.) and Bulgaria (-38 p.p.). These Member States, with the exception of the Netherlands are either EU13 or Member States seriously affected by the European sovereign debt crisis.

- Member States reported in the lower right-hand side of the chart are **Member States which were above the EU average in 2013, but have decreased their spending per capita in the period 2013-2018:** Greece (-64 p.p.), Latvia (-42 p.p.), Ireland (-12 p.p.), Slovenia (-40 p.p.), Cyprus (-20 p.p.), Slovenia (-7 p.p.), Austria (+3 p.p.), Sweden (+6 p.p.), Luxembourg (+14 p.p.), Finland (+33 p.p.), France (+61 p.p.), Malta (+62 p.p.) and Denmark (+76 p.p.). The largest decrease over the period 2013-2019 has been therefore observed in Greece, which is the Member State most severely affected by the European sovereign debt crisis.

It results from the above that overall, **Member States' State aid spending capacity has increased in the last six years.** On average, the EU28 State aid spending per capita has doubled since 2013 (+99 p.p.). Nevertheless, among Member States that were spending below EU average six years ago, Member States seriously affected by the European sovereign debt crisis, were still spending below EU average in 2019.

Figure 37: Change in State aid expenditure between 2018 and 2019, in % of GDP, with a typology of Member State aid expenditure profiles.



N.B. The size of the dots is proportional to the 2019 GDP of the Member States. Malta is an outlier and therefore not displayed on this figure for layout reasons. Malta's State aid expenditure as percentage of GDP was 3.34% in 2018 and 1.82% in 2019.

This figure is identical to Figure 5, with the identification of three groups of Member States:

- **A first group** (in yellow) consists of Member States severely hit by the European sovereign debt crisis, a debt crisis that has been taking place in the European Union since the end of 2009. This group comprises Cyprus, Greece, Italy, Ireland, Spain and Portugal. These Member States still had a relatively limited State aid expenditure in 2018 and 2019 (less than 0.6% of their respective GDPs).

- **A second group** (in green) comprises the Member States having joined the European Union after 2004. A significant heterogeneity can be observed in their State aid expenditure profiles. In particular, the State aid expendiure is lower in Slovakia, Romania and Bulgaria, while Hungary, Latvia, Czechia and Hungary make four of the six Member States which disburse the most as compare to their GDPs. The significant decrease in expenditure in 2019 as compare to 2018 in Hungary, Czechia, Poland and Bulgaria reflect the State of implementation of the European Structural and Investment Funds (ESIF) 2014-2020. Having allocated most of their available funds under the 2014-2020 Multiannual Financial Framework (MFF) in early years of that period, these Member States are now reducing their co-financed expenditure.

- **The third group** (in light blue) consist of the 15 Member States of the European Union as of 31 December 2003, before the new Member States joined the EU. In this group, Germany and Denmark can be singled-out as they disbursed significantly more State aid than the others (around 1.5% of their GDP). On the contrary, the United Kindgom, Austria and Luxembourg have less recourse to State aid expenditure (less than 0.5% of their GDP).

Annex I. Methodological remarks

Scope – The State Aid Scoreboard comprises aid expenditure made by Member States before 31.12.2019 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 (from 2014 also on Renewable Energy Schemes), 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.

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 2020 cover aid granted by Member States between 1 January 2019 and 31 December 2019 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. Historical State aid expenditures are expressed in current 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: 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.

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 subdivided depending on whether the aid was granted through the budget or through the tax or social security system. Below is a list of aid instruments where the aid element is equal to the capital value of aid:

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. 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 II. Aid in the context of the financial and economic crisis: methodological remarks

In recent years, the services of DG Competition have worked together with Member States to review data on State aid used by Member States for the years 2008-2014. The methodology of the collection of data on aid used has been progressively improved and refined, with the aim to harmonize the treatment of similar measures and to ensure a consistent reporting among Member States. Thanks to this unified methodology for the entire period 2008-2019, the services of DG Competition were able to compile data for aid used by Member States, which are consistent, comparable and verified by the relevant Member States. The Commission is therefore able to restate the data for 2008-2014 in the 2020 Scoreboard.

Until 2015, the Member States reported the data on aid used on a yearly basis and in an aggregated manner. As the reporting year 2015, the Commission decided to improve the reporting on aid used. In particular, it was decided to increase the granularity of the reported data (ideally at decision/beneficiary level), to classify the aid used more precisely by State aid instrument, and to add data on aid recovered and other ancillary characteristics of the measures. To this end, the Commission developed a template and reporting guidelines to achieve a unified reporting methodology. The Commission asked Member States to report the data on aid used on the basis of that methodology, going forward on a yearly basis as well as for the past period 2008-2014.

The analysis of the figures collected over the years 2008-2014 under the unified methodology showed several inconsistencies with the aggregated data initially reported to the Commission. These inconsistencies resulted mainly from the more granular nature of the data collected under the unified methodology. The Commission and the Member States have therefore worked together to address the discrepancies between the aggregate data initially collected and the re-collected data under the unified methodology and to agree on a common interpretation of the reporting guidelines. This data verification process allowed the Commission to gather all comments and questions from the Member States and to provide a consistent interpretation of the reporting guidelines to all concerned Member States. The re-stated data for the years 2008-2014 and the data collected since 2015 are thus consistent across Member States and classified in a coherent manner. At the end of the restatement process, all the data reported have been agreed with the respective Member State, clarifying all the interpretations and with the Commission ensuring the consistency of the data across the EU countries.

In concrete terms, the verification process has identified several reasons for the differences between the initially reported data and the re-stated data:

a) **Differences in calculation methods for guarantees (nominal amounts vs. gross-grant equivalent, outstanding amount vs. point-in-time).** For measures of liquidity aid, the aid amount is not equal to the nominal amount of the measure. In some cases, Member states have reported the aid amounts (i.e. gross-grant equivalents) rather than nominal amounts. Furthermore, all the liquidity measures have to be reported as outstanding stock (instead of aid used at one point in time), and a methodology was defined to calculate the outstanding stock among the possibility to report a year end or an average and defining the data on which the average is calculated;

b) **Additional data had become available in subsequent years.** For some long-running measures, Member States may collect additional and more precise data that only become available through their internal procedures with a significant delay;

c) **Aid may not have been correctly categorised at the outset. Complex** support measures sometimes do not fall clearly in only one of the categories of State aid instruments. For example, a measure may provide for both a liquidity relief and capital support to allow for the sale of impaired assets. These cases have been discussed with the relevant Member State in order to assign the correct amount of aid to each aid instrument;

d) **Reporting of no aid measures.** Member States have sometimes reported amounts related to measures where the Commission had concluded that these were on market terms;

e) **Aid may not have been attributed to the correct year at the outset.** The use of the date of the decision vs. the date at which the aid has been granted has led to the reporting of aid in the wrong year;

Clerical mistakes and duplication of data. The review also helped to identify instances of clerical mistakes and duplicated data.

The figures reported in the 2020 Scoreboard have a more consistent classification of aid according to which aid instrument was used and allow for a robust comparison throughout the years and across Member States. The restated figures provide a solid basis for trend analyses of the State aid used by Member States in the period 2008-2019.

Annex III. Largest State aid Schemes by policy objectives

Closure aid

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Germany	N 708/2007	Coal mine closure plan 2008-2018	2 073.8
Romania	SA.49558	Amendment of aid measures for mine closure in Romania	13.7
Romania	SA.42800	Prolongation of aid for exceptional costs for mine closure in Romania	12.4
Slovenia	N 175/2010	Postponement of the closure of mine Trbovlje Hrastnik Ltd	3.1
Slovakia	SA.49270	Aid to cover exceptional costs of mining unit Cigel of Hornonitrianske Bane Prievidza, a. s. in Slovakia	1.0

Compensation of damages caused by natural disaster

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
United Kingdom	SA.42596	Amendment to the Government Support to the Flood Reinsurance Scheme	204.1
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	130.1
Italy	SA.55057	Procedure operative 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.	50.5
Italy	SA.52730	Aiuti destinati a ovviare ai danni arrecati dal sisma in centro Italia del 2016	33.9
Germany	SA.41661	Wiederaufbauhilfe Hochwasser 2013	28.1
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	13.1

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Germany	SA.54160	Hilfsmaßnahmen für die Hochwasserkatastrophe im Mai/Juni 2016 - Programm zur Wiederherstellung der Infrastruktur in den Gemeinden des Landkreises Rottal-Inn (PWI 2016)	5.4
Germany	SA.36801	Hochwasserhilfe 2013 Sachsen	4.0
Italy	SA.48508	Detassazione di contributi, indennizzi e risarcimenti	2.7
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	2.7
Portugal	SA.48943	Restoration of the business activity affected by the fires that began on June 17, 2017, affecting the municipalities of Castanheira de Pera, Figueiró dos Vinhos, Góis, Pampilhosa da Serra, Pedrógão Grande, Penela and Sertã in the Central Region.	2.6
Italy	SA.50899	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 del	2.2
Italy	SA.55682	EMERGENZA VAIA DIMARO	2.1
Sweden	SA.53614	Stöd till åtgärder efter skogsbränder i Dalarnas-, Gävleborgs- och Jämtlands län	2.0
Italy	SA.54161	Contributi e indennizzi previsti dagli articoli 72 e 74 della l.p. n. 9 del 2011, a favore dei soggetti privati danneggiati dal nubifragio che ha colpito i comuni di Moena e Soraga, in val di Fassa, il 3 luglio 2018.	2.0
United Kingdom	SA.49876	Cumbria Business Flood Recovery Scheme	1.9
Italy	SA.54223	Emergenza maltempo 27-30 ottobre 2018: contributi e indennizzi a favore dei soggetti privati danneggiati, ai sensi degli articoli 72 e 74 della legge provinciale n. 9 del 2011	1.6
Spain	SA.49734	ECON - Ayudas destinadas a establecimientos comerciales, mercantiles e industriales afectados por los incendios de octubre de 2017 en el ámbito de la competencia de la Consellería de Economía, Empleo e Industria	1.3
Italy	SA.35083	Reduced taxes/contributions linked to 2009 earthquake in Abruzzo	1.0
Slovenia	SA.52827	Odprava posledic škod po naravnih nesrečah v gospodarstvu	0.9
Greece	SA.54013	Αποζημίωση για πυρκαγιές 23-24 Ιουλίου 2018 στους Δήμους Μαραθώνα και Ραφήνας-Πικερμίου της Περιφέρειας Αττικής	0.6

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Greece	SA.51209	Αποζημίωση για πλημμύρες 6-7 Σεπτεμβρίου 2016 στην Περιφερειακή Ενότητα Μεσσηνίας της Περιφέρειας Πελοποννήσου	0.6
Austria	SA.46141	Richtlinie für die Abwicklung des Entschädigungsverfahrens nach Katastrophenschäden im Vermögen natürlicher und juristischer Personen mit Ausnahme der Gebietskörperschaften im Bundesland Steiermark - Katastrophenfonds-Richtlinie Steiermark	0.5
Greece	SA.52308	Αποζημίωση για πλημμύρες από Ιούλιο 2014 έως Φεβρουάριο 2015 στην Περιφερειακή Ενότητα Έβρου	0.5
France	SA.40424	Régime exempté d''aides destinées à remédier aux dommages causés par certaines calamités naturelles	0.4

Culture

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
United Kingdom	SA.41396	Film tax relief modification	629.1
France	SA.42681	Régime cadre exempté de notification relatif aux aides en faveur de la culture et de la conservation du patrimoine	619.0
France	SA.43130	Crédit d'impôt cinéma et audiovisuel et Crédit d'impôt pour les oeuvres cinématographiques et audiovisuelles étrangères – modifications et prolongation	316.0
United Kingdom	SA.48771	High-End Television Tax Relief - prolongation	294.7
Lithuania	SA.44185	Pagalba kultūros sektoriui	193.6
Hungary	SA.51001	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	158.7
Belgium	SA.39169	Decreet houdende de ondersteuning van de professionele Kunsten	157.3
France	SA.48907	Aides financières automatiques à la production et à la préparation des œuvres audiovisuelles - documentaire de création et fiction (FR)	154.2
United Kingdom	SA.48362	Video games tax relief - Prolongation	124.7

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Italy	SA.49294	Tax incentives for the production of cinematographic works (IT) - modifications	124.0
Germany	SA.50829	Modification of the Geman Film Fund (DFFF)	107.9
Hungary	SA.50407	a Modern Városok Program megvalósításáról szóló 250/2016. (VIII. 24.) Korm. rendelet	107.0
Hungary	SA.50768	Further Amendment of the Hungarian Film Support Scheme	105.3
Belgium	SA.40452	Decreet betreffende het onroerend erfgoed van 12 juli 2013	100.1
Belgium	SA.38370	Modifications du "tax shelter" pour soutenir des oeuvres audiovisuelles	97.2
Italy	SA.49296	Tax incentives for the production of audiovisual works (IT) - modifications	97.0
United Kingdom	SA.39513	Theatre Tax Relief	90.7
Estonia	SA.46893	Kultuuri edendamise ja kultuuripärandi säilitamise abikava	87.2
France	SA.52059	Aides financières automatiques à la production et à la préparation des oeuvres cinématographiques de longue durée	77.5
Netherlands	SA.54682	NL_BZK_CSDO Exploitatiesteun Wildlands Adventure Zoo Emmen 2019	73.5
Belgium	SA.49251	Decreet van 7 juli 2017 houdende de subsidiëring en erkenning van het sociaal-cultureel volwassenenwerk.	60.6
France	SA.47892	Crédit d'impôt en faveur de la création de jeux vidéo	53.0
Czechia	SA.47435	Poskytování filmových pobídek	48.3
Italy	SA.50782	Tax credit produttori esecutivi di opere audiovisive culturali non aventi la nazionalità italiana	48.0
France	SA.51944	Prolongation of support to live performances – France	47.0

Employment

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Poland	SA.40525	Dofinansowanie do wynagrodzenia pracowników niepełnosprawnych	724.1
Denmark	SA.35545	Flexi-job scheme, including new compensation to companies; Social measures in the employment sector	643.7

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Belgium	SA.53082	Maatwerk voor collectieve inschakeling	392.5
France	SA.40208	Régime exempté d''aides en faveur de l''emploi des travailleurs défavorisés et des travailleurs handicapés	391.4
Hungary	SA.51001	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	141.5
Italy	SA.51309	Incentivo Occupazione Mezzogiorno	133.2
Hungary	SA.54571	A megváltozott munkaképességű munkavállalók foglalkoztatásához nyújtható költségvetési támogatások - költségvetés emelése	132.9
Slovenia	SA.43396	Pomoč delodajalcem zaradi zaposlenih invalidov	107.0
Belgium	SA.53048	Professionele integratie van personen met een handicap - VOP (loonsubsidies)	93.0
Denmark	X 98/2010	Ansættelse med løntilskud (bemærk, at denne indberetning også omfatter støtteordning NN33/2004 samtidig med N172/2003) - TO BE DEFINED	64.9
United Kingdom	SA.43103	European Structural & Investment Funds 2014-2020 INCLUSIVE GROWTH	60.4
Italy	SA.45174	Incentivi alle assunzioni	60.0
Finland	SA.40791	Palkkatukiohjelma	59.7
Italy	SA.51372	Incentivo occupazione NEET	59.3
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)).	36.0
Lithuania	SA.44066	Parama socialinėms įmonėms	32.8
Greece	SA.45141	Πρόγραμμα επιχορήγησης επιχειρήσεων για την απασχόλησης 15.000 ατόμων που βρίσκονται σε ιδιαίτερα μειονεκτική θέση, ηλικίας άνω των 50 ετών	28.9
Spain	SA.53370	ASOC - Subvenciones públicas destinadas al fomento del empleo para personas con diversidad funcional o discapacidad en Centros Especiales de Empleo y enclaves laborales	26.8
Spain	SA.54447	ASOC - Integración laboral de personas con discapacidad en centros especiales de empleo, mediante ayudas a los costes salariales	16.5
Spain	SA.51930	ASOC - Subvenciones a la inserción laboral de personas con discapacidad (modificación SA.43427).	14.4
Spain	SA.55886	ASOC - Integración laboral de personas con discapacidad en Centros Especiales de Empleo de Aragón (modificación SA.45149)	13.3

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Belgium	SA.48579	Subvention aux entreprises d''insertion	12.4
Spain	SA.51710	ASOC-Subvenciones destinadas a las unidades de apoyo a la actividad profesional de las personas con discapacidad de especial dificultad contratadas en centros especiales de empleo	10.1
Denmark	SA.36932	Ansættelse med løntilskud	9.9
Spain	SA.45943	ASOC - Fomento del empleo para personas con discapacidad en Centros Especiales de Empleo y enclaves laborales	8.7

Environmental protection including energy savings

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Germany	SA.45461	EEG 2017 - Reform of the Renewable Energy Law	27 606.7
Germany	SA.46526	Reduced surcharge for self-generation under EEG 2017	3 905.9
Denmark	SA.42897	The Danish Electricity Tax Reimbursement Scheme	2 149.6
United Kingdom	SA.33210	Feed In Tariffs to support the generation of renewable electricity from low carbon sources	1 743.1
Germany	SA.39500	Entlastung von der Stromsteuer für bestimmte energieintensive Unternehmen des produzierenden Gewerbes gemäß § 10 Stromsteuergesetz (Spitzenausgleich)	1 570.0
France	SA.43468	Taux réduits de taxe intérieure sur la consommation finale d'électricité (TICFE)	1 523.0
Czechia	SA.40171	2006 RES support scheme	1 515.1
Belgium	SA.46013	Green electricity certificates and CHP certificates in Flanders	1 332.0
France	SA.36511	Mécanisme de soutien aux énergies renouvelables et plafonnement de la CSPE	1 308.2
Sweden	SA.34276	Förlängning av skattelättnader för tillverkningsindustrin - nedsättning av energiskatten på el.	1 286.6
Germany	SA.42393	Reform of support for cogeneration in Germany	1 225.8
France	SA.51685	Taux réduit et remboursement partiel de TICPE sur le gazole non routier et les gaz de pétrole liquéfiés utilisés comme combustible applicable au secteur agricole	1 057.0

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
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)	1 035.0
United Kingdom	SA.44622	Modification of the Renewable Heat Incentive (RHI) Scheme	989.1
France	SA.40805	application d''un taux réduit de TICPE aux installations grandes consommatrices en énergie	903.0
Germany	SA.39552	Verwendung von Energieerzeugnissen in begünstigten Anlagen gemäß § 3 und § 3a Energiesteuergesetz (Anzeige aufgrund Neufassung der AGVO)	730.0
Italy	SA.38635	Reductions of the renewable and cogeneration surcharge for electro-intensive users in Italy	629.0
Netherlands	SA.34411	SDE +	612.8
Poland	SA.34674	Free allowances to power generators under Article 10c of the ETS Directive	603.4
Austria	SA.33384	Green Electricity Act 2012, Austria	586.2
Finland	SA.40799	Eriytetyn energiaverotuksen muuttaminen	583.2
Netherlands	N 478/2007	Stimulating renewable energy, modification of the MEP (N 707/02)	559.0
France	SA.40349	Tarifs d'achat pour l'énergie solaire	504.8
Austria	SA.40192	Energieabgabenvergütung für Produktionsbetriebe	450.0
Germany	SA.49807	Energiesteuerentlastung für Betriebe der Land- und Forstwirtschaft für Gasöl nach § 57 Absatz 5 Nummer 1 Energiesteuergesetz	443.0

Heritage conservation

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Poland	SA.36222	Modification of the aid to promote cultural heritage conservation in salt mine of Wieliczka (ex NN 66/2010)	10.4
Poland	SA.51767	Culture and heritage conservation in the Bochnia salt mine	3.9
Poland	SA.38122	Aid to promote heritage conservation in the 'Guido' and 'Królowa Luiza' coal mines	1.1

Promotion of export and internationalisation

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Spain	SA.35550	'Spanish Goodwill III' - tax amortisation of financial goodwill for foreign shareholding acquisitions	904.9
Italy	526/1982	Contributi in conto interessi per credito all'esportazione (Legge. 227/77 Ossola e 526/82)	64.9
Finland	93-018E	Finnfund (Finnish Fund for Industrial Cooperation)	10.0
Belgium	NN 76/1995	MESURES EN FAVEIR DE LA PROMOTION DE L'EXPORTATION (REGION FLAMANDE)	8.1
Italy	NN 124/1992	Norme sulla promozione della partecipazione a società ed imprese miste all'estero (SIMEST) Legge 100/90 art. 4	4.2
Belgium	N 636/1998	Uitrustingsgoederen	2.5
Luxembourg	Mesures et interventions destinées à faciliter l'expansion commerciale à l'étranger	Mesures et interventions destinées à faciliter l'expansion commerciale à l'étranger	1.8

Regional development

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
France	SA.53953	Exonération des cotisations sociales patronales de sécurité sociale	1 359.9
Italy	SA.48060	Credito d''imposta alle imprese che effettuano l''acquisizione di beni strumentali nuovi destinati a 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.	1 126.0
France	SA.37183	Plan France Très Haut Débit	676.0

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
France	SA.55503	Régime d’aide à l’investissement dans les départements d’outre-mer et à Saint-Martin	558.0
France	SA.46899	Operating aid scheme for outermost regions providing reductions on the Octroi de Mer Tax	389.9
Germany	SA.52163	Bund-Länder-Gemeinschaftsaufgabe "Verbesserung der regionalen Wirtschaftsstruktur" – gewerbliche Wirtschaft	372.7
Hungary	SA.50393	A beruházás ösztönzési célelőirányzat felhasználásáról 210/2014 (VIII.27.) Korm. rendelet - megfeleltetés a 2017/1084/EU bizottsági rendeletnek és költségvetésnövekedés	314.2
Germany	SA.38348	NGA Germany	239.0
Poland	X 193/2009	Program pomocy regionalnej udzielanej przedsi?biorcom prowadz?cym dzia?alno?? gospodarcz? w specjalnych strefach ekonomicznych na podstawie zezwolenia wydanego po 1 stycznia 2007 r.	223.0
Portugal	SA.42136	Evaluation Plan: Inovação Empresarial	220.7
Romania	SA.55520	Măsură de sprijin constând, în acordarea unor ajutoare de stat și ajutoare de minimis pentru îmbunătățirea competitivității economice prin creșterea productivității muncii în întreprinderi mici și mijlocii în cadrul Programului Operațional Regional 2014-2020	218.6
France	SA.50370	Aide fiscale à l''investissement outre-mer (logement social)	203.0
Portugal	SA.39993	Regime fiscal de apoio ao investimento	195.8
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.	195.4
Poland	SA.43142	"Regional investment aid scheme for the competitiveness of SMEs under the regional programme 2014-2020"	192.3
Germany	SA.38690	NGA Bayern Abänderung	167.8
Italy	SA.48248	Contratti di sviluppo 2015-2020 - National aid scheme for regional, SME, RDI and environmental aid to large investments - Evaluation Plan	162.0
Poland	SA.42799	PARP	157.9
Sweden	SA.51216	Statligt investeringsstöd för hyresbostäder och bostäder för studerande	149.5
Poland	SA.44348	Kredyt na innowacje technologiczne.	147.2
Hungary	SA.50407	a Modern Városok Program megvalósításáról szóló 250/2016. (VIII. 24.) Korm. rendelet	140.4
France	SA.53952	Zones franches d’activité	123.0

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Poland	SA.43141	Pomoc inwestycyjna na infrastrukturę lokalną w ramach regionalnych programów operacyjnych na lata 2014-2020	119.1
Poland	SA.43247	Regionalna pomoc inwestycyjna w ramach regionalnych programów operacyjnych na lata 2014-2020	114.6
France	SA.38641	Taux d''accise réduit sur le rhum "traditionnel" produit en Guadeloupe, en Guyane, en Martinique et à La Réunion	113.0

Rescue & Restructuring

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Croatia	SA.49619	Rescue aid in favour of Uljanik Shipyard - Croatia	266.6
Italy	SA.52170	Rescue aid to Condotte in A.S.	90.0
Belgium	SA.33926	Interventions de la région wallonne en faveur de Duferco	45.3
Italy	C 64/1998	Aid granted to Istituto Poligrafico e Zecca dello Stato and its controlled companies	33.0
Italy	SA.49901	Restructuring aid to Aerdorica S.p.A – Airport Marche/Ancona	25.0
Spain	SA.47595	SME - Restructuring aid scheme Bideratu	4.0
Croatia	SA.36143	Pre-accession Croatia – 3.Maj	3.0
United Kingdom	SA.54766	Rescue aid to Wrights Group Ltd	2.8
United Kingdom	SA.49241	Welsh Government Rescue and Restructuring Scheme for non-financial SME’s in difficulty	2.5
Austria	SA.41373	Guarantee scheme for SMEs in difficulty in the tourism and leisure sector in Austria	1.3
Croatia	SA.48121	Restructuring of Jadroplov Split	0.7
Austria	SA.38117	Prolongation of a R&R scheme for SMEs in Burgenland	0.2
Austria	SA.41372	Restructuring aid scheme "TOP-Tourismus-Förderung, Teil D"	0.1
Austria	SA.40973	R&R aid scheme "Unternehmenserhaltende Maßnahmen" for SMEs in Carinthia (Austria)	0.1
Germany	SA.35894	Prolongation of the R&R scheme for SMEs "Liquidity fund II Berlin"	0.1
Netherlands	SA.55227	Rescue aid to AEB Holding N.V.	0.1

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Austria	N 521/2009	Prolongation of N 72/2007 – Prolongation of the restructuring aid scheme TOP-Tourismus-Förderung, Teil D (TOP-Restrukturierung)	0.0
Austria	SA.37750	Prolongation of the restructuring aid scheme TOP-Tourismus-Förderung, Teil D (TOP-Restrukturierung)	0.0

Research and development including innovation

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
United Kingdom	SA.41386	SME R&D Tax Credits -	2 250.2
Germany	SA.55036	Förderprogramm „Technologieorientierte Unternehmensgründungen“ BayTOU	2 178.0
France	SA.40391	Régime cadre RDI 2014-2020 - plan d'évaluation	884.6
Poland	SA.41471	National Research and Development Centre -	823.1
Belgium	SA.20326	Mesures de dispense partielle de précompte professionnel en faveur de la R&D	703.3
United Kingdom	SA.55252	UKRI Innovate UK - Research, Development and Innovation Scheme	535.4
France	SA.44531	Crédit d''impôt innovation	195.0
Italy	SA.33100	Aid in favour of industrial and precompetitive R&D and general training measures	179.3
Finland	SA.40749	Tukiohjelma tutkimus- ja kehittämishankkeisiin (Tekes)	174.4
Hungary	SA.49985	A Nemzeti Kutatási, Fejlesztési és Innovációs Alapból nyújtott állami támogatások - megfeleltetés a 2017/1084/EU bizottsági rendeletnek	159.9
Poland	SA.42839	Pomoc na badania podstawowe, badania przemysłowe, eksperymentalne prace rozwojowe oraz studia wykonalności w ramach regionalnych programów operacyjnych na lata 2014-2020	158.7
Belgium	SA.52328	Décret wallon sur l'innovation	151.8
Germany	SA.51595	Forschungsförderung im 6. Energieforschungsprogramm der Bundesregierung	146.4
France	SA.47101	Régime de soutien français à l''innovation et au développement durable du transport aérien	145.5
United Kingdom	SA.55797	Floating Wind Technology Acceleration Competition	141.8

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Spain	SA.45828	INV - Régimen de CDTI de ayudas a proyectos de I+D	112.0
Belgium	SA.49178	Besluit Ontwikkeling en Innovatie	108.9
Belgium	SA.49177	Besluit O&O Kennisintensief	104.8
Germany	SA.40231	Unternehmen Region - die BMBF-Innovationsinitiative für die neuen Länder	97.4
Germany	SA.34309	IKT 2020. R&D&I-scheme. Germany	97.3
Hungary	SA.39819	Kutatás-fejlesztési és innovációs támogatás a Gazdaságfejlesztési és Innovációs Operatív Programból (GINOP)	86.8
Italy	SA.39762	Regolamento regionale della Puglia per gli aiuti in esenzione (Reg. regionale n. 17 del 30/09/2014-BURP 06/10/2014) Aiuti a favore di investimenti in Ricerca, Sviluppo e Innovazione	82.0
Austria	SA.40732	Themen-FTI-Richtlinie	81.1
Austria	SA.40739	FFG-RL Industrie	80.2
Ireland	SA.39318	Research Development and Innovation Group Block Exemption Scheme 2014- 2020	78.7

Sectoral development

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Germany	SA.48384	Support of operational measures for the implementatoin of the national cycling plan 2020	4 852.0
France	C 25/2008	Retraites France Télécom - FR	2 322.0
Germany	SA.51956	Partial financing of rail infrastructure charges	333.3
Hungary	SA.38454	Possible aid to the Paks nuclear power station	231.9
Belgium	SA.41330	Prolongation du régime de taxe au tonnage Belgique	158.4
Sweden	SA.38240	Sjöfartsstöd	147.2
Denmark	SA.31227	Legislative Proposal L 203 on Gaming Duties	139.6
France	SA.41528	Appels d'offres pour le développement des installations PV	134.1
Denmark	SA.51325	Extension of the Danish DIS seafarer regime to certain specialized vessels	127.2
France	SA.30481	State Aid in favour of Agence France-Press (AFP)	124.6

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Netherlands	NN 98/1997	Tonnage Tax	119.0
Poland	SA.52832	Amendments to the closure plan for the Polish coal mining sector in the period 2015-2023	117.2
France	SA.51619	Régime d''aides exempté de notification relatif aux aides au dragage d''entretien dans les ports maritimes et intérieurs	94.5
Greece	SA.50233	E65 Motorway Concession (Lamia- Xiniada Section)	92.2
Finland	SA.35110	Prolongation of the reimbursement scheme for social security costs and costs related to personal income taxation in the maritime transport sector	86.8
Denmark	N 171/2004	Changes to Tonnage Tax	81.7
Germany	SA.44732	Erhöhung des Lohnsteuereinbehalts in der Seeschifffahrt	80.0
France	SA.51296	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	71.7
Spain	NN 155/1997	Reduction in Corporate Tax in the Canary Islands Ship Register	67.7
France	N 298/2001	Exonération des taxes en faveur des médicaments orphelins	67.0
Austria	SA.41175	Broadband Austria 2020	64.4
Germany	SA.41416	NGA Scheme Baden-Württemberg	59.6
Belgium	SA.43117	Prolongation de l'Aide à la marine marchande, aux secteurs du dragage et du remorquage	59.5
Denmark	SA.54792	Driftsstøtte til regional lufthavn	56.3
Sweden	SA.42308	Press aid to newspapers (SA.23923, E4/2008)	54.6

SMEs including risk capital

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
United Kingdom	SA.49923	Amendments to the existing aid scheme "Enterprise Investment Scheme" and "Venture Capital Trust scheme"	923.9
Germany	SA.52163	Bund-Länder-Gemeinschaftsaufgabe "Verbesserung der regionalen Wirtschaftsstruktur" – gewerbliche Wirtschaft	323.0

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
France	SA.52394	Régime cadre exempté de notification relatif aux aides en faveur des PME pour la période 2014-2020	111.5
Germany	SA.51198	Richtlinien zur Durchführung des bayerischen regionalen Förderprogramms für die gewerbliche Wirtschaft (BRF)	107.6
Portugal	SA.39994	Dedução por lucros retidos e reinvestidos.	83.4
Italy	SA.44007	Fondo di garanzia per le piccole e medie imprese	81.0
Portugal	SA.41943	Qualificação e Internacionalização PME	77.0
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	72.2
Italy	SA.42274	Criteri applicativi per il fondo di rotazione nei settori artigianato, industria, commercio e servizi Criteri applicativi per il fondo di rotazione e i contributi a fondo perduto per il settore turismo	60.5
Italy	SA.40429	Finanziamenti per l''acquisto di nuovi macchinari, impianti e attrezzature da parte delle piccole e medie imprese	60.0
Italy	SA.47180	SME investment aid scheme for purchase of new machinery and equipment -	53.6
Italy	SA.52301	PO FESR 2014/2020 -Azione 3.5.1_01-Aiuti alle imprese in fase di avviamento- Bando sportello in esenzione	48.7
Italy	SA.40795	Aiuti alle imprese L.P. n. 6/99	43.2
Italy	SA.48570	Fiscal incentives for investments in innovative start-ups and innovative SMEs	42.1
Poland	SA.41471	National Research and Development Centre -	37.7
Belgium	SA.41843	Incitants régionaux en faveur des PME	37.2
Croatia	SA.41208	Program dodjele državnih potpora za razvoj malog i srednjeg poduzetništva	35.6
Italy	SA.50275	Finanziamento per l''acquisto di nuovi macchinari, impianti e attrezzature da parte delle PMI.	33.7
France	SA.34420	Modification du FNA	31.0
Italy	SA.52296	PO FESR 2014/2020- Azione 3.1.1_02 a -Aiuti in esenzione in favore di piccole e medie imprese con procedura valutativa a sportello	29.3
Germany	SA.46308	INVEST - Grant for risk capital	28.4
Finland	SA.50263	Yrityksen kehittämisavustus Yritysten toimintaympäristön kehittämisavustus	27.9
Netherlands	SA.39243	SEED Capital regeling	23.8
Germany	SA.40234	Entwicklungsprogramm Ländlicher Raum (ELR-Programm)	23.2

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Netherlands	SA.53899	NL_BZK_CSDO_GD_Beleidsregel Operationeel Programma EFRO Oost-Nederland 2019	22.1

Social support to individual consumers

Member State	SA Number	Working Title	Expenditure 2019 (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	3 622.0
Spain	SA.51878	TRTEL-Subvenciones al transporte aéreo de residentes en regiones alejadas	671.0
Spain	SA.41993	TRTEL - Subvenciones al transporte marítimo de pasajeros residentes en regiones no peninsulares	159.5
France	SA.41298	Dispositif régional de continuité territoriale	53.8
France	SA.39987	Modification of a social aid scheme for the benefit of certain French overseas territory residents	41.2
Spain	SA.45138	TRTEL - Bonificaciones al transporte marítimo interinsular e intrainsular de viajeros residentes en Canarias	30.9
France	N 495/2010	Aide à la protection sociale complémentaire	16.2
France	N 628/2008	Aide à la protection sociale complémentaire des militaires	10.2
France	N 912/2006	Notification d'un régime d'aides individuelles à caractère social au titre de l'article 87.2.a) du traité CE, concernant la desserte aérienne intérieure à la Guyane	8.9
France	SA.42680	Régime d'aides visant à l'instauration d'un dispositif d'accompagnement temporaire de certains foyers lors des opérations de libération de la bande 700 MHz au profit des services mobiles	8.9
France	SA.33966	Aide à caractère social pour les dessertes maritimes exploitées entre la Guadeloupe et les îles	4.4
France	N 911/2006	Aide à la protection sociale complémentaire des agents de l'État	2.2
Portugal	SA.44819	Subsídio social de mobilidade nas ligações entre a ilha da Madeira e do Porto Santo	1.1
Poland	SA.42843	Compensation for the provision of services which are statutorily exempted from postage fees (2016-2021)	0.7
Italy	SA.53376	Liberation of the 700 MHz band - Reception aid to low income households - Italy	0.3

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Germany	SA.42392	Prolongation of the exemption from air transport tax as regards flights of people domiciled on islands and other cases	0.1
Greece	SA.53520	Primary Residence Protection Scheme	0.0

Training

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
United Kingdom	SA.45031	The European Social Fund Training Aid State Aid Scheme (the “Scheme”)	2 380.5
Italy	SA.40411	Regolamento per i Fondi Interprofessionali per la formazione continua per la concessione di Aiuti di Stato esentati ai sensi del Regolamento (CE) n. 651/2014	156.9
Netherlands	SA.50131	Subsidie opleidingen SectorplanPlus	140.9
Hungary	SA.56191	A szövetkezeti hitelintézeti integrációban megvalósítandó képzési program (módosítás: költségvetés megemelése)	54.2
Germany	SA.44345	Förderrichtlinie Ausbildung zum Berufskraftfahrer/in in Unternehmen des Güterkraftverkehrs mit schweren Nutzfahrzeugen	37.2
Croatia	SA.50553	Program državnih potpora za zapošljavanje i usavršavanje u nadležnosti Hrvatskog zavoda za zapošljavanje za razdoblje od 2018.-2020. godine	34.6
France	SA.40207	Régime exempté d''aides à la formation	28.1
Italy	SA.51163	Credito d''imposta per la formazione per le tecnologie abilitanti - Industria 4.0	23.0
Belgium	SA.54202	Strategische transformatiesteun aan ondernemingen in het Vlaamse Gewest	20.0
United Kingdom	SA.35094	UK Support for Maritime Training (SMarT)	18.8
Ireland	SA.39312	Training Support Scheme 2014-2020 (General Block Exemption Regulation)	15.8
Germany	SA.41881	ESF-Bundesprogramm "Fachkräfte sichern: weiter bilden und Gleichstellung fördern" (Sozialpartnerrichtlinie)	15.2
Italy	SA.33235	Training Aid	9.8
Germany	SA.41879	ESF-Bundesprogramm "rückenwind - Für die Beschäftigten und Unternehmen in der Sozialwirtschaft"	9.4

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Germany	SA.41415	Kompetenzentwicklung von Beschäftigten durch Bildungsscheckverfahren	8.4
Belgium	SA.55957	Incitants financiers à la Formation des travailleurs occupés par les entreprises	8.3
Austria	SA.40434	Qualifzierungsförderung für Beschäftigte (QBN)	8.3
Germany	SA.42650	Richtlinie über die Gewährung von Zuwendungen zur Förderung von Maßnahmen im Rahmen des Programms "Weiterbildung in Niedersachsen"	8.0
United Kingdom	SA.49664	Welsh Government Support for Training Scheme	6.3
United Kingdom	SA.40270	Skills, Strategy and Innovation Solutions	6.1
Hungary	SA.45290	Beruházásösztönző célú képzési támogatás	6.1
Germany	SA.45189	Förderrichtlinie Weiterbildung in Unternehmen des Güterkraftverkehrs mit schweren Nutzfahrzeugen	6.1
Belgium	XT 40/2004	Incitants financiers à la formation des travailleurs d'entreprises - Crédit-adaptation	5.8
United Kingdom	SA.39218	Scottish Enterprise Training Scheme 2014 - 2020	5.0
Lithuania	SA.48526	2014–2020 metų Europos Sąjungos fondų investicijų veiksmų programos 9 prioriteto „Visuomenės švietimas ir žmogiškųjų išteklių potencialo didinimas“ priemonė Nr. 09.4.3-ESFA-T-846 „Mokymai užsienio investuotojų darbuotojams“	4.9

Other

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
Sweden	SA.38469	Sheltered employment in Sweden	574.5
Germany	SA.55394	Rescue Aid to Condor	380.0
Germany	SA.46578	IPCEI on Microelectronics - Germany	353.4
Italy	SA.38613	Aid to Ilva	300.0
Czechia	SA.33575	Support from central government to non-profit sport facilities	247.4
Italy	SA.41647	Italy - Strategia Banda Ultra Larga	234.3

Member State	SA Number	Working Title	Expenditure 2019 (aid element) in EUR million
France	SA.49469	Compensation de la mission d''aménagement du territoire en faveur de La Poste pour la période 2018-2022	171.0
Spain	SA.53925	Broadband scheme for NGA white and grey areas - Spain	140.2
France	SA.48883	Dispositif compensatoire pour la mission de transport et de distribution de la presse pour 2018-2022 - Nnotification	103.8
France	SA.49875	Modification of the scheme in favour of undertakings exposed to a carbon leakage risk in France	102.1
United Kingdom	SA.44465	Northern Irish Capacity Mechanism: reliability option scheme	77.1
Italy	SA.48492	Compensation to Poste Italiane for reduced tariffs for publishers and not-for profit organizations 2017-2019	66.9
Spain	SA.38397	Corporate tax exemption for port authorities in Spain	65.7
Malta	SA.45779	Delimara Gas and Power Energy Project	62.7
Slovakia	N 506/2010	Partial financing of decommissioning of two already shut down nuclear plants (A1 and V1)	62.0
Sweden	SA.49708	Statligt stöd inom det svenska landsbygdsprogrammet till bredband	58.5
Denmark	SA.36366	Production and innovation aid to written media	52.7
Poland	SA.46891	Restructuring of the Polish mining companies	52.3
Greece	SA.48780	Prolongation of the Greek interruptibility scheme	48.9
Croatia	SA.48472	Amended Concession Agreement relating to the Istrian Y motorway	46.2
Sweden	SA.56017	Regionalt transportbidrag - budgetjustering	41.3
Bulgaria	SA.26212	Forest land swaps	40.8
Greece	SA.50152	New Greek transitory flexibility mechanism	40.8
United Kingdom	SA.40720	National Broadband Scheme for the UK for 2016-2020	32.7
Finland	SA.46556	Aid to the central and regional trotting tracks in Finland	32.5

Annex IV. Focus on State aid expenditure in Member States

1. Member State focus 2019 - Austria

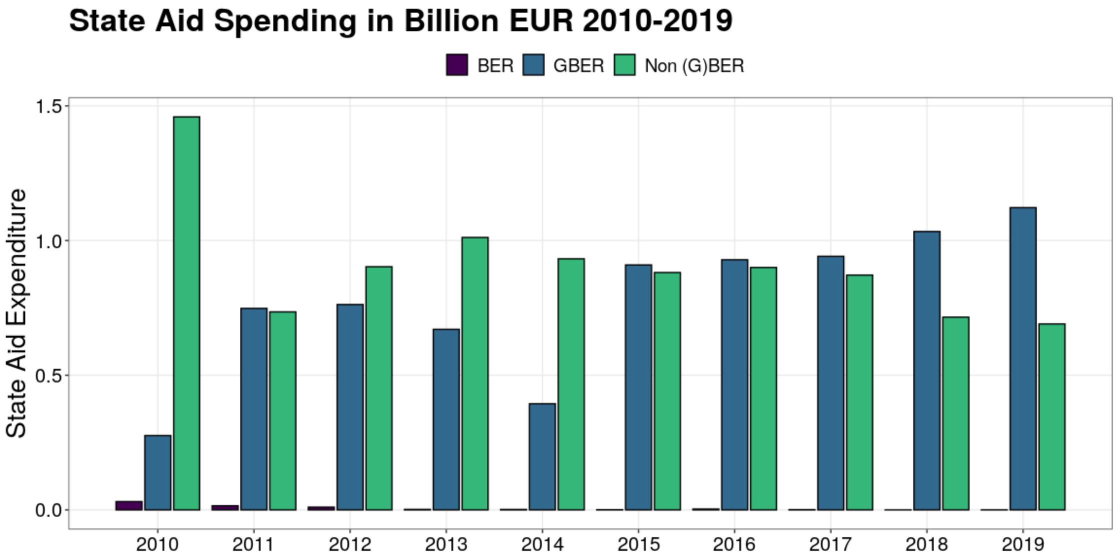
1. Case and procedural information

The total number of active measures corresponded to **174 in 2019** of which 148 GBER (X), **24 notified (N)** and 2 **BER**.

In 2019, the share of **GBER** measures in Austria reached **85.1%** of the total, with 91.7% of all newly implemented measures falling under GBER.

2. State aid spending - overview

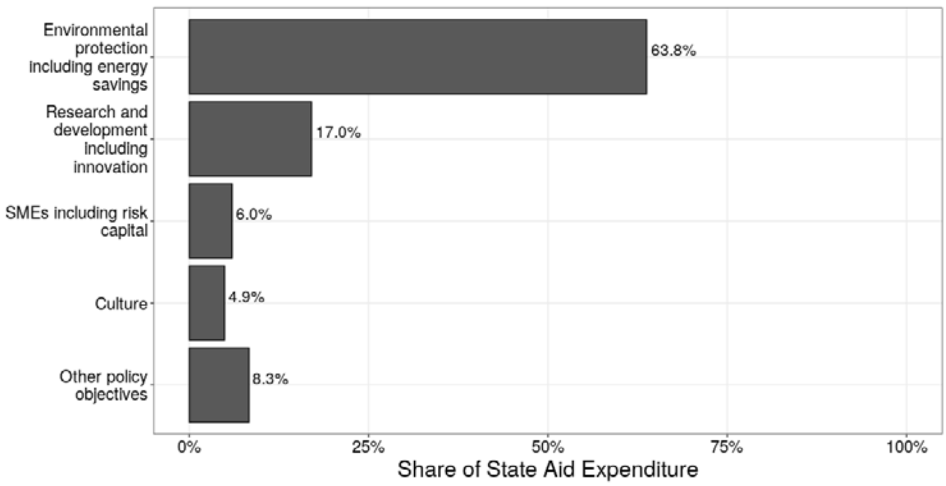
Between 2010 and 2019 Austria spent **EUR 17 billion** for non-agricultural State aid, of which around **EUR 9.1** billion under notified measures and around **EUR 7.9 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Austria absorbed **68.7%** of the total spending (around EUR 1.81 billion).

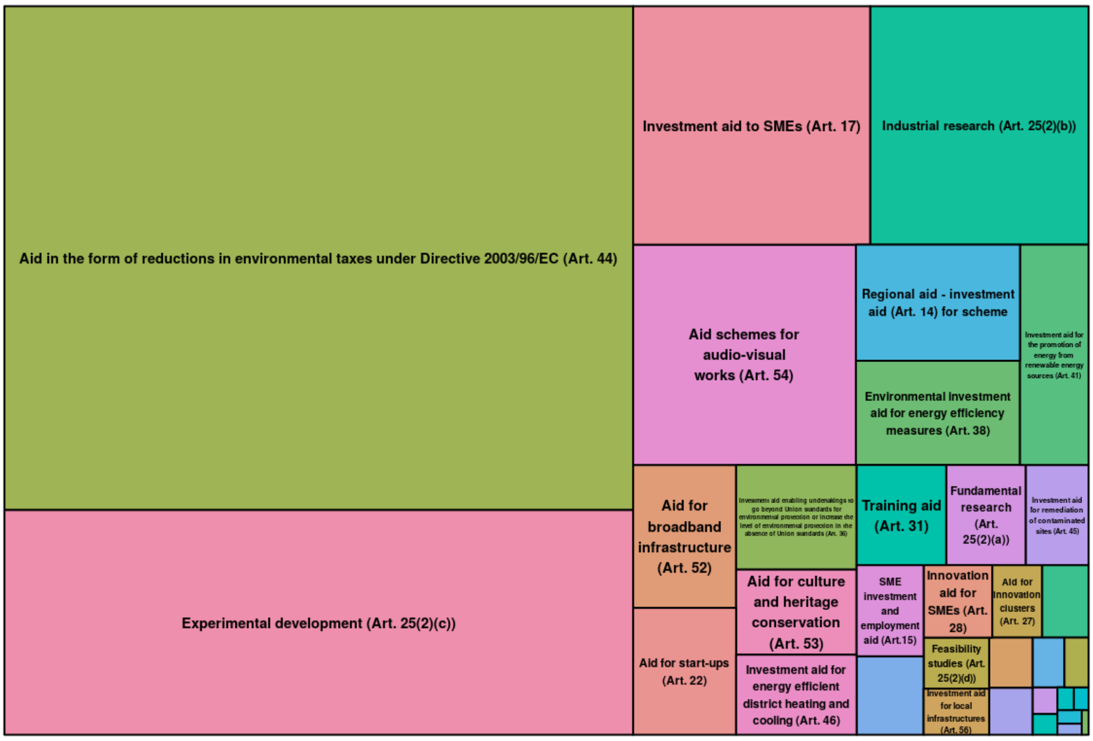
Finally, the amount of co-financed in Austria corresponded to **EUR 315 million** (around **17.4%** of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (54.67%)**, **Environmental protection including energy savings (18.76%)** and **SMEs including risk capital (16.7%)**.

3. State aid Spending – Top objectives & instruments



Around 80.8% of State aid spending in Austria was concentrated in two main policy objectives. Around **63.8%** was directed towards **"Environmental protection including energy savings"** while **17%** to **"Research and development including innovation"**.

Austria devoted around 6% towards "SMEs including risk capital" and 4.9% to "Culture".



The top 4 key articles absorbed about 71.8% of the total GBER spending. The most widely used is **"Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)", (40.1%),** followed by **"Experimental development (Art. 25(2)(c))", (17.9%), "Investment aid to SMEs (Art. 17)", (7.2%), "Industrial research (Art. 25(2)(b))", (6.6%).**

In terms of **State aid instruments**, Austria privileged the use of "**Direct grant**" (around EUR 692 million, 38.2% of total State aid spending), followed by "**Direct grant/ Interest rate subsidy**" (EUR 628 million, 34.7% of total State aid spending), and "Tax advantage or tax exemption" (around EUR 450 million, 24.8% of total State aid spending).

2. Member State focus 2019 - Belgium

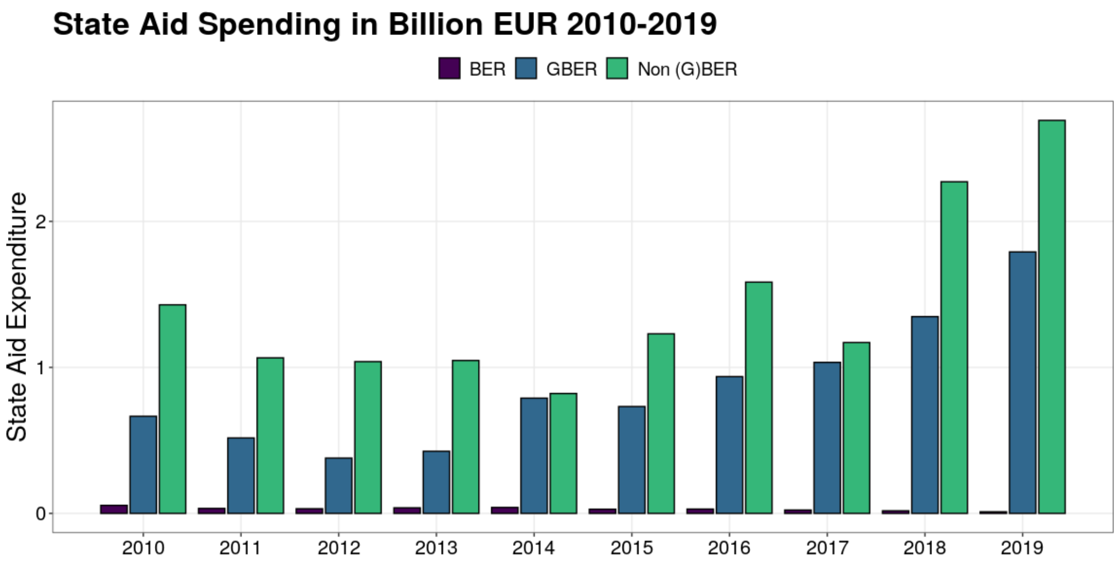
1. Case and procedural information

The total number of active measures corresponded to **190 in 2019** of which 158 GBER (X), **29 notified (N)** and 3 **BER.**

In 2019, the share of GBER measures in Belgium reached 83.2% of the total, with **97.9%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

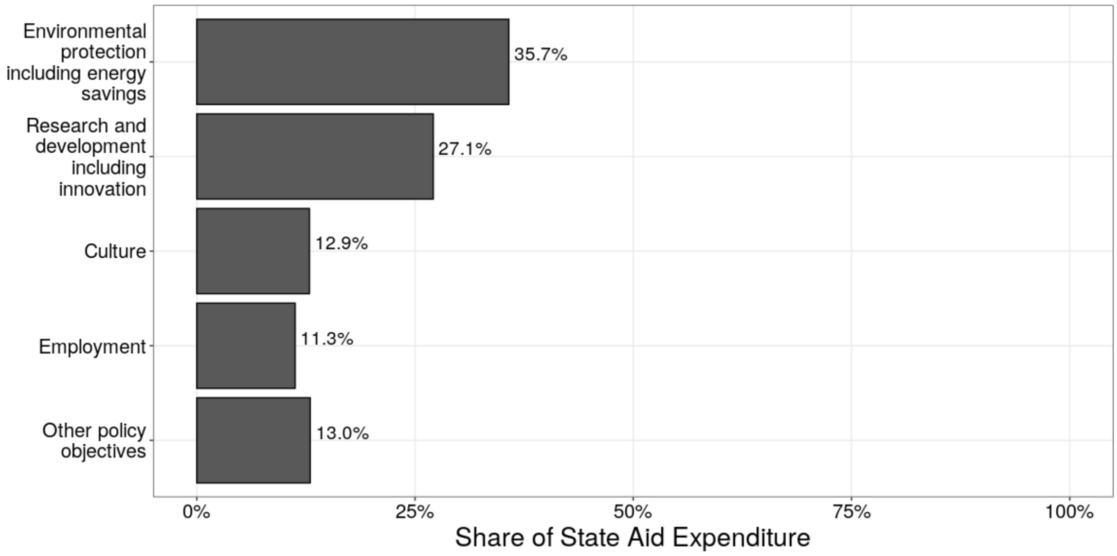
Between 2010 and 2019 Belgium spent **EUR 23.3 billion** for non-agricultural State aid, of which **around EUR 14.4 billion** under notified measures and around **EUR 8.9 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Belgium absorbed **67.4%** of the total spending (around EUR 4.49 billion).

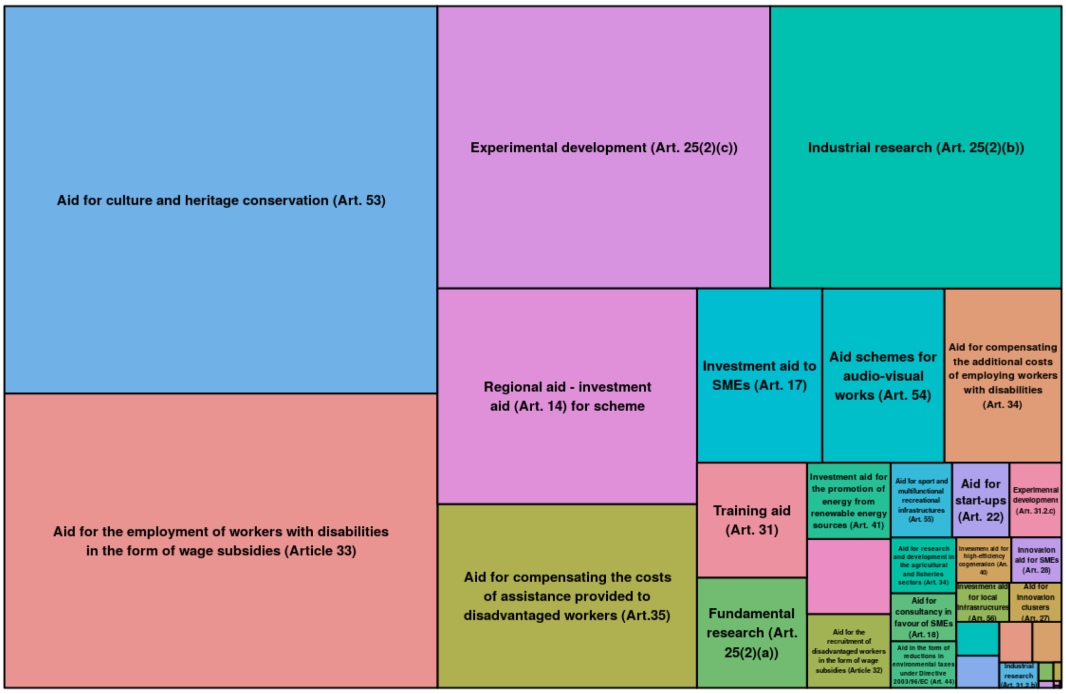
Finally, the amount of co-financed in Belgium corresponded to **EUR 207 million** (around **4.6%** of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (79.96%), Regional development (14.95%)** and **SMEs including risk capital (3.19%).**

3. State aid Spending – Top objectives & instruments



Around 62.8% of State aid spending in Belgium was concentrated in two main policy objectives. Around **35.7%** was directed towards "**Environmental protection including energy savings**" while **27.1%** to "**Research and development including innovation**".

Belgium devoted around 12.9% towards "Culture" and 11.3% to "Employment".



The top 4 key articles absorbed about 65.4% of the total GBER spending. The most widely used is **"Aid for culture and heritage conservation (Art. 53)", (23.3%),** followed by **"Aid for the employment of workers with disabilities in the form of wage subsidies (Article 33)", (17.7%), "Experimental development (Art. 25(2)(c))", (13%), "Industrial research (Art. 25(2)(b))", (11.4%).**

In terms of **State aid instruments**, Belgium privileged the use of "**Direct grant/ Interest rate subsidy**" (around EUR 1638 million, **36.5%** of total State aid spending), followed by "**Direct grant**" (EUR 1472 million, **32.8%** of total State aid spending), and "**Tax rate reduction**" (around EUR 703 million, **15.6%** of total State aid spending).

3. Member State focus 2019 - Bulgaria

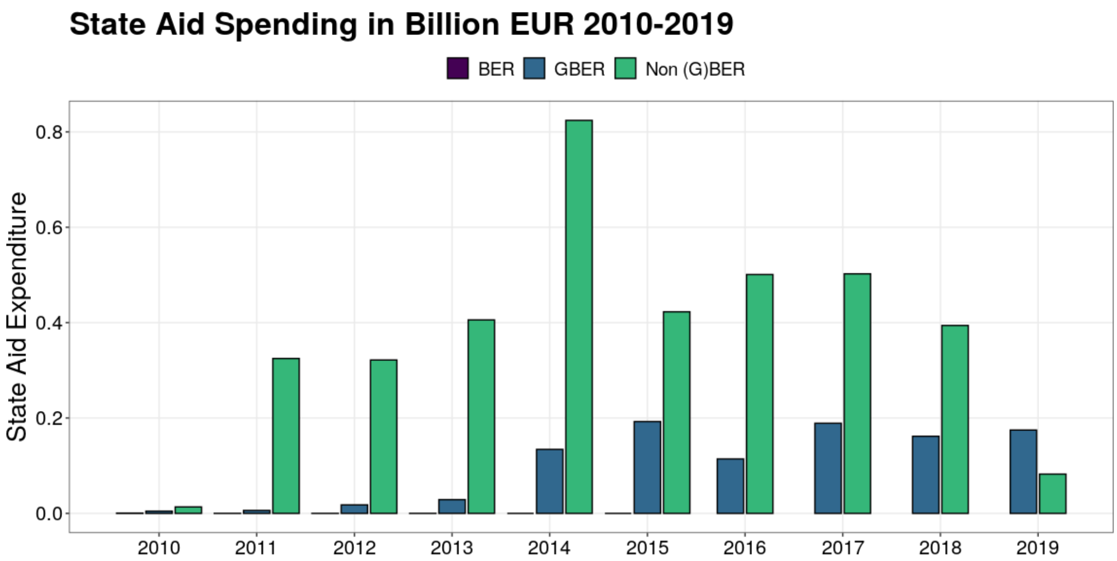
1. Case and procedural information

The total number of active measures corresponded to **29 in 2019** of which 24 GBER (X) and **5 notified (N)**.

In 2019, the share of GBER measures in Bulgaria reached 82.8% of the total, with **66.7%** of all newly implemented measures falling under GBER.

2. State aid spending - overview

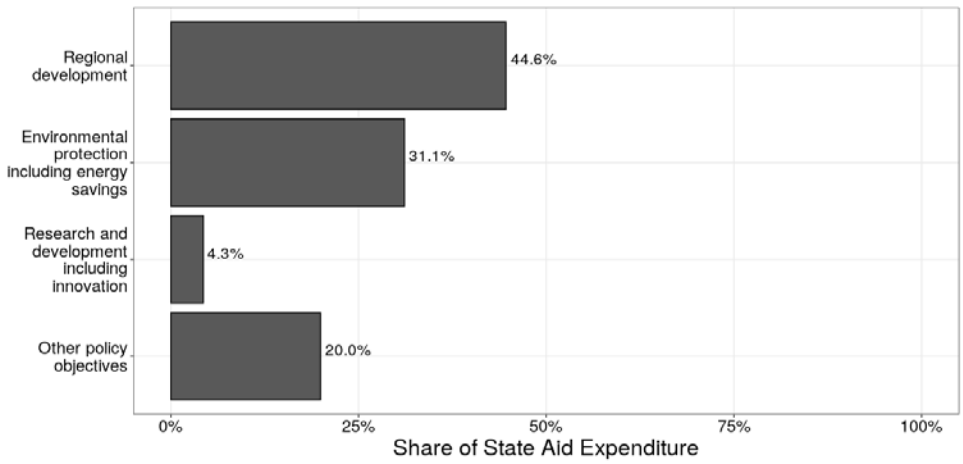
Between 2010 and 2019 Bulgaria spent **EUR 4.8 billion** for non-agricultural State aid, of which around **EUR 3.8 billion** under notified measures and around EUR 1 billion under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Bulgaria absorbed **80.6%** of the total spending (around EUR 0.26 billion).

Finally, the amount of co-financed in Bulgaria corresponded to **EUR 122 million** (around **46.9%** of the total non-agricultural spending) and was mostly concentrated in **Regional development (90.93%), Research and development including innovation (6.96%)** and **Culture (1.13%).**

3. State aid Spending – Top objectives & instruments



Around 75.7% of State aid spending in Bulgaria was concentrated in two main policy objectives. Around **44.6%** was directed towards **"Regional development"** while **31.1%** to **"Environmental protection including energy savings"**.

Bulgaria devoted around 4.3% towards "Research and development including innovation" and 20% to "Other policy objectives".

The top 4 key articles absorbed about 93.3% of the total GBER spending. The most widely used is **"Regional aid - investment aid (Art. 14) for scheme", (59.8%),** followed by **"Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)", (24.5%), "Industrial research (Art. 25(2)(b))", (5.4%), "Aid schemes for audio-visual works (Art. 54)", (3.6%).**

In terms of **State aid instruments**, Bulgaria privileged the use of **"Direct grant/ Interest rate subsidy"** (around EUR 124 million, **48.2%** of total State aid spending), followed by **"Other"** (EUR 80 million, **31%** of total State aid spending), and **"Tax advantage or tax exemption"** (around EUR 43 million, **16.6%** of total State aid spending).

4. Member State focus 2019 - Croatia

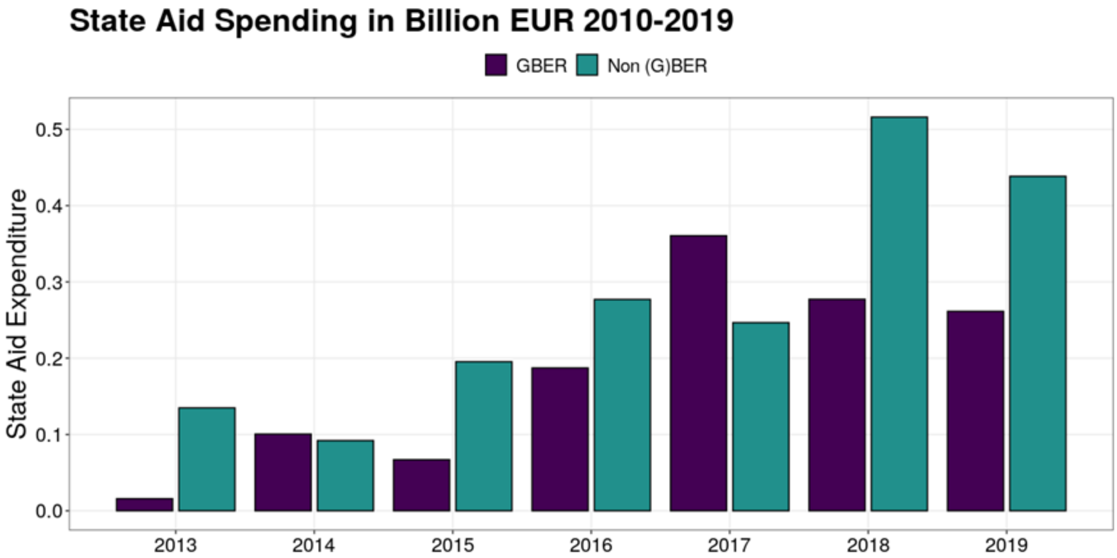
1. Case and procedural information

The total number of active measures corresponded to **34 in 2019** of which 22 GBER (X) and **12 notified (N)**.

In 2019, the share of GBER measures in Croatia reached 64.7% of the total, with 62.5% of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

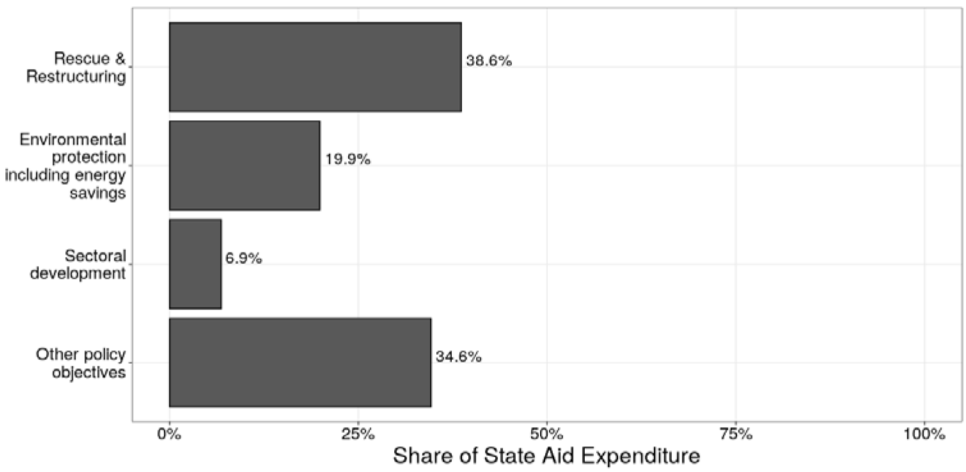
Between 2010 and 2019 Croatia spent **EUR 3.2 billion** for non-agricultural State aid, of which **around EUR 1.9 billion** under notified measures and around EUR 1.3 billion under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Croatia absorbed **74.1%** of the total spending (around EUR 0.7 billion).

Finally, the amount of co-financed in Croatia corresponded to **EUR 184 million** (around **26.3%** of the total non-agricultural spending) and was mostly concentrated in **Sectoral development (24.32%), SMEs including risk capital (23.66%)** and **Training (18.82%)**.

3. State aid Spending – Top objectives & instruments



Around 58.5% of State aid spending in Croatia was concentrated in two main policy objectives. Around **38.6%** was directed towards **“Rescue & Restructuring”** while **19.9%** to **“Environmental protection including energy savings”**.

Croatia devoted around 6.9% towards “Sectoral development” and 34.6% to “Other policy objectives”.

The top 4 key articles absorbed about 64.8% of the total GBER spending. The most widely used is **“Regional aid - investment aid (Art. 14) for scheme”, (17.9%)**, followed by **“Aid for maritime ports (Art. 56b)”, (17.1%), “Investment aid to SMEs (Art. 17)”, (16.6%), “Training aid (Art. 31)”, (13.2%).**

In terms of **State aid instruments**, Croatia privileged the use of **“Guarantee”** (around EUR 267 million, **38.1%** of total State aid spending), followed by **“Direct grant/ Interest rate subsidy”** (EUR 251 million, **35.9%** of total State aid spending), and **“Other”** (around EUR 110 million, **15.8%** of total State aid spending).

5. Member State focus 2019 - Cyprus

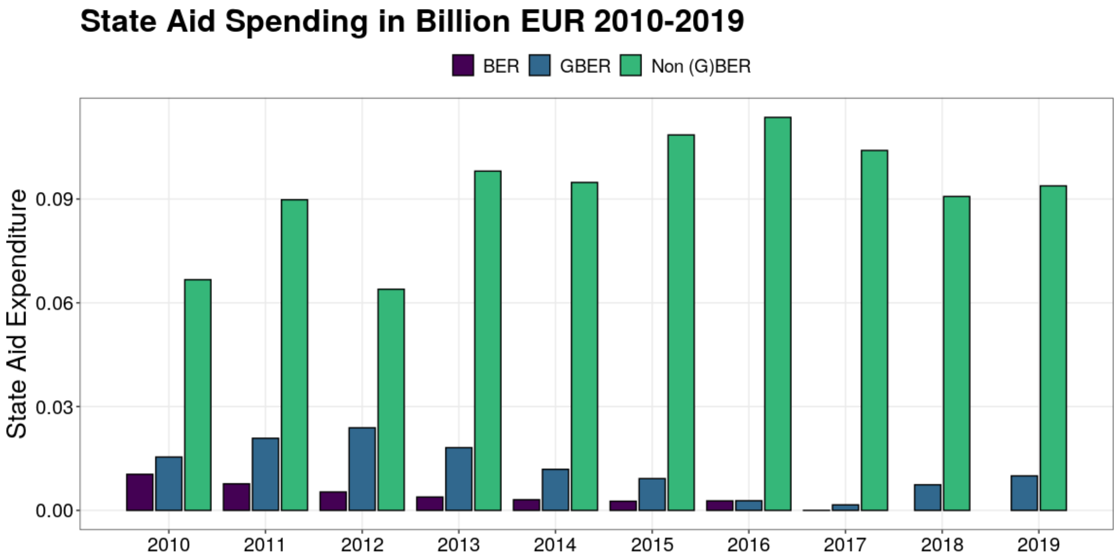
1. Case and procedural information

The total number of active measures corresponded to **18 in 2019** of which 8 GBER (X) and **10 notified (N).**

In 2019, the share of **GBER** measures in Cyprus reached **44.4%** of the total.

2. State aid spending - overview

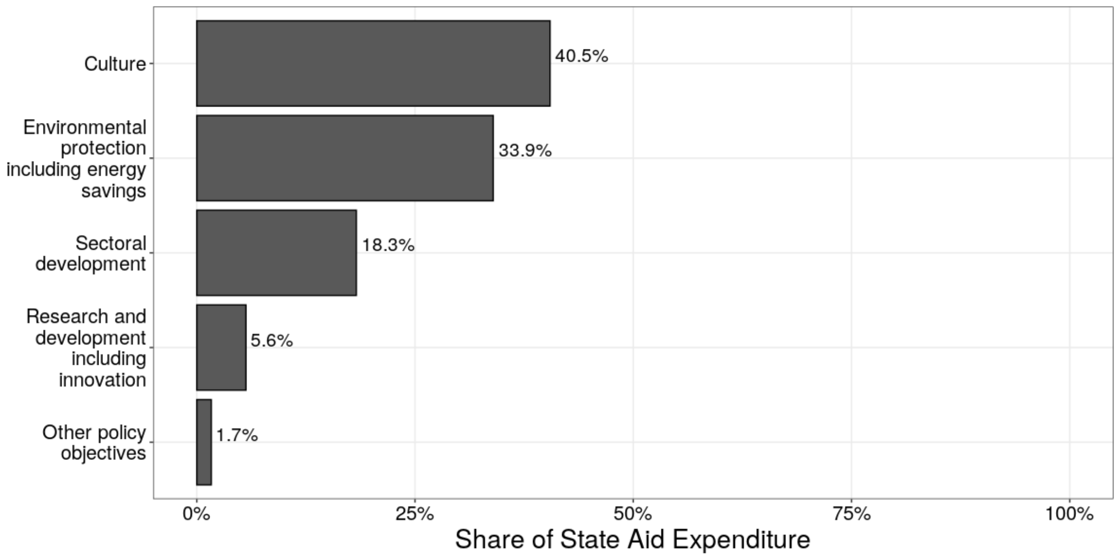
Between 2010 and 2019 Cyprus spent **EUR 1.1 billion** for non-agricultural State aid, of which around **EUR 0.9 billion** under notified measures and around **EUR 0.2 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Cyprus absorbed **92.4%** of the total spending (around EUR 0.1 billion).

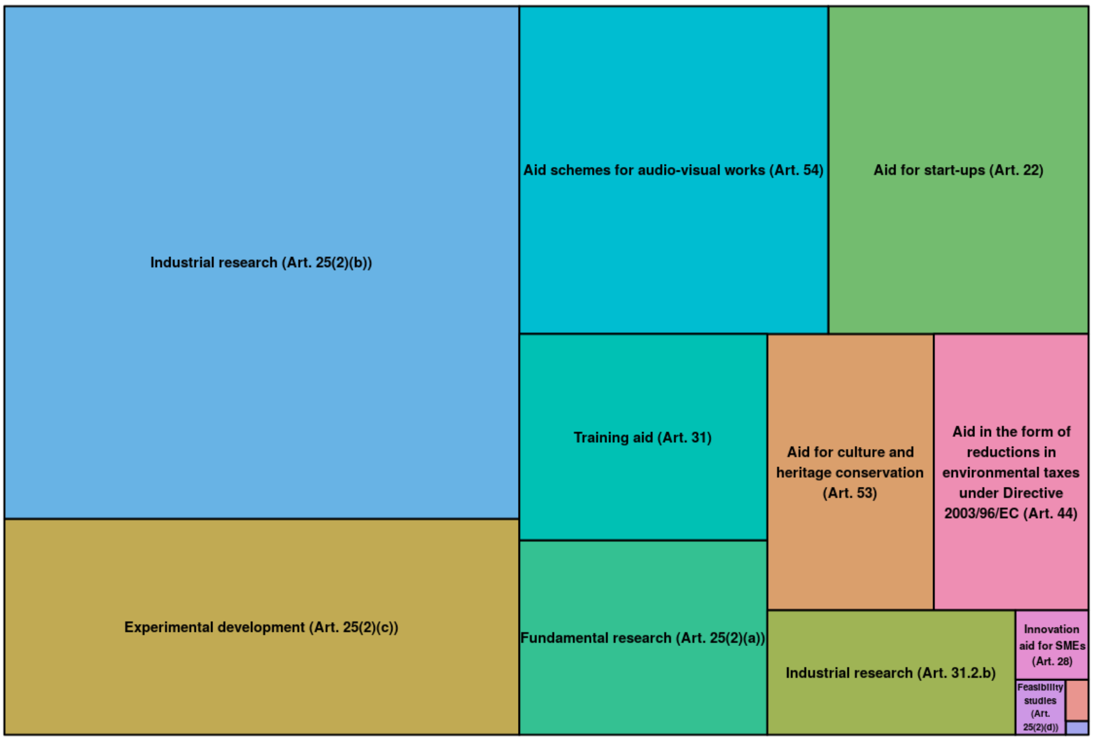
Finally, the amount of co-financed in Cyprus corresponded to EUR 5 million (around **5%** of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (100%)**.

3. State aid Spending – Top objectives & instruments



Around 74.4% of State aid spending in Cyprus was concentrated in two main policy objectives. Around **40.5%** was directed towards **“Culture”** while **33.9% to “Environmental protection including energy savings”**.

Cyprus devoted around 18.3% towards “Sectoral development” and 5.6% to “Research and development including innovation”.



The top 4 key articles absorbed about 71.1% of the total GBER spending. The most widely used is **“Industrial research (Art. 25(2)(b))”, (33.4%),** followed by **“Experimental development (Art. 25(2)(c))”, (14.1%), “Aid schemes for audio-visual works (Art. 54)”, (12.8%), “Aid for start-ups (Art. 22)”, (10.8%).**

In terms of **State aid instruments**, Cyprus privileged the use of **“Direct grant”** (around EUR 77 million, **74.6%** of total State aid spending), followed by **“Tax base reduction**” (EUR 17 million, **16.2%** of total State aid spending), and **“Other”** (around EUR 5 million, **4.8%** of total State aid spending).

6. Member State focus 2019 - Czechia

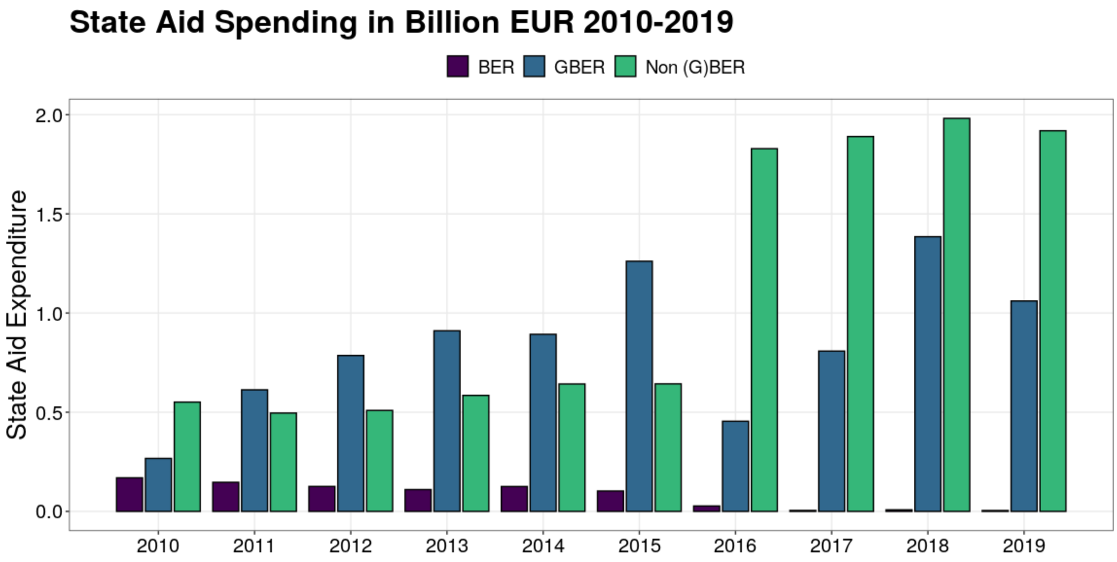
1. Case and procedural information

The total number of active measures corresponded to **227 in 2019** of which 213 GBER (X), **13 notified (N)** and 1 **BER**.

In 2019, the share of GBER measures in Czechia reached 93.8% of the total, with **99.3%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

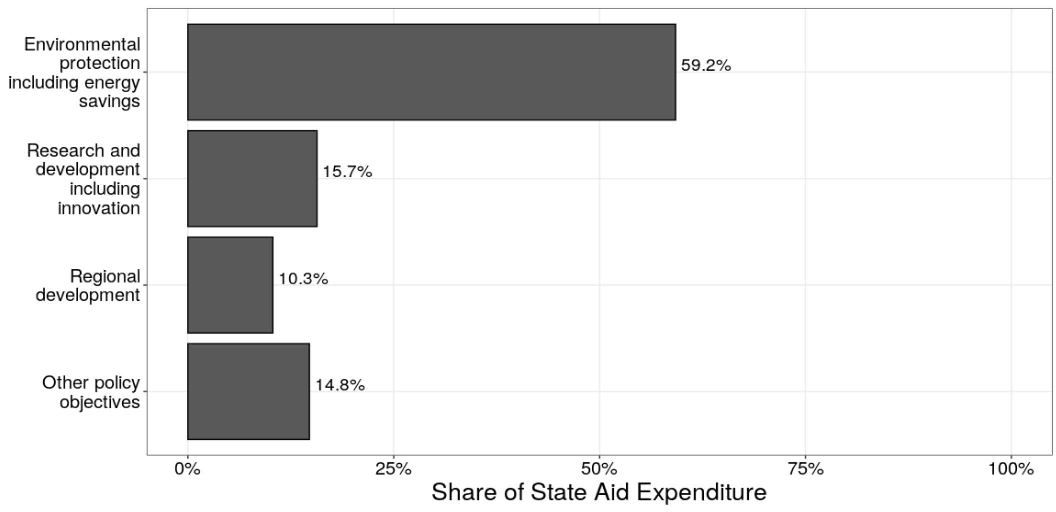
Between 2010 and 2019 Czechia spent **EUR 20.3 billion** for non-agricultural State aid, of which around **EUR 11 billion** under notified measures and around **EUR 9.3 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the 5 biggest State aid measures in Czechia absorbed **72.8%** of the total spending (around EUR 2.98 billion).

Finally, the amount of co-financed in Czechia corresponded to **EUR 365 million** (around **12.2%** of the total non-agricultural spending) and was mostly concentrated **in Regional development (40.99%), Research and development including innovation (27.79%)** and **Environmental protection including energy savings (17.25%).**

3. State aid Spending – Top objectives & instruments



Around 74.9% of State aid spending in Czechia was concentrated in two main policy objectives. Around **59.2%** was directed towards **"Environmental protection including energy savings"** while **15.7%** to **"Research and development including innovation".**

Czechia devoted around 10.3% towards "Regional development" and 14.8% to "Other policy objectives".

The top 4 key articles absorbed about 59.1% of the total GBER spending. The most widely used is **"Industrial research (Art. 25(2)(b))", (23.6%),** followed by **"Regional aid - investment aid (Art. 14) for scheme", (16.5%), "Experimental development (Art. 25(2)(c))", (10.4%), "Regional aid - scheme (art. 13)", (8.6%).**

In terms of **State aid instruments**, Czechia privileged the use of **"Other"** (around EUR 1606 million, **53.8%** of total State aid spending), followed by **"Direct grant/ Interest rate subsidy"** (EUR 884 million, **29.6%** of total State aid spending), and **"Direct grant"** (around EUR 334 million, **11.2%** of total State aid spending).

7. Member State focus 2019 - Denmark

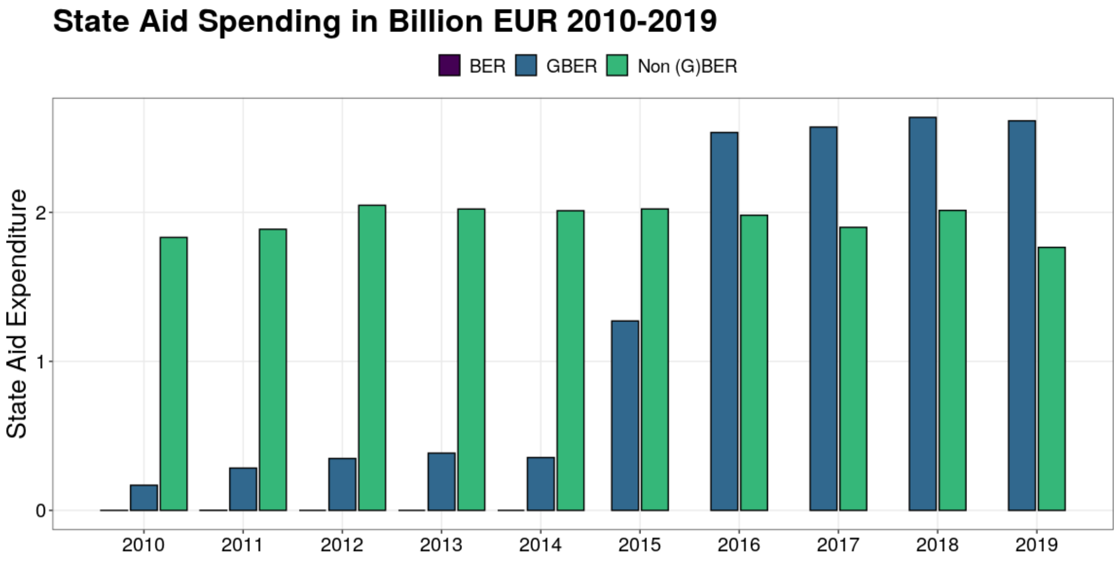
1. Case and procedural information

The total number of active measures corresponded to **111 in 2019** of which 76 GBER (X) and **35 notified (N)**.

In 2019, the share of GBER measures in Denmark reached 68.5% of the total, with **92.6%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

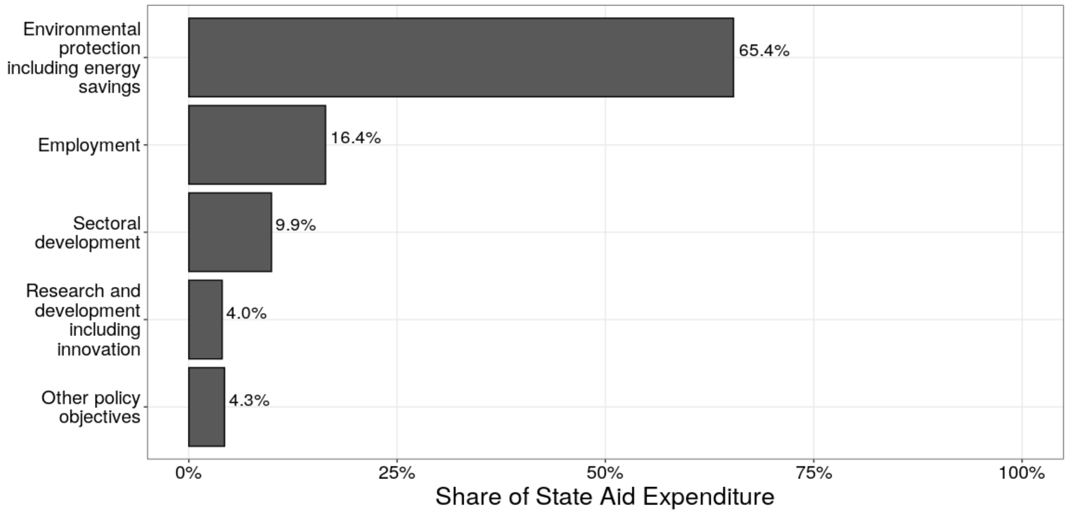
Between 2010 and 2019 Denmark spent **EUR 32.6 billion** for non-agricultural State aid, of which around **EUR 19.5 billion** under notified measures and around **EUR 13.1 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Denmark absorbed **74.9%** of the total spending (around EUR 4.38 billion).

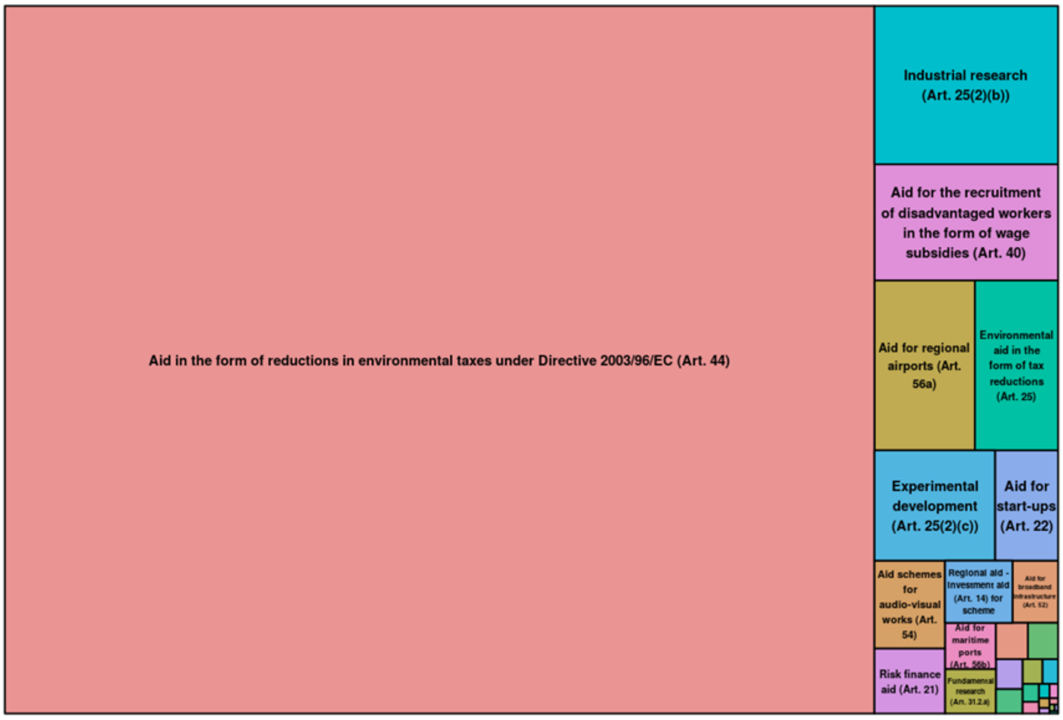
Finally, the amount of co-financed in Denmark corresponded to **EUR 44 million** (around **1%** of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (72.15%), SMEs including risk capital (27.42%)** and **Training (0.43%).**

3. State aid Spending – Top objectives & instruments



Around 81.8% of State aid spending in Denmark was concentrated in two main policy objectives. Around **65.4%** was directed towards **"Environmental protection including energy savings"** while **16.4%** to **"Employment".**

Denmark devoted around 9.9% towards "Sectoral development" and 4% to "Research and development including innovation".



The top 4 key articles absorbed about 91.7% of the total GBER spending. The most widely used is **"Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)", (82.6%),** followed by **"Industrial research (Art. 25(2)(b))", (3.9%), "Aid for the recruitment of disadvantaged workers in the form of wage subsidies (Art. 40)", (2.9%), "Aid for regional airports (Art. 56a)", (2.3%).**

In terms of State aid instruments, Denmark privileged the use of "Tax advantage or tax exemption" (around EUR 2192 million, 50% of total State aid spending), followed by **"Direct grant" (EUR 1480 million, 33.8% of total State aid spending), and "Tax rate reduction" (around EUR 267 million, 6.1% of total State aid spending).**

8. Member State focus 2019 - Estonia

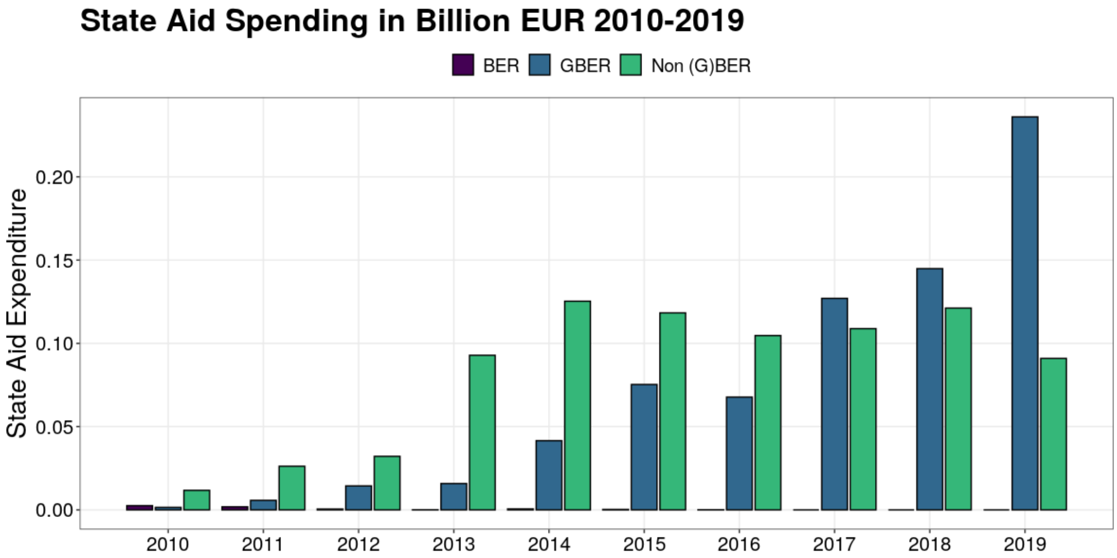
1. Case and procedural information

The total number of active measures corresponded to **72 in 2019** of which 67 GBER (X) and **5 notified (N).**

In 2019, the share of GBER measures in Estonia reached 93.1% of the total, with **100%** of all newly implemented measures falling under **GBER.**

2. State aid spending - overview

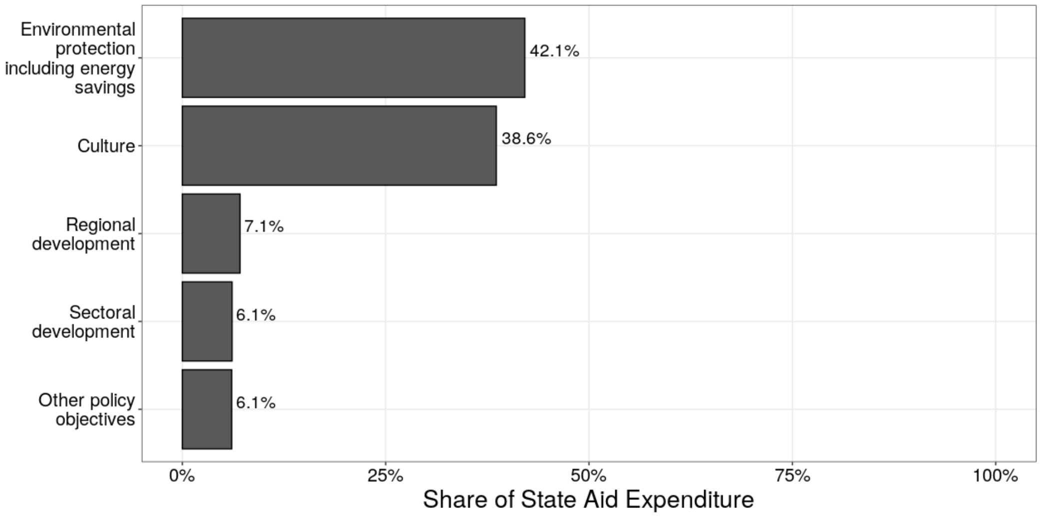
Between 2010 and 2019 Estonia spent **EUR 1.6 billion** for non-agricultural State aid, of which around **EUR 0.8 billion** under notified measures and around **EUR 0.8 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Estonia absorbed 76.6% of the total spending (around EUR 0.33 billion).

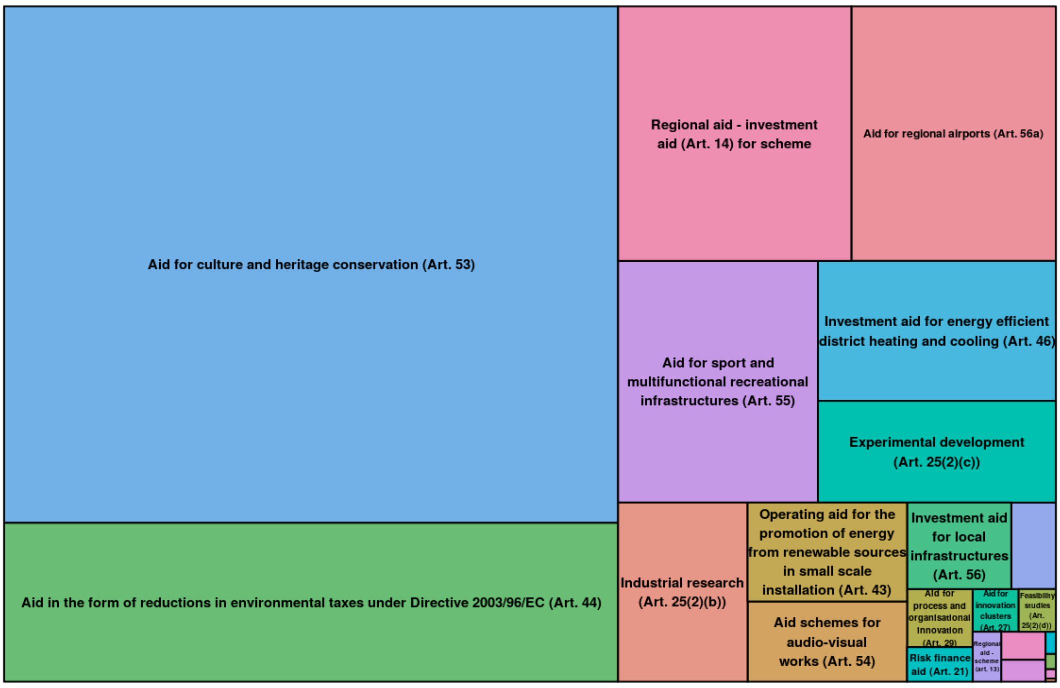
Finally, the amount of co-financed in Estonia corresponded to **EUR 69 million** (around **20.9%** of the total non-agricultural spending) and was mostly concentrated in **Regional development (29.57%), Research and development including innovation (26.26%)** and **Culture (26.13%).**

3. State aid Spending – Top objectives & instruments



Around 80.7% of State aid spending in Estonia was concentrated in two main policy objectives. Around **42.1%** was directed towards **“Environmental protection including energy savings”** while **38.6%** to **“Culture”.**

Estonia devoted around 7.1% towards “Regional development” and 6.1% to “Sectoral development”.



The top 4 key articles absorbed about 74.1% of the total GBER spending. The most widely used is **“Aid for culture and heritage conservation (Art. 53)”, (44.7%),** followed by **“Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)”, (13.7%), “Regional aid - investment aid (Art. 14) for scheme”, (8.4%), “Aid for regional airports (Art. 56a)”, (7.3%).**

In terms of **State aid instruments**, Estonia privileged the use of **“Direct grant/ Interest rate subsidy”** (around EUR 201 million, **61.6%** of total State aid spending), followed by **“Direct grant”** (EUR 91 million, **28%** of total State aid spending), and **“Tax advantage or tax exemption”** (around EUR 32 million, **9.9%** of total State aid spending).

9. Member State focus 2019 - Finland

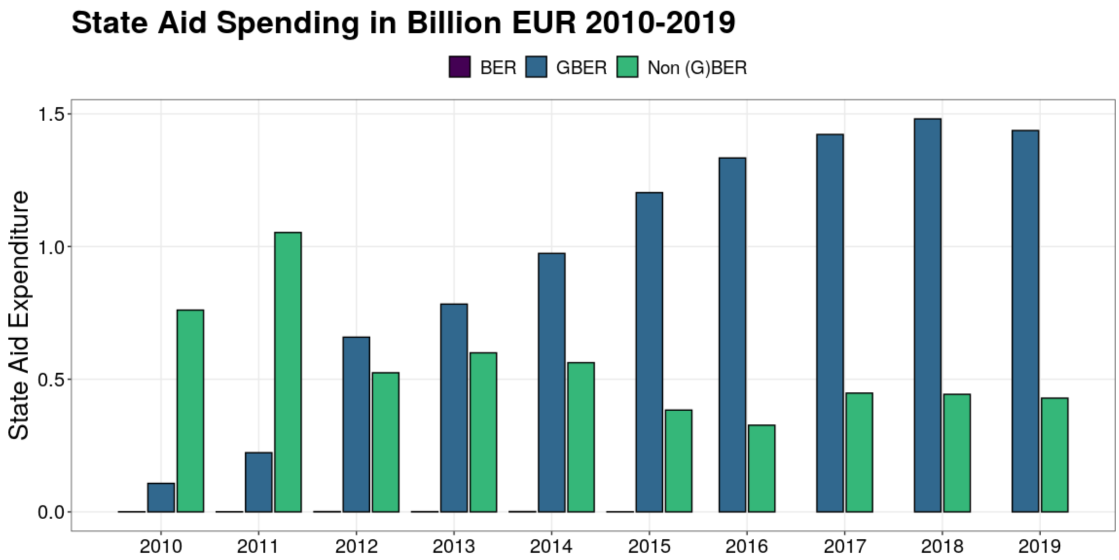
1. Case and procedural information

The total number of active measures corresponded to **58 in 2019** of which 42 GBER (X) and **16 notified (N).**

In 2019, the share of GBER measures in Finland reached 72.4% of the total, with **85.7%** of all newly implemented measures falling under **GBER.**

2. State aid spending - overview

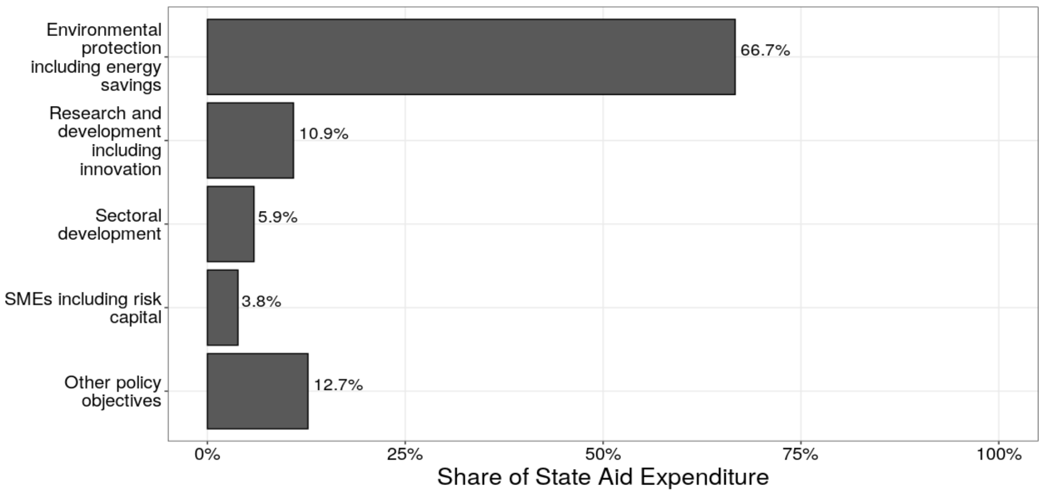
Between 2010 and 2019 Finland spent **EUR 15.2 billion** for non-agricultural State aid, of which around **EUR 5.5 billion** under notified measures and around **EUR 9.7 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Finland absorbed 77.3% of the total spending (around EUR 1.87 billion).

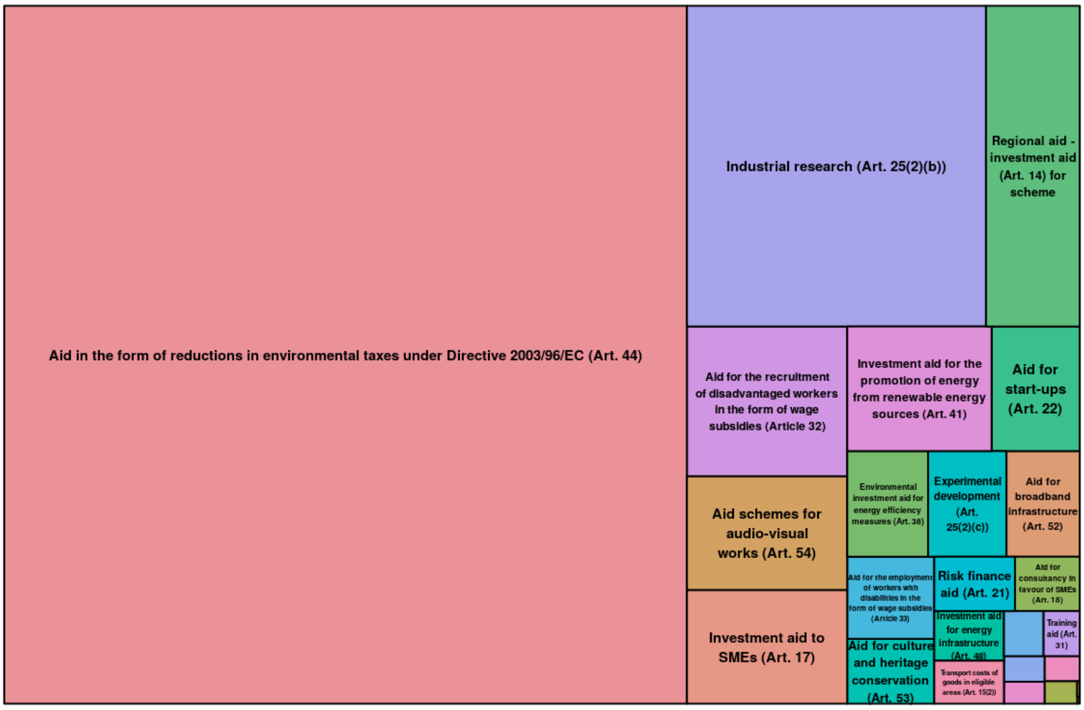
Finally, the amount of co-financed in Finland corresponded to **EUR 361 million** (around **19.3%** of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (51.09%), Employment (16.53%)** and **Regional development (16.48%).**

3. State aid Spending – Top objectives & instruments



Around 77.6% of State aid spending in Finland was concentrated in two main policy objectives. Around **66.7%** was directed towards **“Environmental protection including energy savings”** while **10.9%** to **“Research and development including innovation”.**

Finland devoted around 5.9% towards “Sectoral development” and 3.8% to “SMEs including risk capital”.



The top 4 key articles absorbed about 83.5% of the total GBER spending. The most widely used is **“Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)”, (63.5%),** followed by **“Industrial research (Art. 25(2)(b))”, (12.8%), “Regional aid - investment aid (Art. 14) for scheme”, (4%), “Aid for the recruitment of disadvantaged workers in the form of wage subsidies (Article 32)”, (3.2%).**

In terms of State aid instruments, Finland privileged the use of **“Tax advantage or tax exemption”** (around EUR 915 million, **49%** of total State aid spending), followed by **“Direct grant/ Interest rate subsidy”** (EUR 513 million, **27.5%** of total State aid spending), and **“Direct grant”** (around EUR 406 million, **21.8%** of total State aid spending).

10. Member State focus 2019 - France

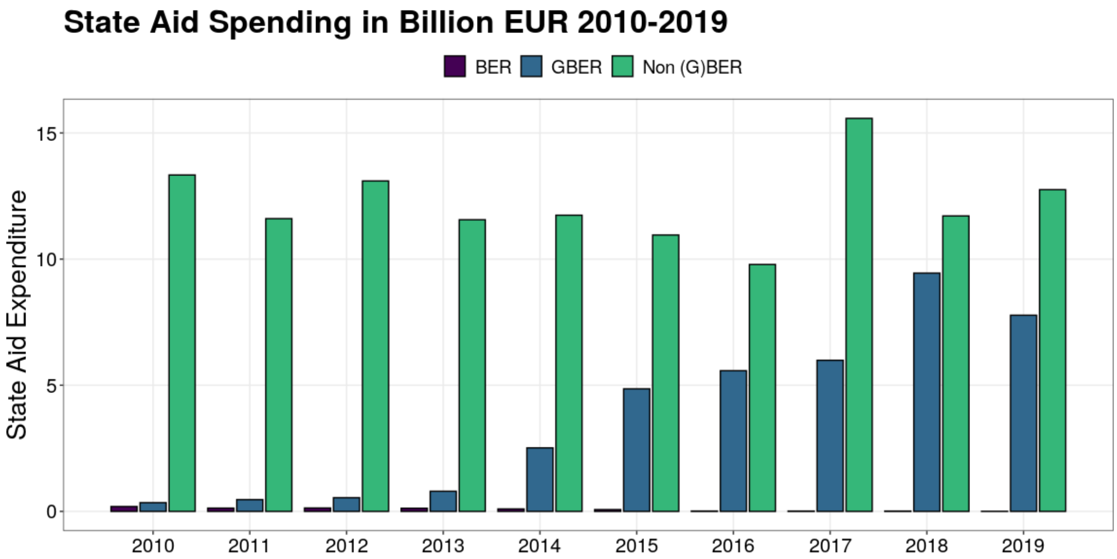
1. Case and procedural information

The total number of active measures corresponded to **176 in 2019** of which 95 GBER (X), **80 notified (N)** and 1 BER.

In 2019, the share of GBER measures in France reached 54% of the total, with **52.6%** of all newly implemented measures falling under **Non (G)BER**.

2. State aid spending - overview

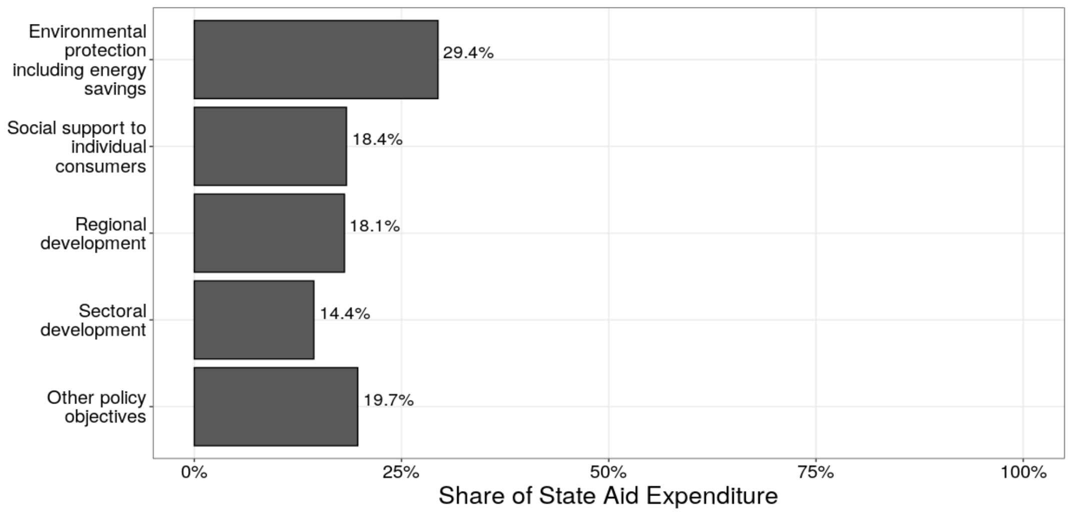
Between 2010 and 2019 France spent **EUR 161.2 billion** for non-agricultural State aid, of which around **EUR 122.1 billion** under notified measures and around **EUR 39.1 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in France absorbed 54% of the total spending (around EUR 20.53 billion).

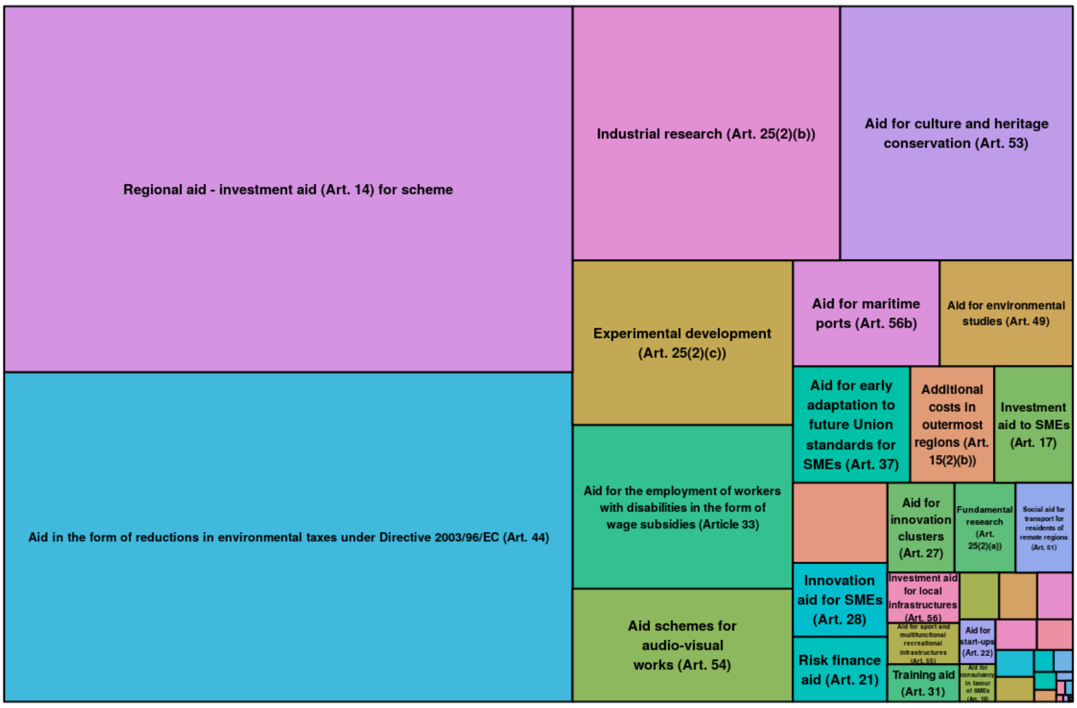
Finally, the amount of co-financed in France corresponded to **EUR 2621 million** (around **12.8%** of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (35.34%), Culture (23.75%)** and **Employment (14.93%).**

3. State aid Spending – Top objectives & instruments



Around 47.8% of State aid spending in France was concentrated in two main policy objectives. Around **29.4%** was directed towards **"Environmental protection including energy savings"** while **18.4%** to **"Social support to individual consumers".**

France devoted around 18.1% towards "Regional development" and 14.4% to "Sectoral development".



The top 4 key articles absorbed about 70.3% of the total GBER spending. The most widely used is **"Regional aid - investment aid (Art. 14) for scheme", (28%),** followed by **"Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)", (25.2%), "Industrial research (Art. 25(2)(b))", (9.1%), "Aid for culture and heritage conservation (Art. 53)", (8%).**

In terms of **State aid instruments**, France privileged the use of **"Direct grant"** (around EUR 6877 million, **33.5%** of total State aid spending), followed by **"Tax advantage or tax exemption"** (EUR 4775 million, **23.3%** of total State aid spending), and **"Direct grant/ Interest rate subsidy"** (around EUR 3084 million, **15%** of total State aid spending).

11.Member State focus 2019 - Germany

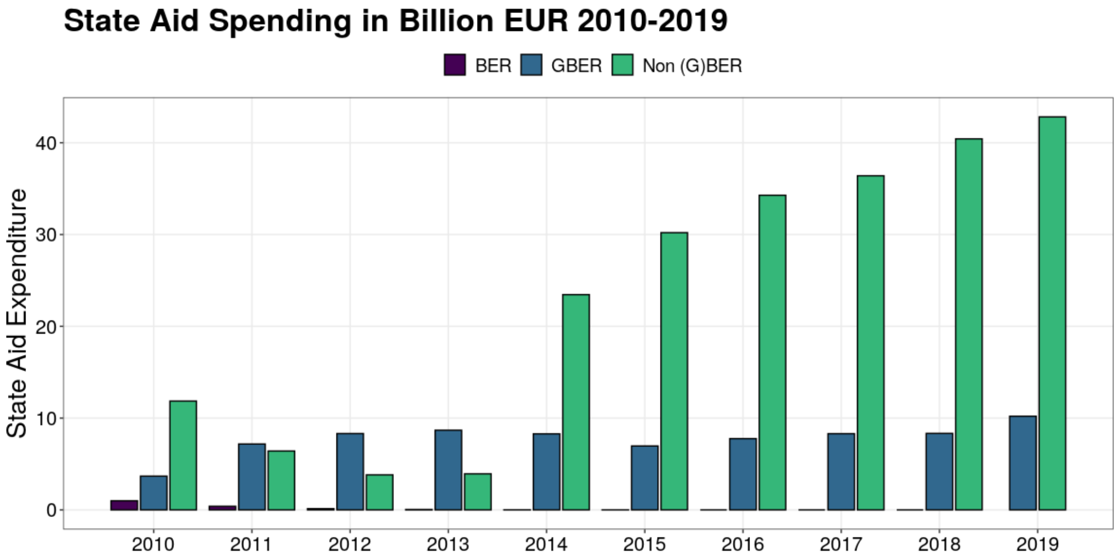
1. Case and procedural information

The total number of active measures corresponded to **729 in 2019** of which 654 GBER (X) and **75 notified (N).**

In 2019, the share of GBER measures in Germany reached 89.7% of the total, with **98.8%** of all newly implemented measures falling under **GBER.**

2. State aid spending - overview

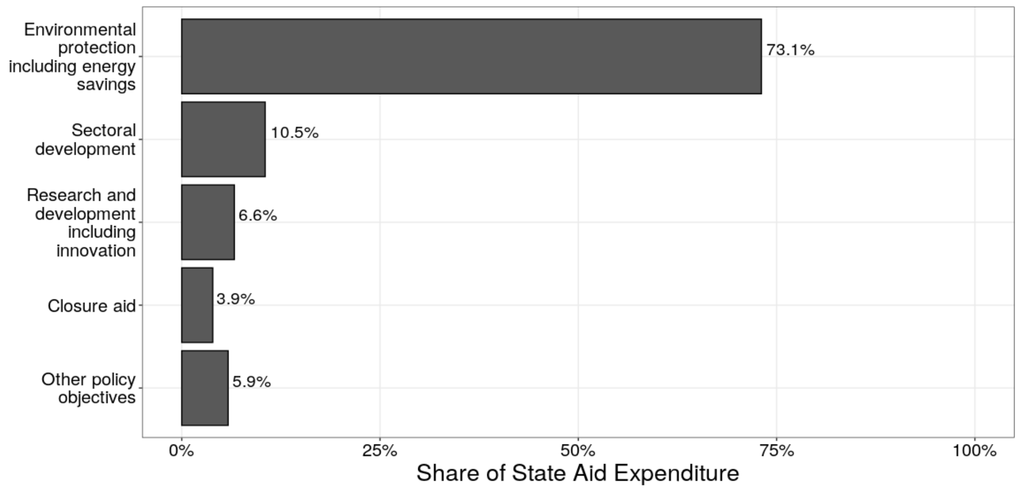
Between 2010 and 2019 Germany spent **EUR 312.9 billion** for non-agricultural State aid, of which around **EUR 233.6 billion** under notified measures and around **EUR 79.3 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Germany absorbed **77%** of the total spending (around **EUR 53.02 billion**).

Finally, the amount of co-financed in Germany corresponded to **EUR 753 million** (around **1.4%** of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (45.05%), SMEs including risk capital (27.47%)** and **Environmental protection including energy savings (8.21%).**

3. State aid Spending – Top objectives & instruments



Around 83.6% of State aid spending in Germany was concentrated in two main policy objectives. Around **73.1%** was directed towards **“Environmental protection energy savings”** including while **10.5%** to **“Sectoral development”.**

Germany devoted around 6.6% towards “Research and development including innovation” and 3.9% to “Closure aid”.

The top 4 key articles absorbed about 81.5% of the total GBER spending. The most widely used is **“Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)”, (44.7%),** followed by **“Experimental development (Art. 25(2)(c))”, (24%), “Industrial research (Art. 25(2)(b))”, (7.6%), “Investment aid to SMEs (Art. 17)”, (5.2%).**

In terms of **State aid instruments**, Germany privileged the use of **“Direct grant/ Interest rate subsidy”** (around EUR 28074 million, **53%** of total State aid spending), followed by **“Direct grant”** (EUR 9752 million, **18.4%** of total State aid spending), and **“Tax rate reduction”** (around EUR 9212 million, **17.4%** of total State aid spending).

12.Member State focus 2019 - Greece

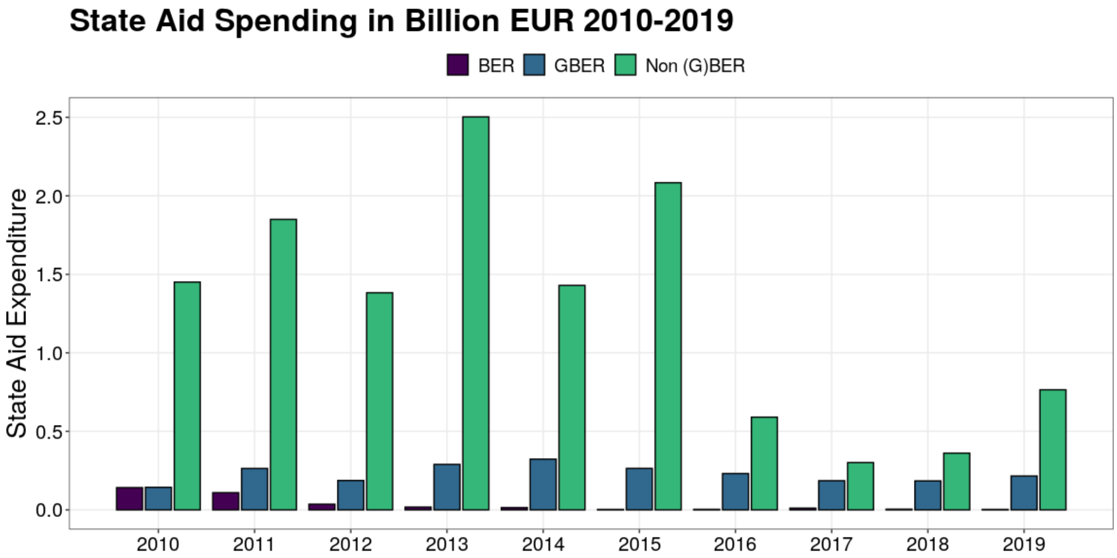
1. Case and procedural information

The total number of active measures corresponded to **82 in 2019** of which 59 GBER (X), **21 notified (N)** and **2 BER**.

In 2019, the share of GBER measures in Greece reached 72% of the total, with **75%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

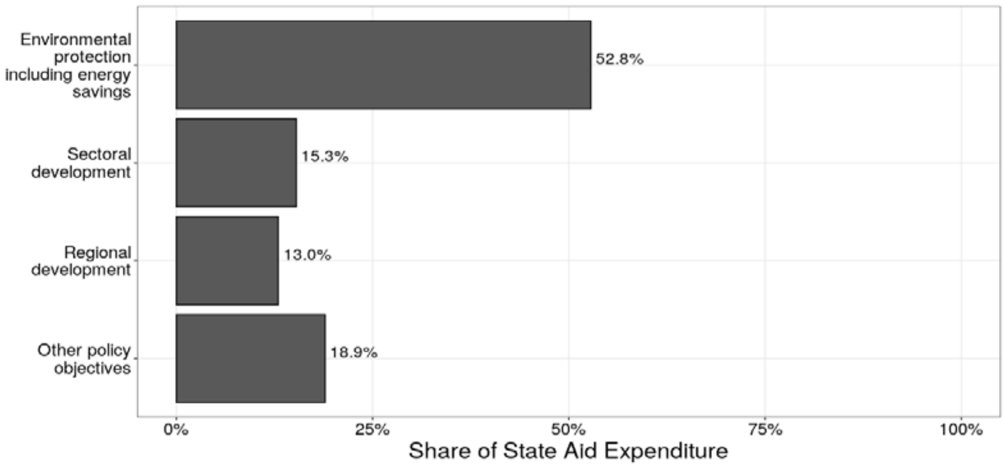
Between 2010 and 2019 Greece spent **EUR 15.4 billion** for non-agricultural State aid, of which around **EUR 12.7** billion under notified measures and around **EUR 2.7 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Greece absorbed **65.8%** of the total spending (around EUR 0.98 billion).

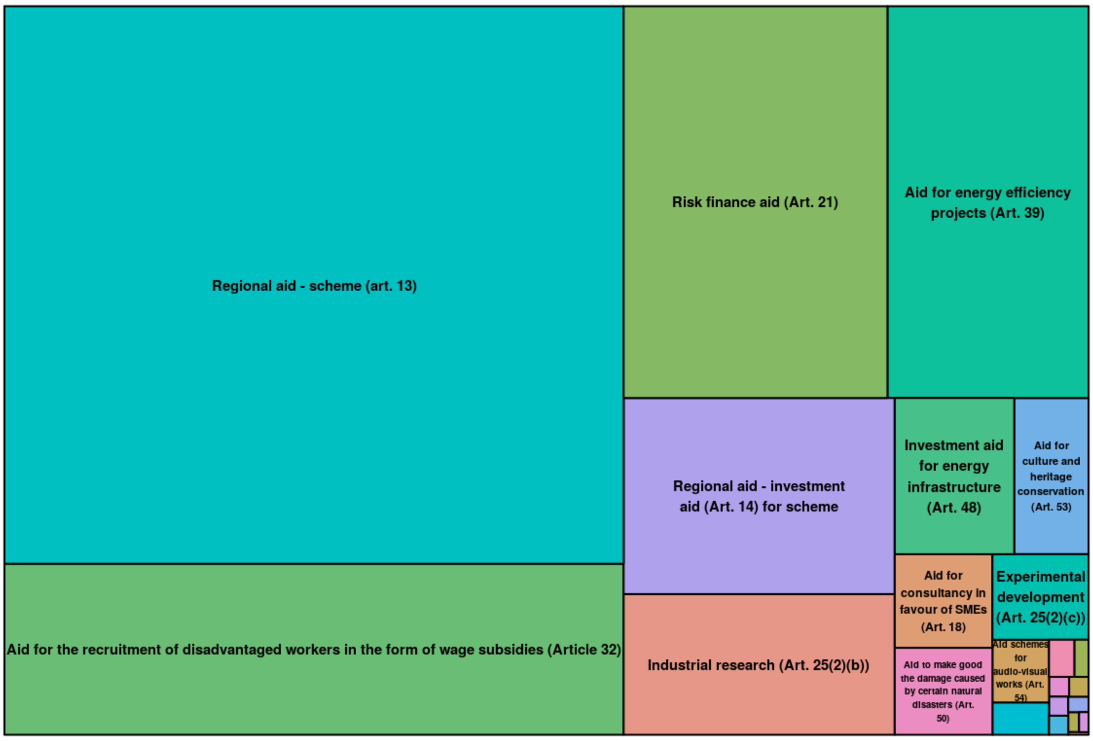
Finally, the amount of co-financed in Greece corresponded **to EUR 201 million** (around **20.5%** of the total non-agricultural spending) and was mostly concentrated in **Regional development (32.79%), Sectoral development (28.47%)** and **SMEs including risk capital (15.43%).**

3. State aid Spending – Top objectives & instruments



Around 68.1% of State aid spending in Greece was concentrated in two main policy objectives. Around **52.8%** was directed towards **"Environmental protection including energy savings"** while **15.3%** to **"Sectoral development".**

Greece devoted around 13% towards "Regional development" and 18.9% to "Other policy objectives".



The top 4 key articles absorbed about 80.2% of the total GBER spending. The most widely used is **"Regional aid - scheme (art. 13)", (43.7%),** followed by **"Aid for the recruitment of disadvantaged workers in the form of wage subsidies (Article 32)", (13.4%), "Risk finance aid (Art. 21)", (13.1%), "Aid for energy efficiency projects (Art. 39)", (10%).**

In terms of State aid instruments, Greece privileged the use of **"Direct grant"** (around EUR 415 million, **42.2%** of total State aid spending), followed by **"Other"** (EUR 327 million, **33.3%** of total State aid spending), and **"Subsidised services"** (around EUR 119 million, **12.1%** of total State aid spending).

13.Member State focus 2019 - Hungary

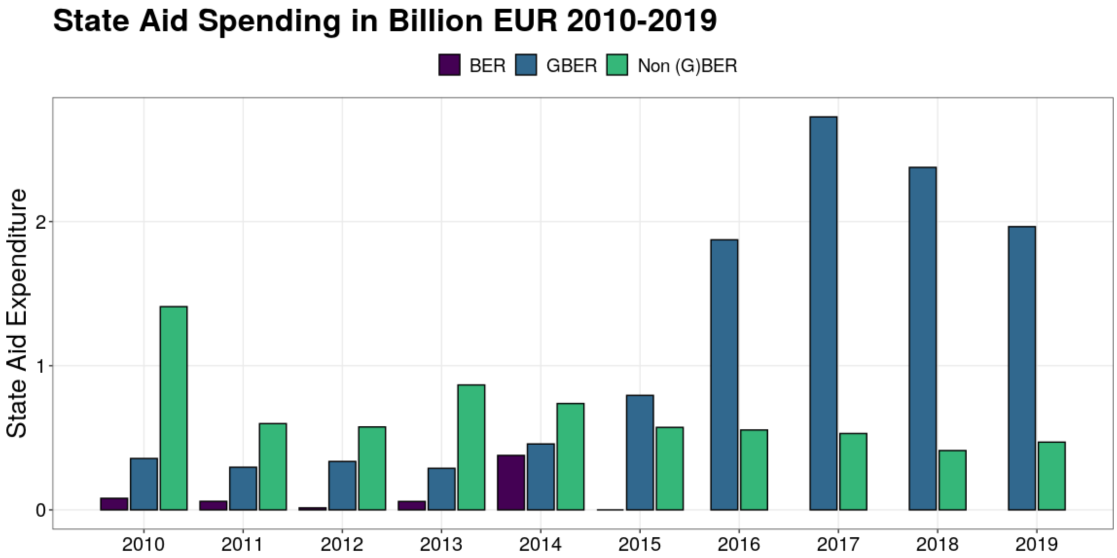
1. Case and procedural information

The total number of active measures corresponded to **131 in 2019** of which 126 GBER (X) and **5 notified (N).**

In 2019, the share of GBER measures in Hungary reached 96.2% of the total, with **100%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

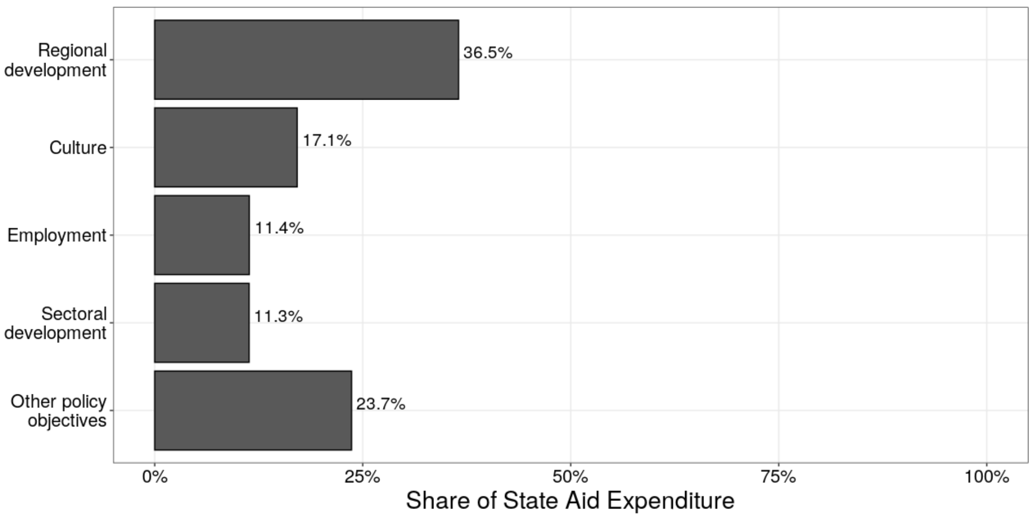
Between 2010 and 2019 Hungary spent **EUR 18.8 billion** for non-agricultural State aid, of which around **EUR 6.7 billion** under notified measures and around **EUR 12.1 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Hungary absorbed **59.4%** of the total spending (around EUR 2.43 billion).

Finally, the amount of co-financed in Hungary corresponded to **EUR 313 million** (around 12.9% of the total non-agricultural spending) and was mostly concentrated in **Regional development (47.71%), Research and development including innovation (29.4%)** and **Environmental protection including energy savings (7.48%).**

3. State aid Spending – Top objectives & instruments



Around 53.6% of State aid spending in Hungary was concentrated in two main policy objectives. Around **36.5%** was directed towards **"Regional development"** while **17.1%** to **"Culture".**

Hungary devoted around 11.4% towards "Employment" and 11.3% to "Sectoral development".

The top 4 key articles absorbed about 73.8% of the total GBER spending. The most widely used is **"Regional aid - investment aid (Art. 14) for scheme", (39.1%),** followed by **"Aid for culture and heritage conservation (Art. 53)", (13%), "Aid for the employment of workers with disabilities in the form of wage subsidies (Article 33)", (11.3%), "Experimental development (Art. 25(2)(c))", (10.4%).**

In terms of **State aid instruments**, Hungary privileged the use of **"Direct grant/ Interest rate subsidy"** (around EUR 1912 million, **78.5%** of total State aid spending), followed by **"Other forms of equity intervention"** (EUR 232 million, **9.5%** of total State aid spending), and **"Direct grant"** (around EUR 221 million, **9.1%** of total State aid spending).

14.Member State focus 2019 - Ireland

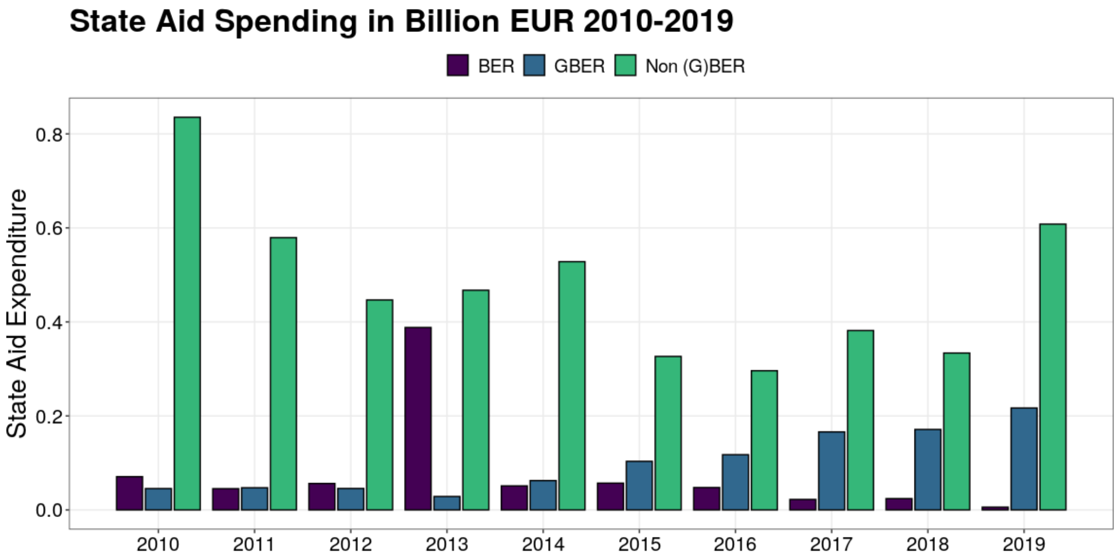
1. Case and procedural information

The total number of active measures corresponded to **28 in 2019** of which 17 GBER (X), **10 notified (N)** and **1 BER**.

In 2019, the share of GBER measures in Ireland reached 60.7% of the total, with **100%** of all newly implemented measures falling under **GBER.**

2. State aid spending - overview

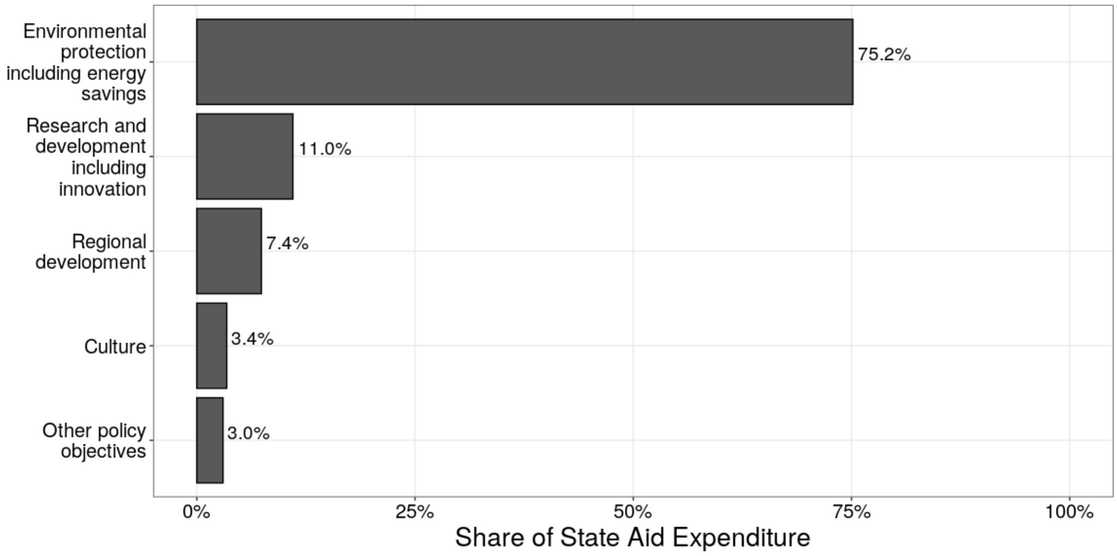
Between 2010 and 2019 Ireland spent **EUR 6.6 billion** for non-agricultural State aid, of which around **EUR 4.8 billion** under notified measures and around **EUR 1.8 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Ireland absorbed **81.3%** of the total spending (around EUR 0.83 billion).

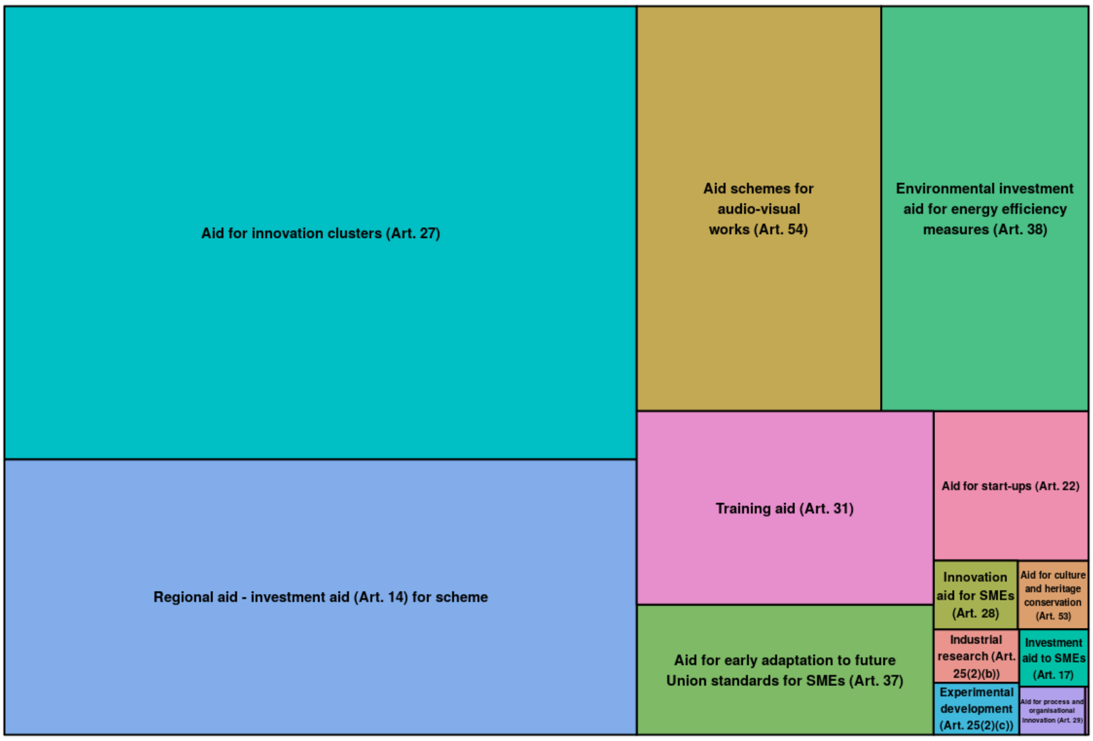
No co-financed aid was registered in Ireland for 2019.

3. State aid Spending – Top objectives & instruments



Around 86.2% of State aid spending in Ireland was concentrated in two main policy objectives. Around **75.2%** was directed towards **“Environmental protection including energy savings”** while **11%** to **“Research and development including innovation”.**

Ireland devoted around 7.4% towards “Regional development” and 3.4% to “Culture”.



The top 4 key articles absorbed about 81.5% of the total GBER spending. The most widely used is **“Aid for innovation clusters (Art. 27)”, (36.3%),** followed by **“Regional aid - investment aid (Art. 14) for scheme”, (22.1%), “Aid schemes for audio-visual works (Art. 54)”, (12.5%), “Environmental investment aid for energy efficiency measures (Art. 38)”, (10.6%).**

In terms of State aid instruments, Ireland privileged the use of **“Direct grant”** (around EUR 572 million, **68.9%** of total State aid spending), followed by **“Direct grant/ Interest rate subsidy”** (EUR 201 million, **24.2%** of total State aid spending), and **“Other forms of tax advantage”** (around EUR 43 million, **5.1%** of total State aid spending).

15.Member State focus 2019 - Italy

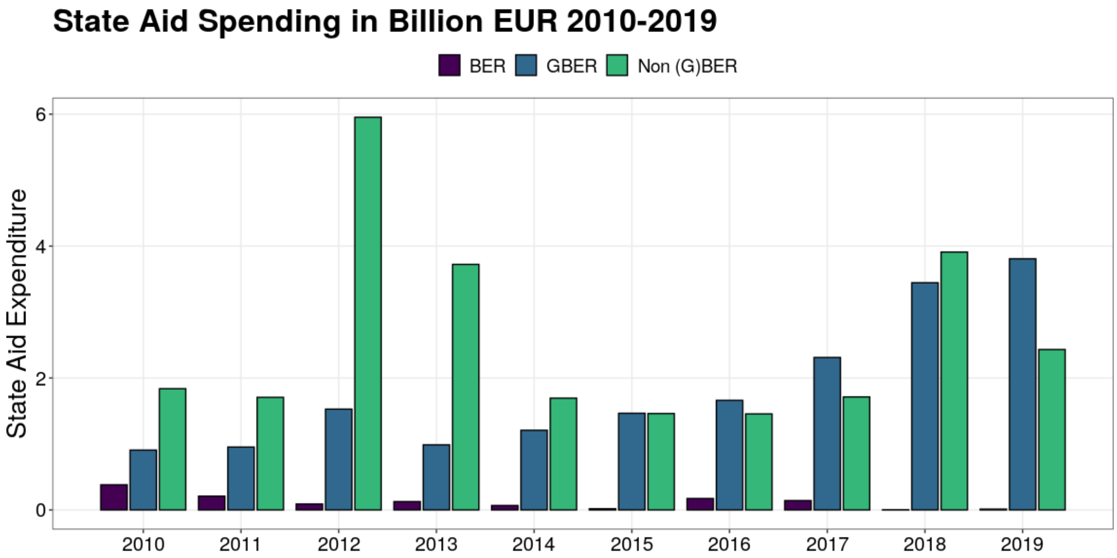
1. Case and procedural information

The total number of active measures corresponded to **618 in 2019** of which 558 GBER (X), **53 notified (N)** and **7 BER.**

In 2019, the share of GBER measures in Italy reached 90.3% of the total, with **97.8%** of all newly implemented measures falling under **GBER.**

2. State aid spending - overview

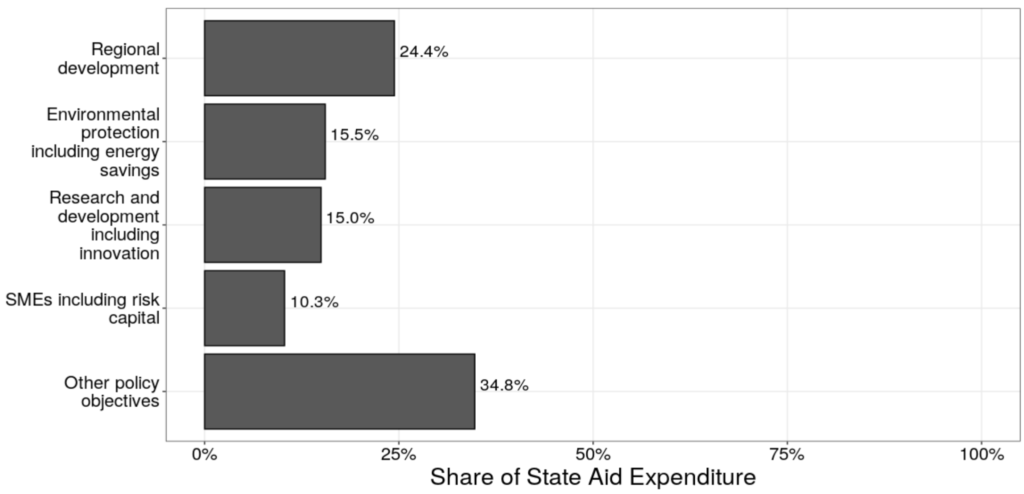
Between 2010 and 2019 Italy spent **EUR 45.4 billion** for non-agricultural State aid, of which around **EUR 25.9 billion** under notified measures and around **EUR 19.5 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Italy absorbed **43.1%** of the total spending (around EUR 6.25 billion).

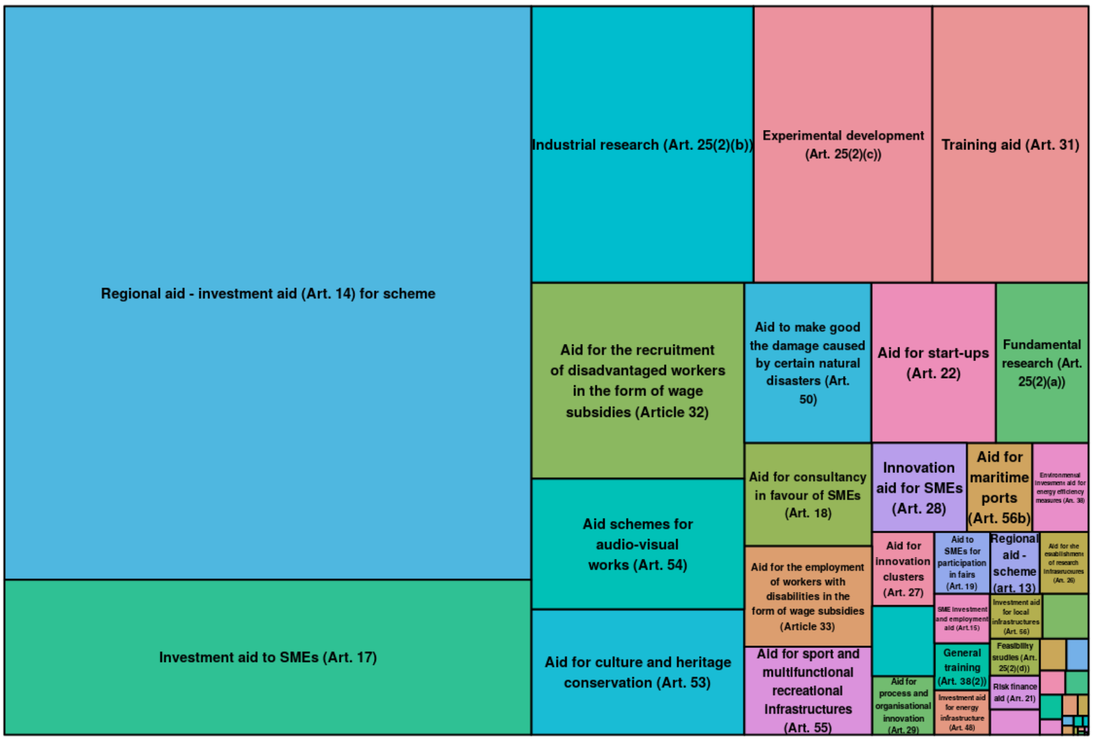
Finally, the amount of co-financed in Italy corresponded to **EUR 2765 million** (around **44.2%** of the total non-agricultural spending) and was mostly concentrated in **Regional development (52.18%), Research and development including innovation (21.67%)** and **Other (8.65%).**

3. State aid Spending – Top objectives & instruments



Around 39.9% of State aid spending in Italy was concentrated in two main policy objectives. Around **24.4%** was directed towards **"Regional development"** while **15.5%** to **"Environmental protection including energy savings".**

Italy devoted around 15% towards "Research and development including innovation" and 10.3% to "SMEs including risk capital".



The top 4 key articles absorbed about 62.7% of the total GBER spending. The most widely used is **"Regional aid - investment aid (Art. 14) for scheme", (38.3%),** followed by **"Investment aid to SMEs (Art. 17)", (10.3%), "Industrial research (Art. 25(2)(b))", (7.8%), "Experimental development (Art. 25(2)(c))", (6.3%).**

In terms of **State aid instruments**, Italy privileged the use of **"Direct grant/ Interest rate subsidy"** (around EUR 1787 million, **28.6%** of total State aid spending), followed by **"Tax advantage or tax exemption"** (EUR 1309 million, **20.9%** of total State aid spending), and **"Direct grant"** (around EUR 1039 million, **16.6%** of total State aid spending).

16.Member State focus 2019 - Latvia

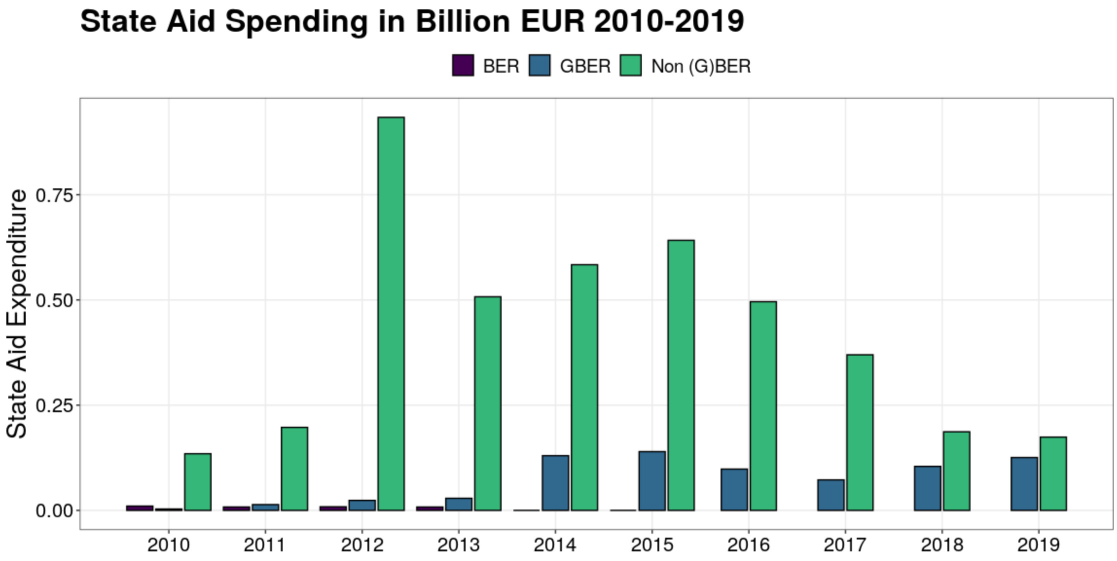
1. Case and procedural information

The total number of active measures corresponded to **42 in 2019** of which 32 GBER (X) and **10 notified (N).**

In 2019, the share of **GBER** measures in Latvia reached **76.2%** of the total.

2. State aid spending - overview

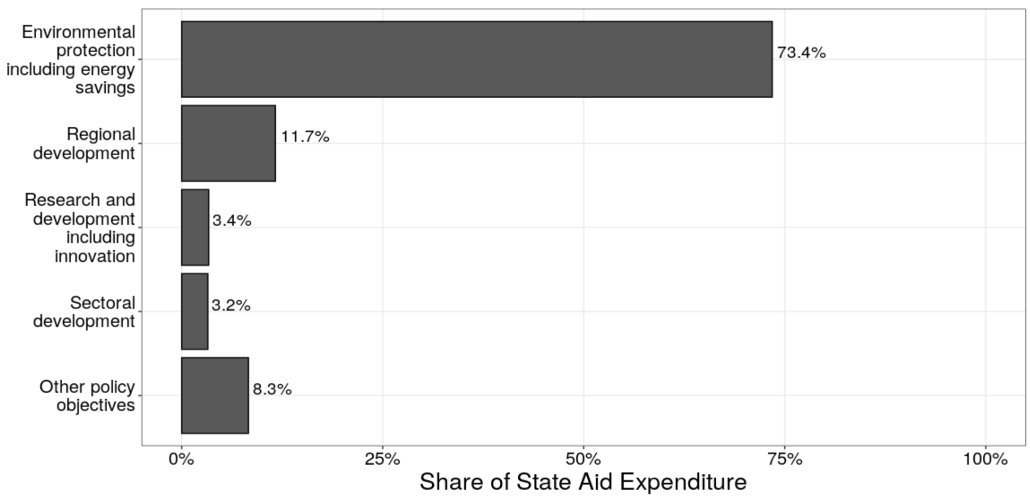
Between 2010 and 2019 Latvia spent **EUR 5 billion** for non-agricultural State aid, of which around EUR **4.2 billion** under notified measures and around **EUR 0.8 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Latvia absorbed **75.7%** of the total spending (around EUR 0.3 billion).

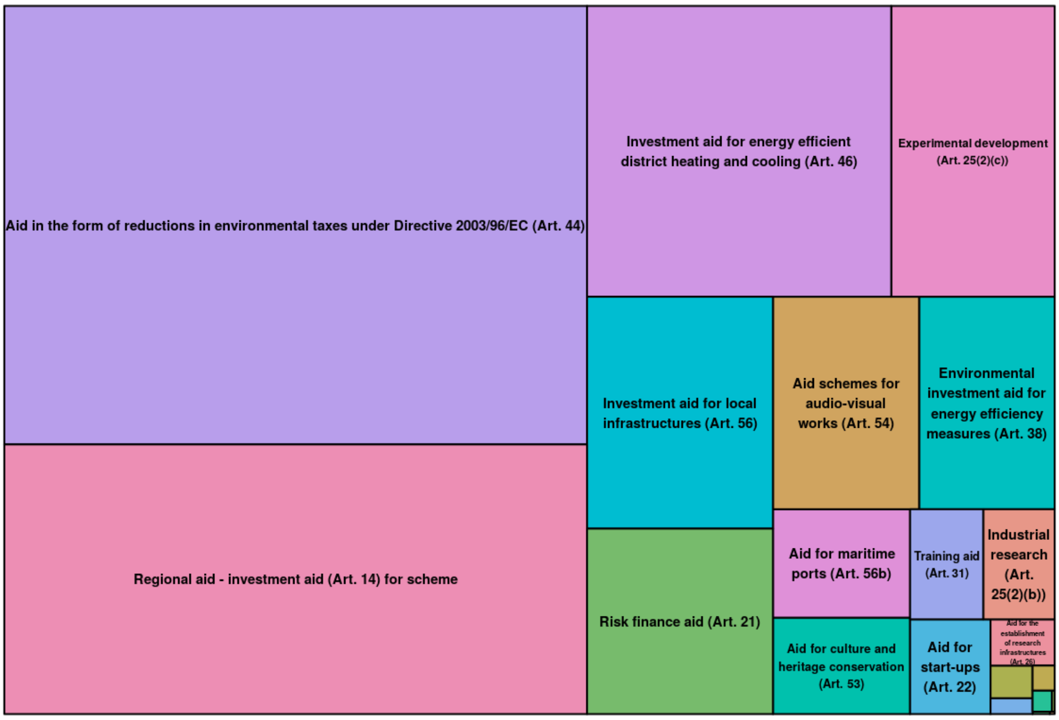
Finally, the amount of co-financed in Latvia corresponded to **EUR 89 million** (around **29.7%** of the total non-agricultural spending) and was mostly concentrated in **Regional development (36.62%), Environmental protection including energy savings (22.4%)** and **Research and development including innovation (11.31%).**

3. State aid Spending – Top objectives & instruments



Around 85.1% of State aid spending in Latvia was concentrated in two main policy objectives. Around **73.4%** was directed towards **“Environmental protection including energy savings”** while **11.7%** to **“Regional development”.**

Latvia devoted around 3.4% towards “Research and development including innovation” and 3.2% to “Sectoral development”.



The top 4 key articles absorbed about 73.7% of the total GBER spending. The most widely used is **“Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)”, (34.3%),** followed by **“Regional aid - investment aid (Art. 14) for scheme”, (21.1%), “Investment aid for energy efficient district heating and cooling (Art. 46)”, (11.9%), “Experimental development (Art. 25(2)(c))”, (6.4%).**

In terms of **State aid instruments**, Latvia privileged the use of **“Direct grant” (around EUR 158 million, 52.8% of total State aid spending),** followed by **“Direct grant/ Interest rate subsidy” (EUR 71 million, 23.7% of total State aid spending), and “Tax advantage or tax exemption” (around EUR 52 million, 17.2% of total State aid spending).**

17. Member State focus 2019 - Lithuania

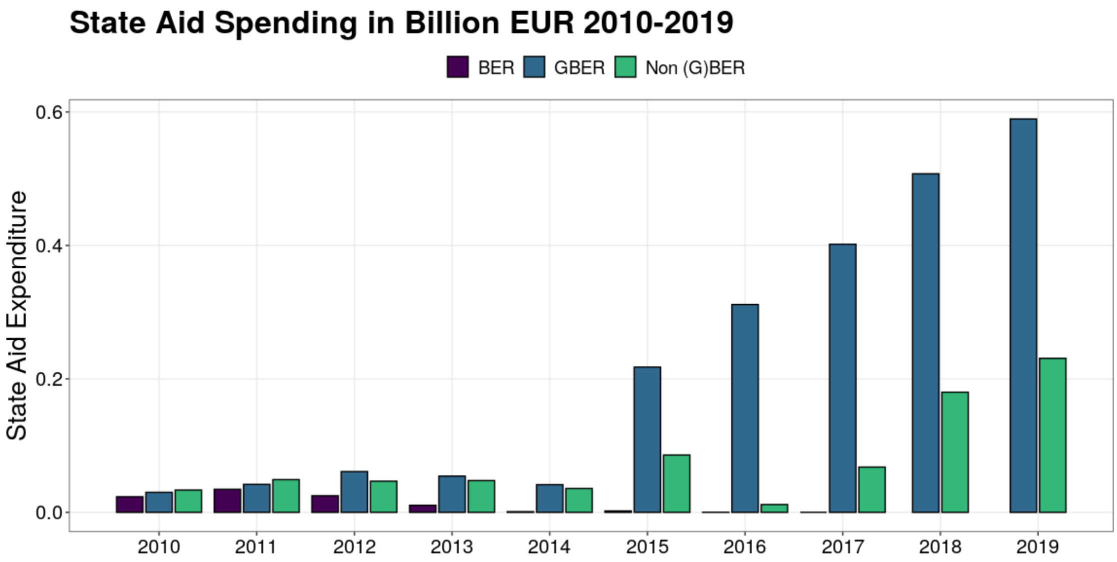
1. Case and procedural information

The total number of active measures corresponded to **86 in 2019** of which 76 GBER (X) and **10 notified (N).**

In 2019, the share of GBER measures in Lithuania reached 88.4% of the total, with **100%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

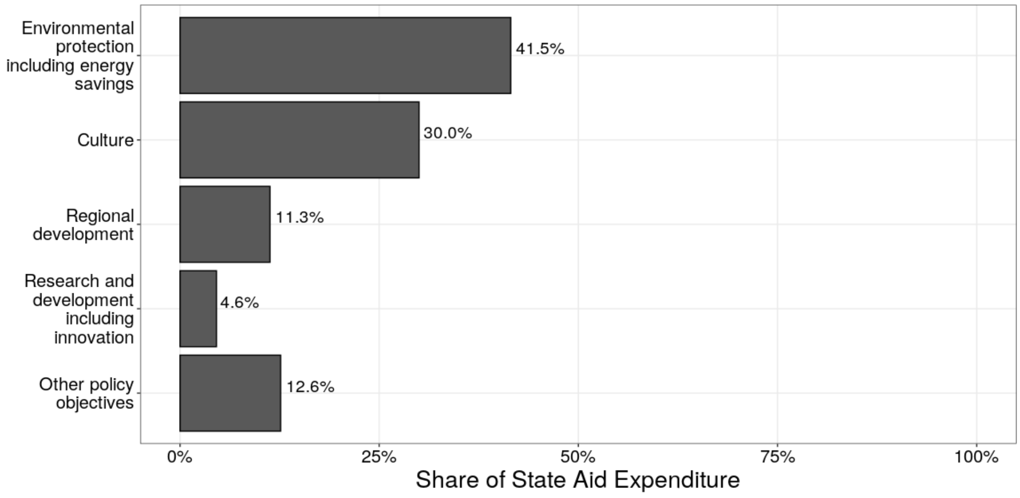
Between 2010 and 2019 Lithuania spent **EUR 3.1 billion** for non-agricultural State aid, of which around **EUR 0.8 billion** under notified measures and around **EUR 2.3 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Lithuania absorbed **62.6%** of the total spending (around EUR 0.82 billion).

Finally, the amount of co-financed in Lithuania corresponded to **EUR 247 million** (around **30.1%** of the total non-agricultural spending) and was mostly concentrated in **Environmental protection including energy savings (27.91%), Regional development (20.22%)** and **Research and development including innovation (15.14%).**

3. State aid Spending – Top objectives & instruments



Around 71.5% of State aid spending in Lithuania was concentrated in two main policy objectives. Around **41.5%** was directed towards **"Environmental protection including energy savings"** while **30%** to **"Culture".**

Lithuania devoted around 11.3% towards "Regional development" and 4.6% to "Research and development including innovation".

The top 4 key articles absorbed about 68.8% of the total GBER spending. The most widely used is **"Aid for culture and heritage conservation (Art. 53)", (37.7%),** followed by **"Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)", (14.6%), "Regional aid - investment aid (Art. 14) for scheme", (10%), "Investment aid for energy efficient district heating and cooling (Art. 46)", (6.5%).**

In terms of **State aid instruments**, Lithuania privileged the use of **"Direct grant/ Interest rate subsidy"** (around EUR 266 million, **32.5%** of total State aid spending), followed by **"Direct grant"** (EUR 222 million, **27.1%** of total State aid spending), and **"Other"** (around EUR 196 million, **23.9%** of total State aid spending).

18. Member State focus 2019 - Luxembourg

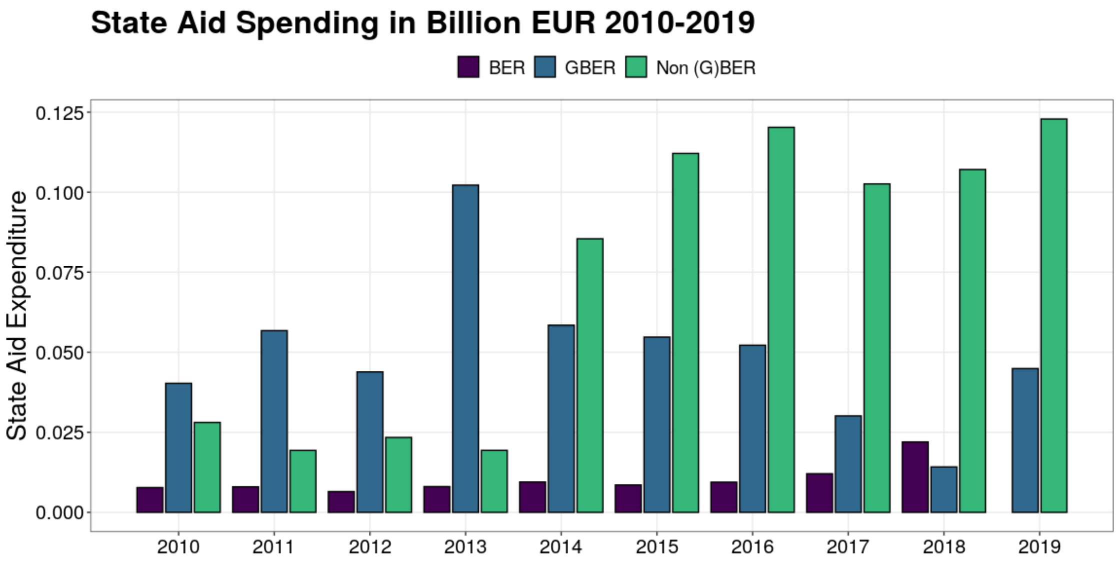
1. Case and procedural information

The total number of active measures corresponded to **10 in 2019** of which 4 GBER (X) and **6 notified (N).**

In 2019, the share of GBER measures in Luxembourg reached 40% of the total, with **100%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

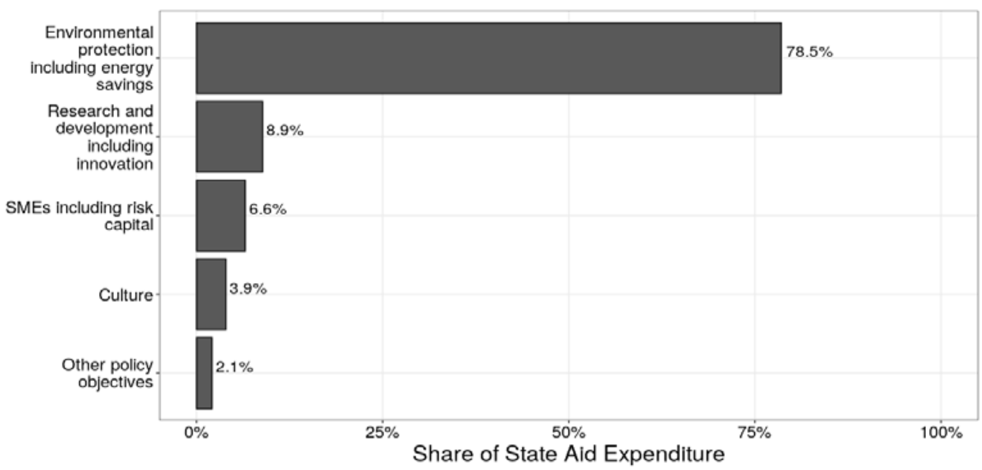
Between 2010 and 2019 Luxembourg spent **EUR 1.3 billion** for non-agricultural State aid, of which around **EUR 0.7 billion** under notified measures and around **EUR 0.6 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Luxembourg absorbed **91.4%** of the total spending (around EUR 0.17 billion).

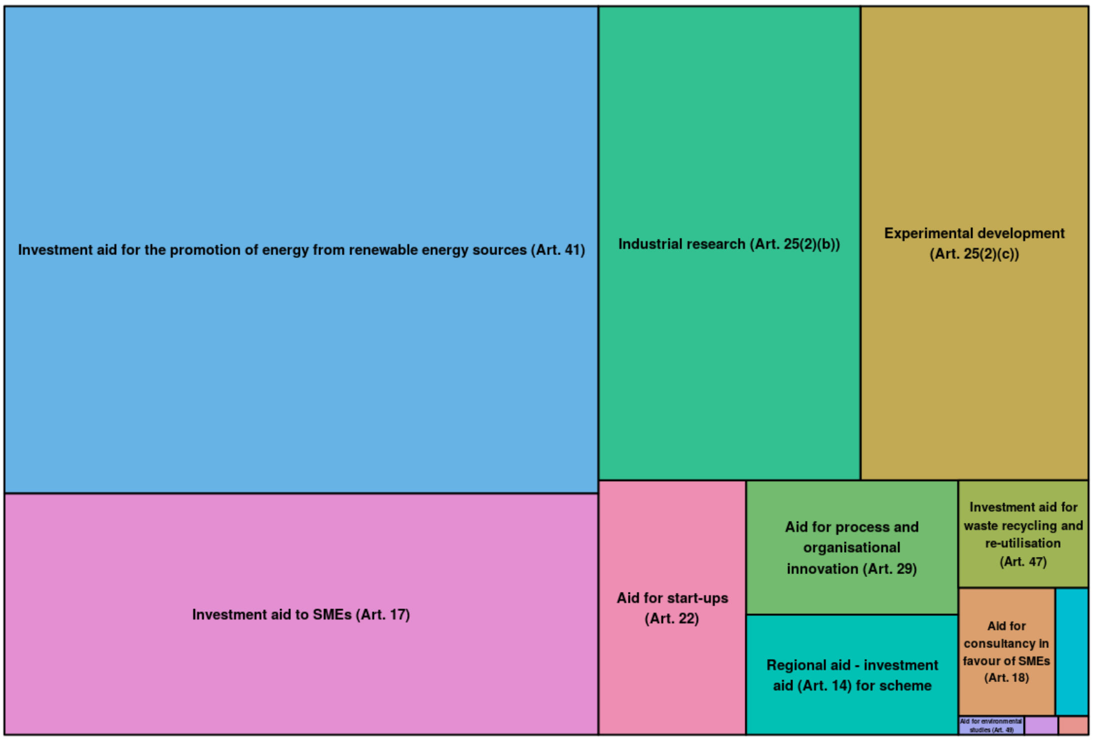
Finally, the amount of co-financed in Luxembourg corresponded to **EUR 17 million** (around 10% of the total non-agricultural spending) and was mostly concentrated **in Research and development including innovation (86.15%), SMEs including risk capital (13.85%)** and **Compensation of damages caused by natural disaster (0%).**

3. State aid Spending – Top objectives & instruments



Around 87.4% of State aid spending in Luxembourg was concentrated in two main policy objectives. Around **78.5%** was directed towards **"Environmental protection including energy savings"** while **8.9%** to **"Research and development including innovation".**

Luxembourg devoted around 6.6% towards "SMEs including risk capital" and 3.9% to "Culture".



The top 4 key articles absorbed about 84.1% of the total GBER spending. The most widely used is **"Investment aid for the promotion of energy from renewable energy sources (Art. 41)", (36.6%),** followed by **"Investment aid to SMEs (Art. 17)", (18.1%), "Industrial research (Art. 25(2)(b))", (15.7%), "Experimental development (Art. 25(2)(c))", (13.7%).**

In terms of **State aid instruments**, Luxembourg privileged the use of **"Direct grant"** (around EUR 118 million, **70.5%** of total State aid spending), followed by **"Direct grant/ Interest rate subsidy"** (EUR 45 million, **26.8**% of total State aid spending), and **"Other"** (around EUR 5 million, **2.7%** of total State aid spending).

19.Member State focus 2019 - Malta

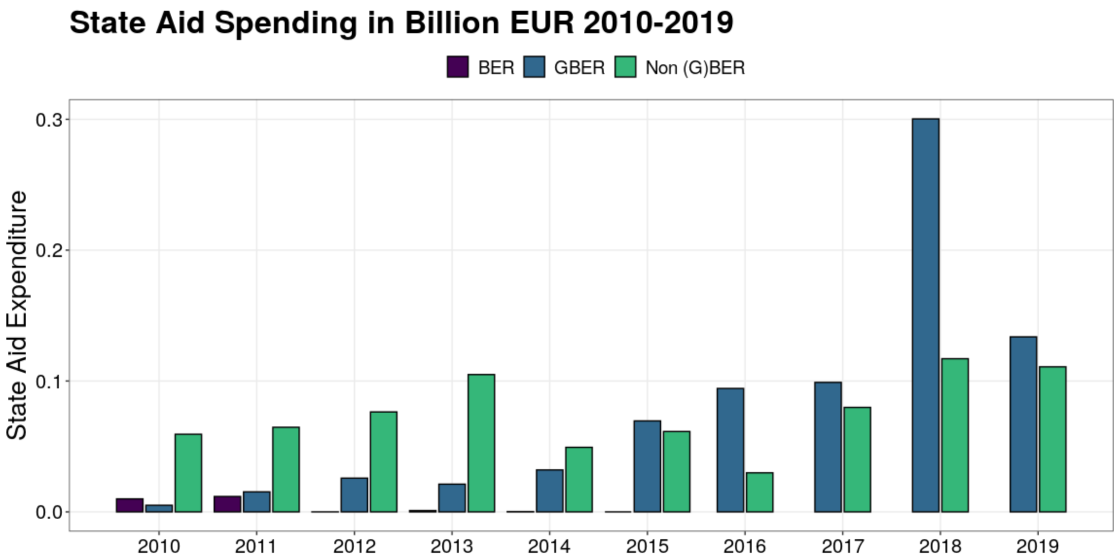
1. Case and procedural information

The total number of active measures corresponded to **26 in 2019** of which 22 GBER (X) and **4 notified (N).**

In 2019, the share of GBER measures in Malta reached 84.6% of the total, with **100%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

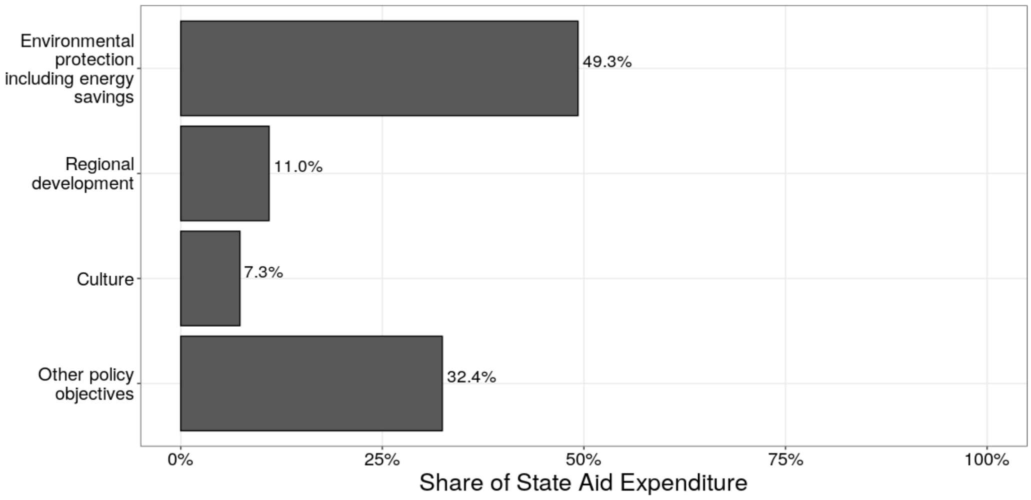
Between 2010 and 2019 Malta spent **EUR 1.6 billion** for non-agricultural State aid, of which around **EUR 0.8 billion** under notified measures and around **EUR 0.8 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Malta absorbed **92.3%** of the total spending (around EUR 0.24 billion).

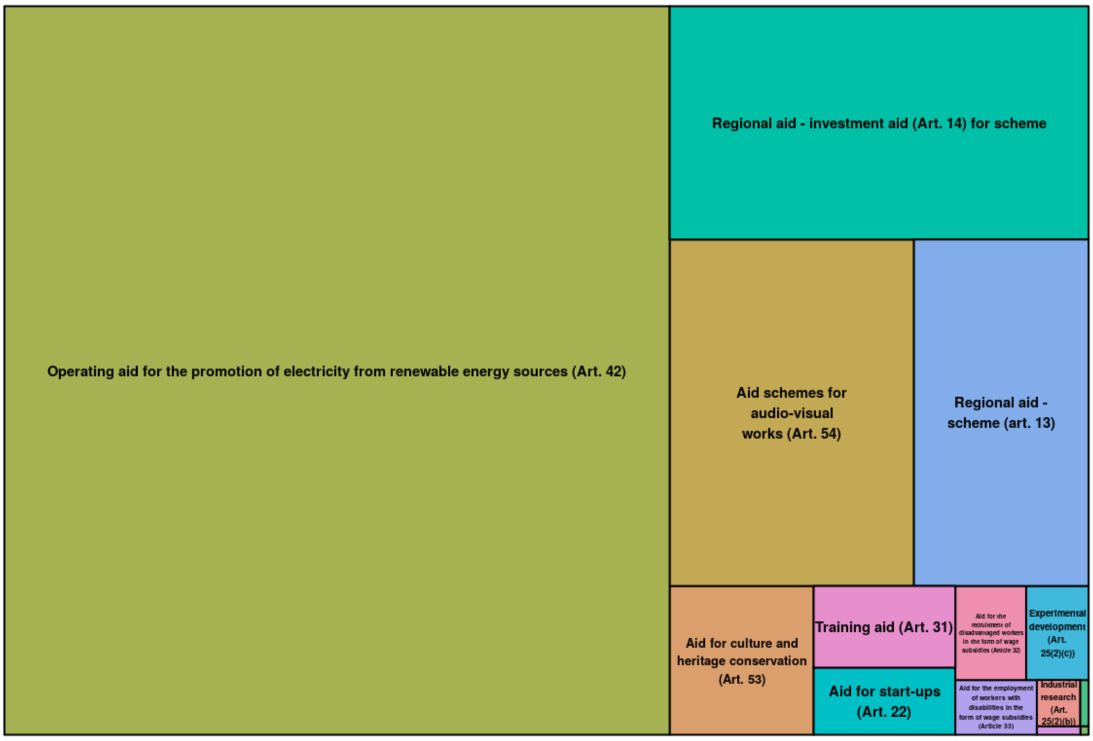
Finally, the amount of co-financed in Malta corresponded to **EUR 9 million** (around **3.8%** of the total non-agricultural spending) and was mostly concentrated in **Regional development (25.52%), Employment (22.04%)** and **Culture (17.78%).**

3. State aid Spending – Top objectives & instruments



Around **60.3%** of State aid spending in Malta was concentrated in two main policy objectives. Around **49.3%** was directed towards **"Environmental protection including energy savings"** while **11%** to **"Regional development".**

Malta devoted around 7.3% towards "Culture" and 32.4% to "Other policy objectives".



The top 4 key articles absorbed about 92.2% of the total GBER spending. The most widely used is **"Operating aid for the promotion of electricity from renewable energy sources (Art. 42)", (61.4%),** followed by **"Regional aid - investment aid (Art. 14) for scheme", (12.4%), "Aid schemes for audio-visual works (Art. 54)", (10.7%), "Regional aid - scheme (art. 13)", (7.7%).**

In terms of **State aid instruments**, Malta privileged the use of **"Other"** (around EUR 197 million, **80.7%** of total State aid spending), followed by **"Tax advantage or tax exemption"** (EUR 14 million, **5.9%** of total State aid spending), and **"Direct grant/ Interest rate subsidy"** (around EUR 13 million, **5.2%** of total State aid spending).

20.Member State focus 2019 - Netherlands

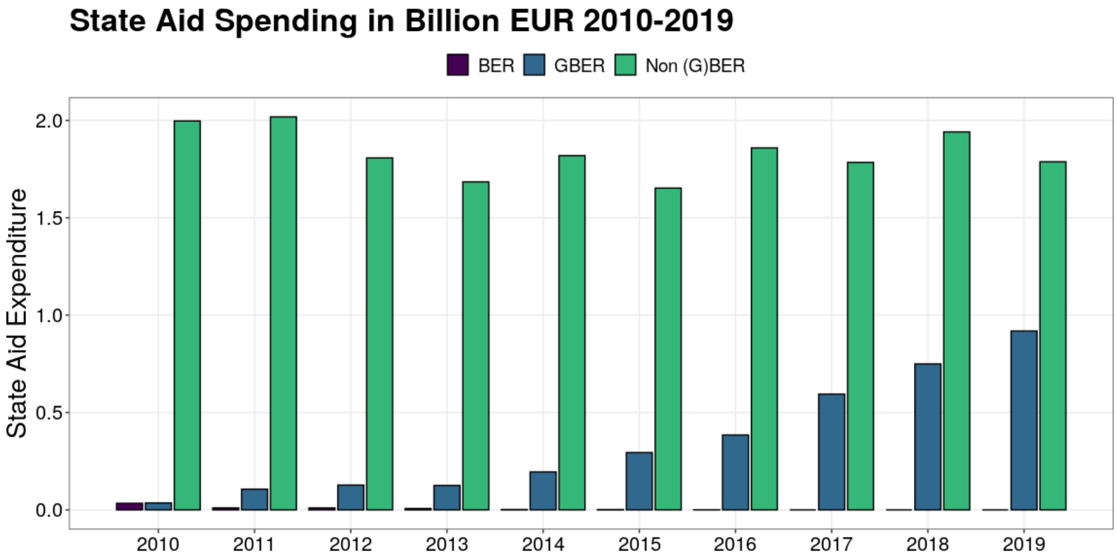
1. Case and procedural information

The total number of active measures corresponded to **589 in 2019** of which 570 GBER (X) and **19 notified (N).**

In 2019, the share of GBER measures in Netherlands reached 96.8% of the total, with **99.4%** of all newly implemented measures falling under GBER.

2. State aid spending - overview

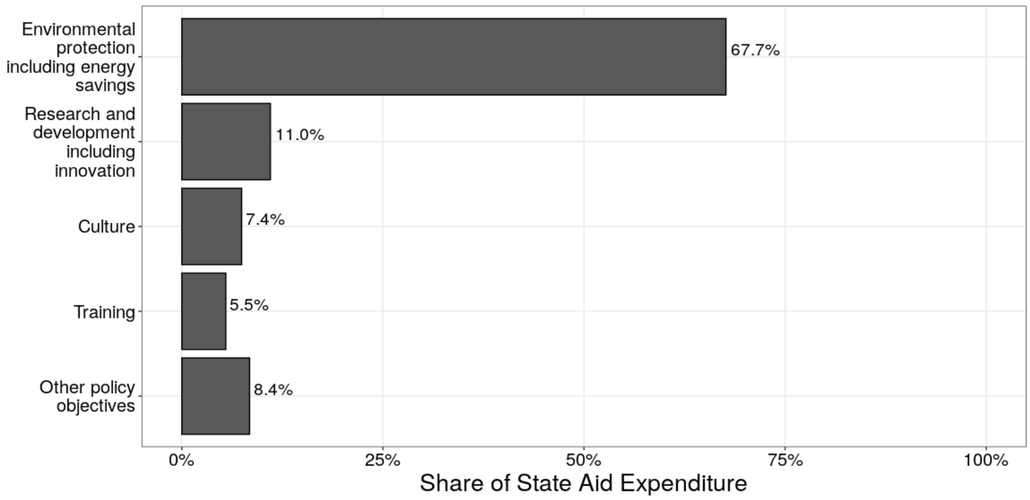
Between 2010 and 2019 Netherlands spent **EUR 21.9 billion** for non-agricultural State aid, of which around **EUR 18.3 billion** under notified measures and around **EUR 3.6 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Netherlands absorbed **60.1%** of the total spending (around EUR 2.71 billion).

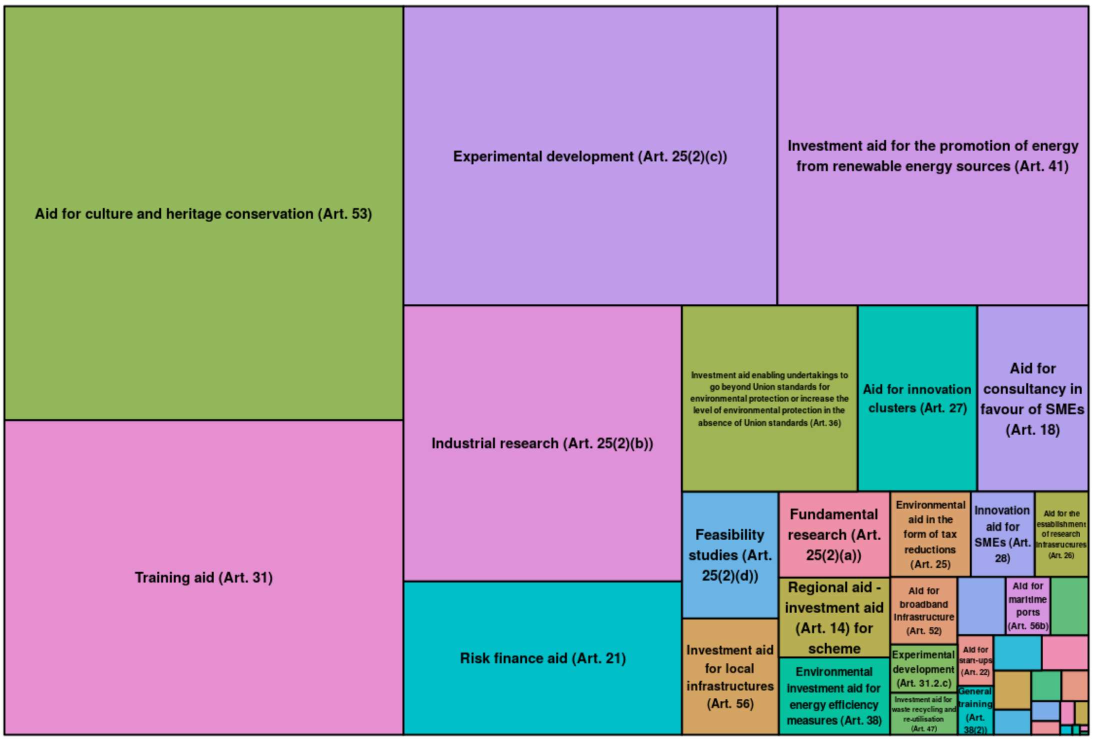
Finally, the amount of co-financed in Netherlands corresponded to **EUR 128 million** (around **4.7%** of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (79.28%), SMEs including risk capital (17.2%)** and **Environmental protection including energy savings (3.14%).**

3. State aid Spending – Top objectives & instruments



Around **78.7%** of State aid spending in Netherlands was concentrated in two main policy objectives. Around **67.7%** was directed towards **“Environmental protection including energy savings”** while **11%** to **“Research and development including innovation”.**

Netherlands devoted around 7.4% towards “Culture” and 5.5% to “Training”.



The top 4 key articles absorbed about 62.8% of the total GBER spending. The most widely used is **“Aid for culture and heritage conservation (Art. 53)”, (20.9%),** followed by **“Training aid (Art. 31)”, (15.9%), “Experimental development (Art. 25(2)(c))”, (14.2%), “Investment aid for the promotion of energy from renewable energy sources (Art. 41)”, (11.8%).**

In terms of State aid instruments, Netherlands privileged the use of **“Direct grant”** (around EUR 1662 million, **61.5%** of total State aid spending), followed by **“Direct grant/ Interest rate subsidy”** (EUR 730 million, **27%** of total State aid spending), and **“Loan/ Repayable advances”** (around EUR 144 million, **5.3%** of total State aid spending).

21. Member State focus 2019 - Poland

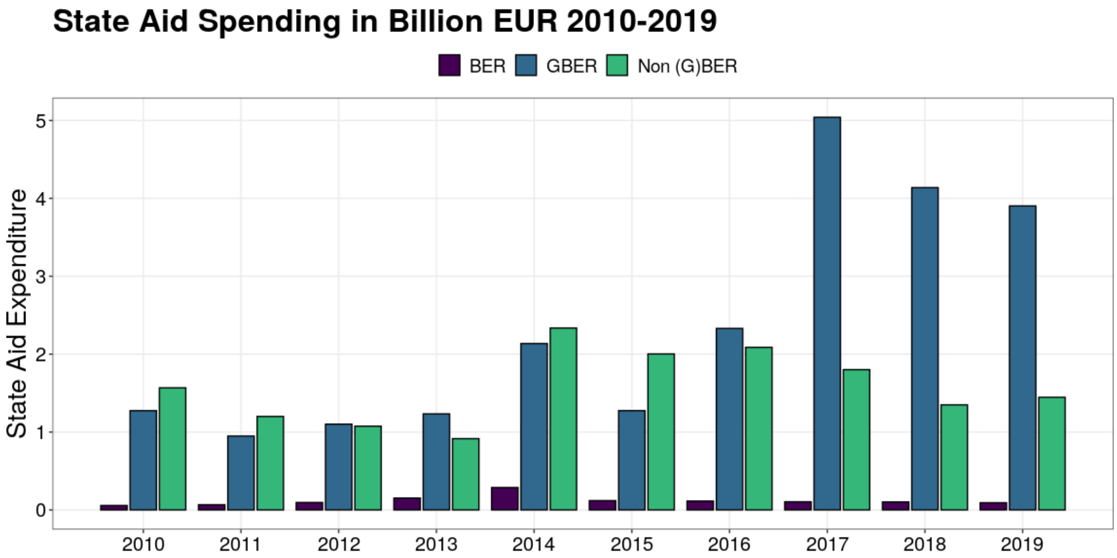
1. Case and procedural information

The total number of active measures corresponded to **153 in 2019** of which 115 GBER (X), **28 notified (N)** and **10 BER**.

In 2019, the share of GBER measures in Poland reached 75.2% of the total, with **93.8%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

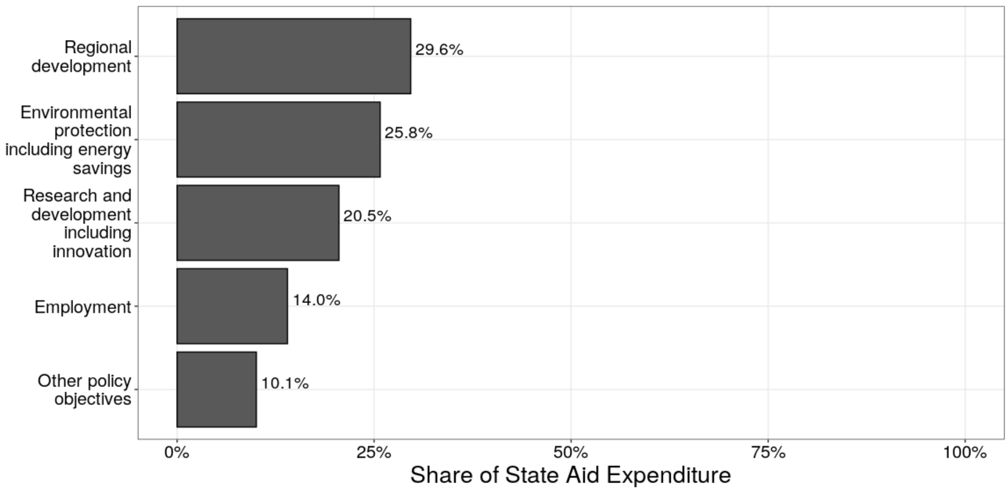
Between 2010 and 2019 Poland spent **EUR 40.4 billion** for non-agricultural State aid, of which around **EUR 15.8 billion** under notified measures and around **EUR 24.6 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Poland absorbed **50.3%** of the total spending (around EUR 5.44 billion).

Finally, the amount of co-financed in Poland corresponded to **EUR 2739 million** (around 50.3% of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (40.76%), Regional development (32.31%)** and **Environmental protection including energy savings (16.88%).**

3. State aid Spending – Top objectives & instruments



Around **55.4%** of State aid spending in Poland was concentrated in two main policy objectives. Around **29.6%** was directed towards **“Regional development”** while **25.8%** to **“Environmental protection including energy savings”.**

Poland devoted around 20.5% towards “Research and development including innovation” and 14% to “Employment”.

The top 4 key articles absorbed about 64.8% of the total GBER spending. The most widely used is **“Regional aid - investment aid (Art. 14) for scheme”, (21.6%),** followed by **“Aid for the employment of workers with disabilities in the form of wage subsidies (Article 33)”, (18.6%), “Industrial research (Art. 25(2)(b))”, (13.2%), “Experimental development (Art. 25(2)(c))”, (11.4%).**

In terms of State aid instruments, Poland privileged the use of **“Direct grant/ Interest rate subsidy”** (around EUR 3291 million, **60.5%** of total State aid spending), followed by **“Direct grant”** (EUR 1147 million, **21.1%** of total State aid spending), and **“Tax advantage or tax exemption”** (around EUR 345 million, **6.3%** of total State aid spending).

22.Member State focus 2019 - Portugal

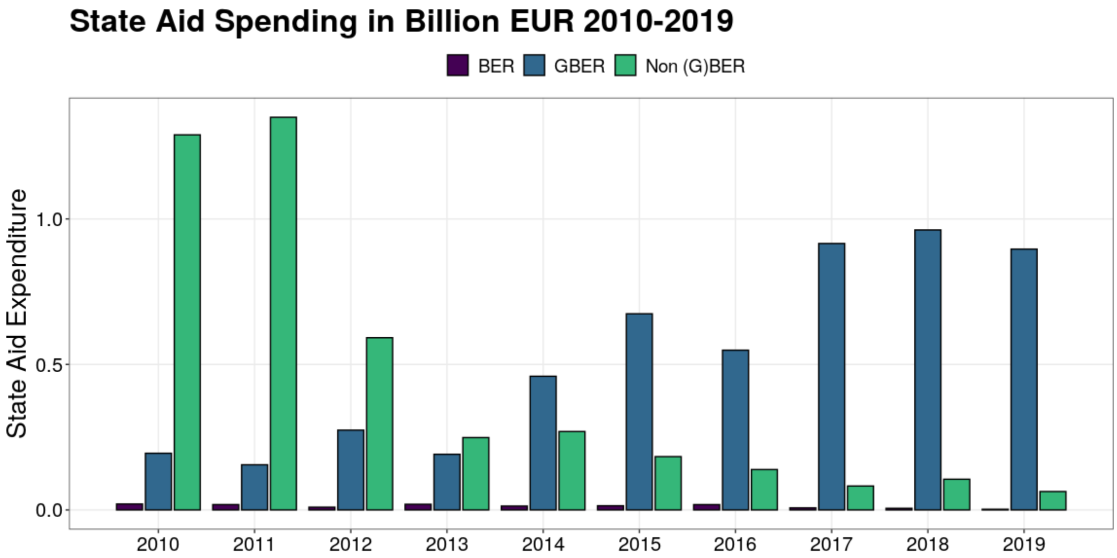
1. Case and procedural information

The total number of active measures corresponded to **50 in 2019** of which 43 GBER (X), **6 notified (N)** and **1 BER**.

In 2019, the share of GBER measures in Portugal reached 86% of the total, with **100%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

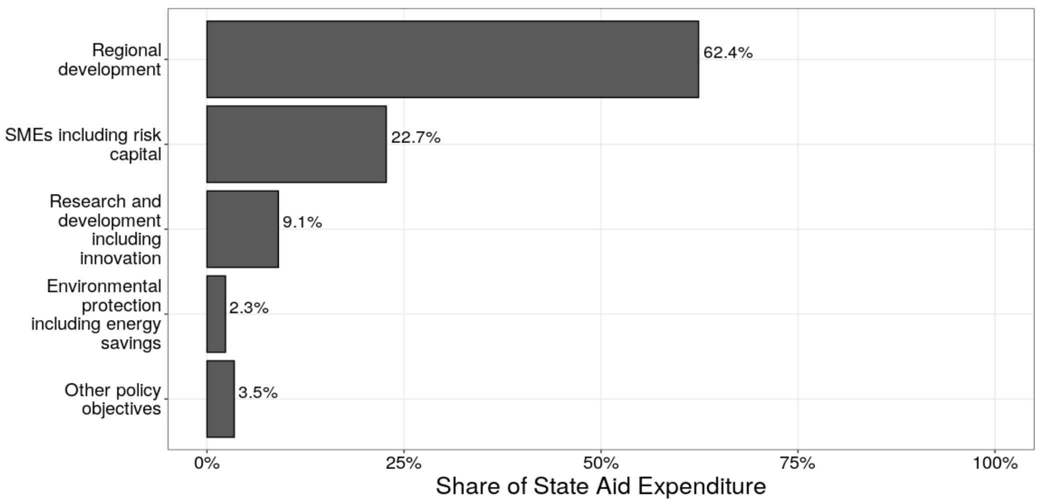
Between 2010 and 2019 Portugal spent **EUR 9.7 billion** for non-agricultural State aid, of which around **EUR 4.3 billion** under notified measures and around **EUR 5.4 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Portugal absorbed 65.7% of the total spending (around EUR 0.96 billion).

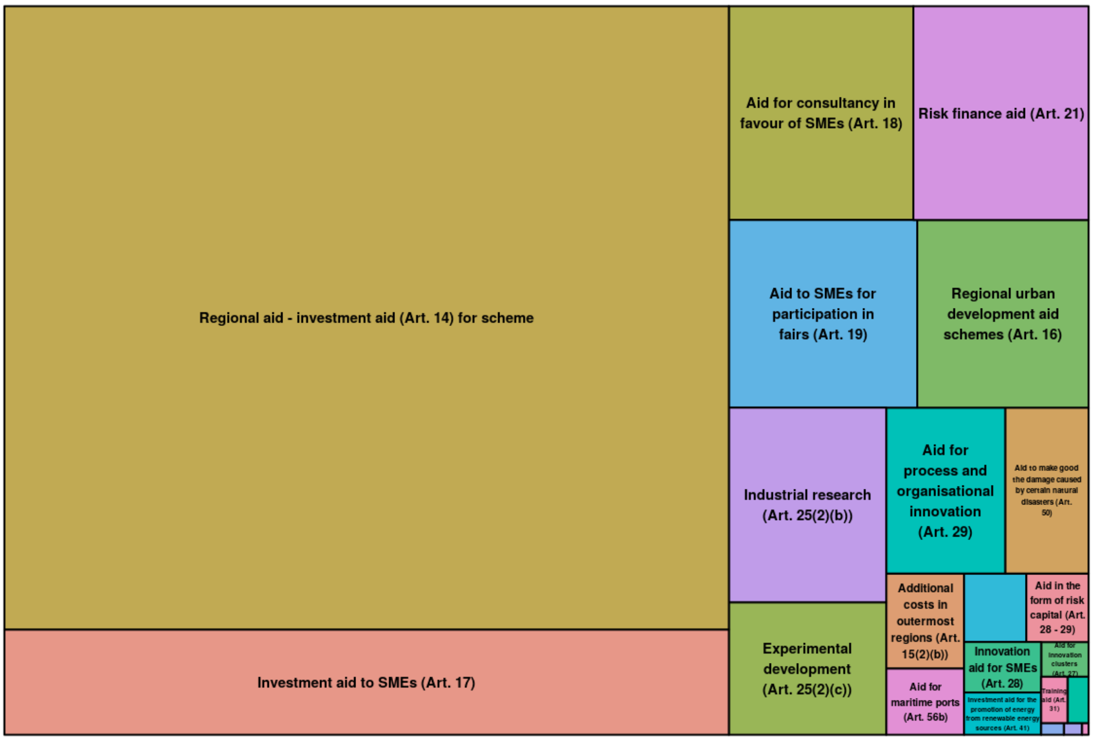
Finally, the amount of co-financed in Portugal corresponded **to EUR 549 million** (around 57.2% of the total non-agricultural spending) and was mostly concentrated in **Regional development (54.65%), SMEs including risk capital (23.58%)** and **Research and development including innovation (15.86%).**

3. State aid Spending – Top objectives & instruments



Around **85.1%** of State aid spending in Portugal was concentrated in two main policy objectives. Around **62.4%** was directed towards **“Regional development”** while 22.7% to **“SMEs including risk capital”.**

Portugal devoted around 9.1% towards “Research and development including innovation” and 2.3% to “Environmental protection including energy savings”.



The top 4 key articles absorbed about 76.6% of the total GBER spending. The most widely used is **“Regional aid - investment aid (Art. 14) for scheme”, (57.2%),** followed by **“Investment aid to SMEs (Art. 17)”, (9.7%), “Aid for consultancy in favour of SMEs (Art. 18)”, (5%), “Risk finance aid (Art. 21)”, (4.7%).**

In terms of State aid instruments, Portugal privileged the use of **“Other”** (around EUR 301 million, **31.3%** of total State aid spending), followed by **“Loan/ Repayable advances”** (EUR 264 million, **27.4%** of total State aid spending), and **“Direct grant/ Interest rate subsidy”** (around EUR 243 million, **25.3%** of total State aid spending).

23. Member State focus 2019 - Romania

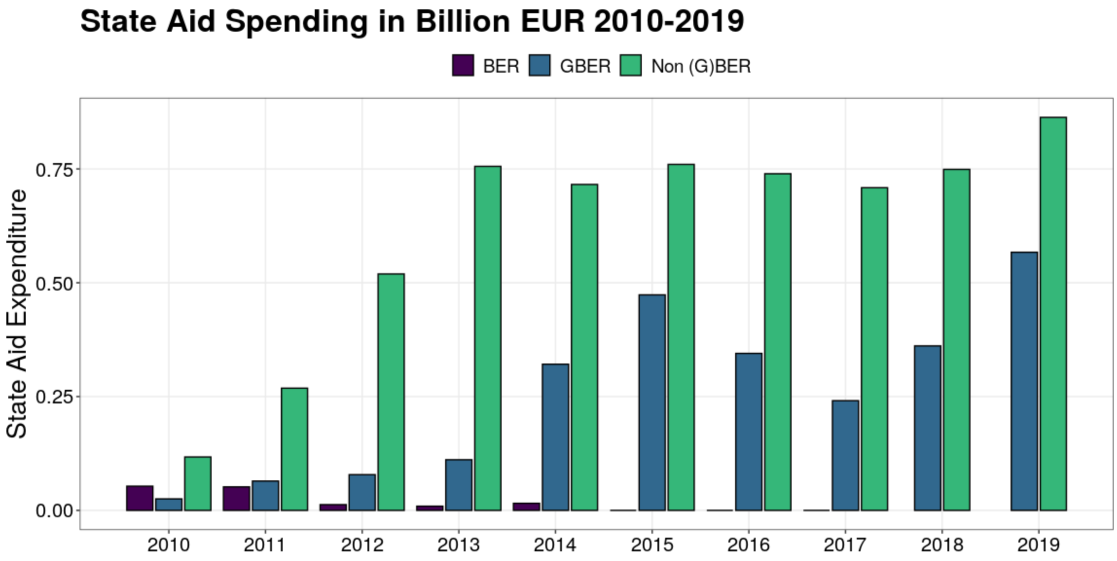
1. Case and procedural information

The total number of active measures corresponded to **45 in 2019** of which 33 GBER (X) and **12 notified (N).**

In 2019, the share of GBER measures in Romania reached 73.3% of the total, with **100%** of all newly implemented measures falling under **GBER.**

2. State aid spending - overview

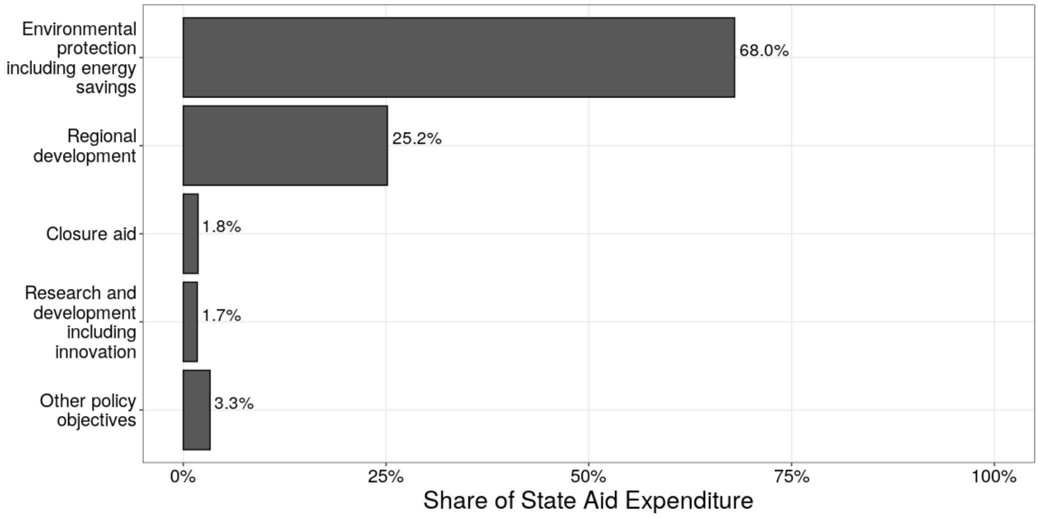
Between 2010 and 2019 Romania spent **EUR 8.9 billion** for non-agricultural State aid, of which around **EUR 6.2 billion** under notified measures and around **EUR 2.7 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Romania absorbed **77.6%** of the total spending (around EUR 1.43 billion).

Finally, the amount of co-financed in Romania corresponded to **EUR 321 million** (around 22.4% of the total non-agricultural spending) and was mostly concentrated in **Regional development (82.87%), Other (5.44%) and Research** and **development including innovation (5.4%).**

3. State aid Spending – Top objectives & instruments



Around **93.2%** of State aid spending in Romania was concentrated in two main policy objectives. Around **68%** was directed towards **"Environmental protection including energy savings"** while **25.2%** to **"Regional development".**

Romania devoted around 1.8% towards "Closure aid" and 1.7% to "Research and development including innovation".

The top 4 key articles absorbed about 90.5% of the total GBER spending. The most widely used is **"Regional aid - investment aid (Art. 14) for scheme", (62%),** followed by **"Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)", (23.6%), "Aid for broadband infrastructure (Art. 52)", (3.1%), "Industrial research (Art. 25(2)(b))", (1.8%).**

In terms of State aid instruments, Romania privileged the use of **"Other"** (around EUR 680 million, **47.5%** of total State aid spending), followed by **"Direct grant/ Interest rate subsidy"** (EUR 542 million, **37.9%** of total State aid spending), and **"Other forms of tax advantage"** (around EUR 108 million, **7.6%** of total State aid spending).

24. Member State focus 2019 - Slovakia

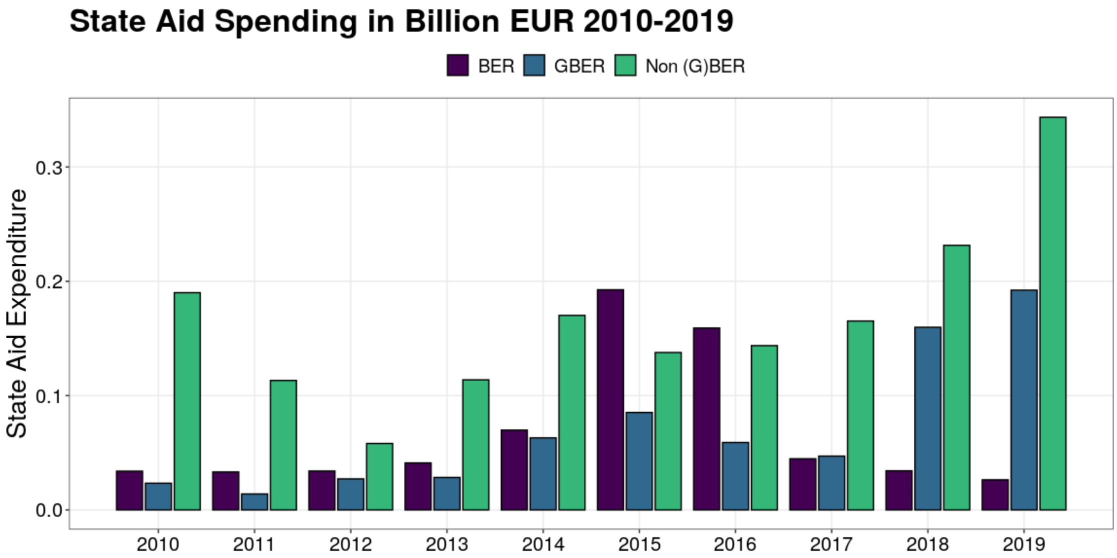
1. Case and procedural information

The total number of active measures corresponded to **39 in 2019** of which 27 GBER (X), **11 notified (N)** and **1 BER**.

In 2019, the share of GBER measures in Slovakia reached 69.2% of the total, with **85.7%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

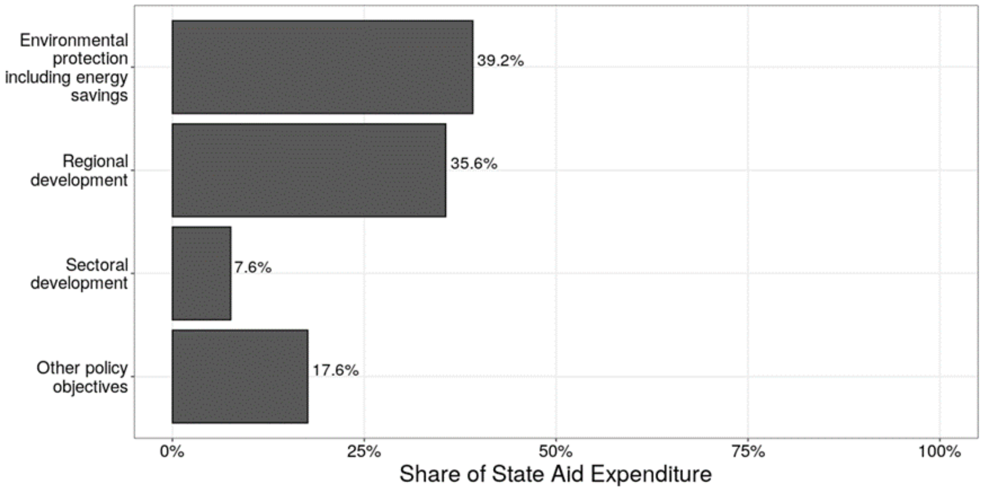
Between 2010 and 2019 Slovakia spent **EUR 3 billion** for non-agricultural State aid, of which around **EUR 1.6 billion** under notified measures and around **EUR 1.4 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Slovakia absorbed **65%** of the total spending (around EUR 0.56 billion).

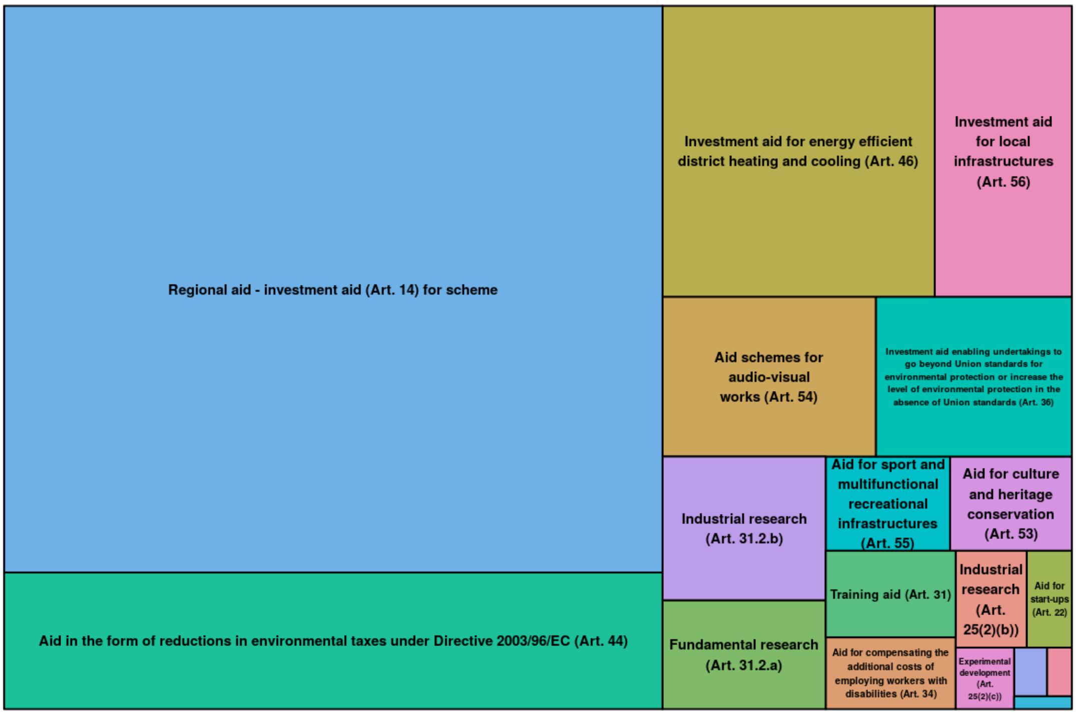
Finally, the amount of co-financed in Slovakia corresponded to **EUR 111 million** (around 19.8% of the total non-agricultural spending) and was mostly concentrated in **Environmental protection including energy savings (56.01%), Regional development (37.58%)** and **Employment (2.8%).**

3. State aid Spending – Top objectives & instruments



Around **74.8%** of State aid spending in Slovakia was concentrated in two main policy objectives. Around **39.2%** was directed towards **“Environmental protection including energy savings”** while **35.6%** to **“Regional development”**.

Slovakia devoted around 7.6% towards “Sectoral development” and 17.6% to “Other policy objectives”.



The top 4 key articles absorbed about 77.5% of the total GBER spending. The most widely used is **“Regional aid - investment aid (Art. 14) for scheme”, (49.7%),** followed by **“Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)”, (12%), “Investment aid for energy efficient district heating and cooling (Art. 46)”, (10.5%), “Investment aid for local infrastructures (Art. 56)”, (5.3%).**

In terms of State aid instruments, Slovakia privileged the use of **“Direct grant”** (around EUR 193 million, **34.3%** of total State aid spending), followed by **“Tax rate reduction”** (EUR 131 million, **23.4%** of total State aid spending), and **“Other”** (around EUR 110 million, **19.6%** of total State aid spending).

25.Member State focus 2019 - Slovenia

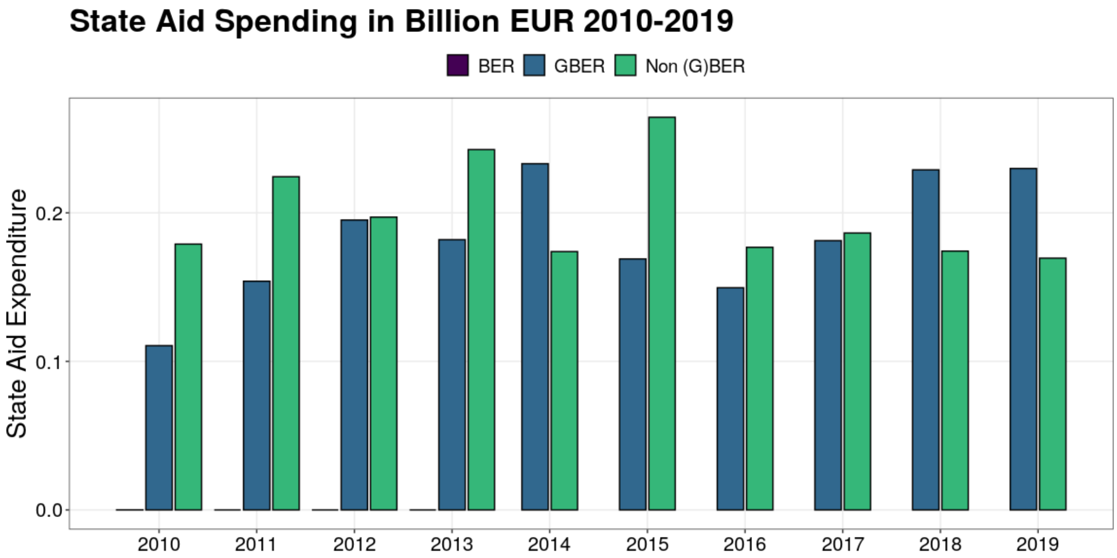
1. Case and procedural information

The total number of active measures corresponded to **31 in 2019** of which 24 GBER (X) and **7 notified (N).**

In 2019, the share of GBER measures in Slovenia reached 77.4% of the total, with 100% of all newly implemented measures falling under GBER.

2. State aid spending - overview

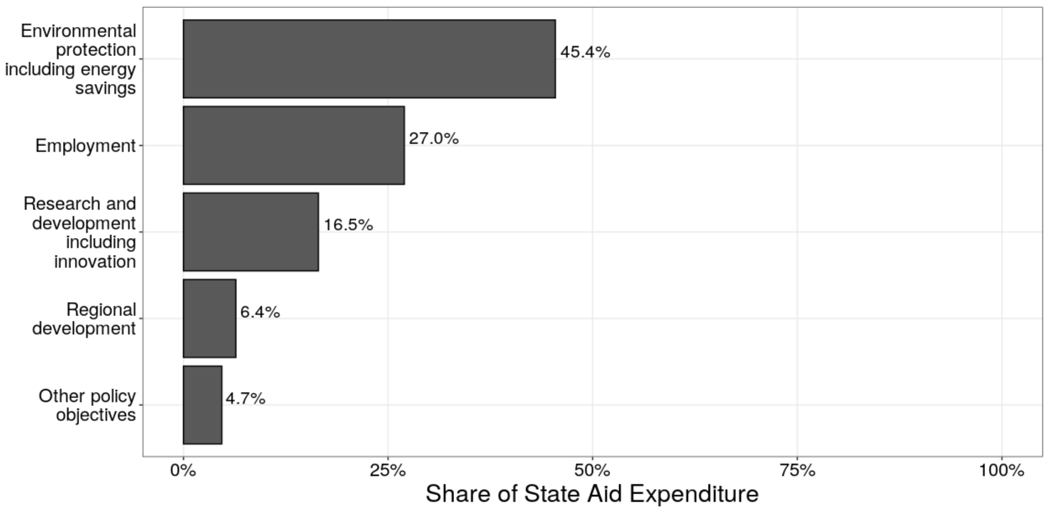
Between 2010 and 2019 Slovenia spent **EUR 3.8 billion** for non-agricultural State aid, of which around **EUR 2 billion** under notified measures and around **EUR 1.8 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Slovenia absorbed **82%** of the total spending (around EUR 0.4 billion).

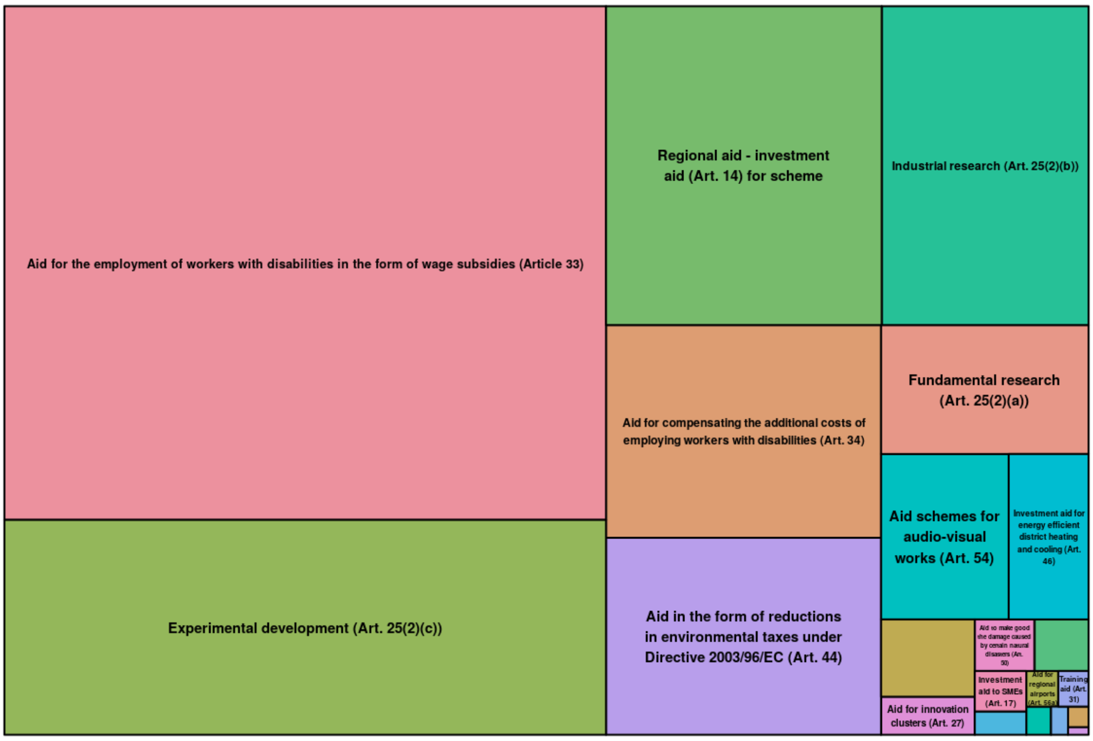
Finally, the amount of co-financed in Slovenia corresponded to **EUR 73 million** (around 18.2% of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (78.52%), Regional development (15.06%)** and **Environmental protection including energy savings (5.24%).**

3. State aid Spending – Top objectives & instruments



Around **72.4%** of State aid spending in Slovenia was concentrated in two main policy objectives. Around **45.4%** was directed towards **“Environmental protection including energy savings”** while **27%** to **“Employment”.**

Slovenia devoted around 16.5% towards “Research and development including innovation” and 6.4% to “Regional development”.



The top 4 key articles absorbed about 74.9% of the total GBER spending. The most widely used is **“Aid for the employment of workers with disabilities in the form of wage subsidies (Article 33)”, (39.1%),** followed **by “Experimental development (Art. 25(2)(c))”, (16.4%), “Regional aid - investment aid (Art. 14) for scheme”, (11.1%), “Industrial research (Art. 25(2)(b))”, (8.3%).**

In terms of **State aid instruments**, Slovenia privileged the use of **“Direct grant” (around EUR 149 million, 37.3% of total State aid spending),** followed **by “Direct grant/ Interest rate subsidy” (EUR 122 million, 30.6% of total State aid spending),** and “**Tax advantage or tax exemption” (around EUR 105 million, 26.4% of total State aid spending).**

26.Member State focus 2019 - Spain

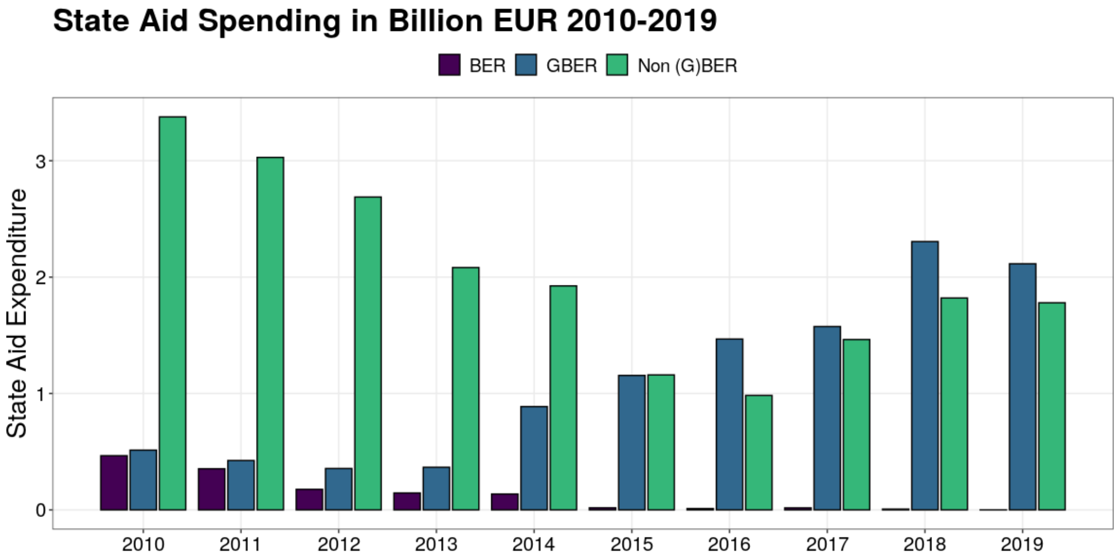
1. Case and procedural information

The total number of active measures corresponded to **400 in 2019** of which 378 GBER (X), **21 notified (N)** and **1 BER**.

In 2019, the share of GBER measures in Spain reached 94.5% of the total, with 98.5% of all newly implemented measures falling under GBER.

2. State aid spending - overview

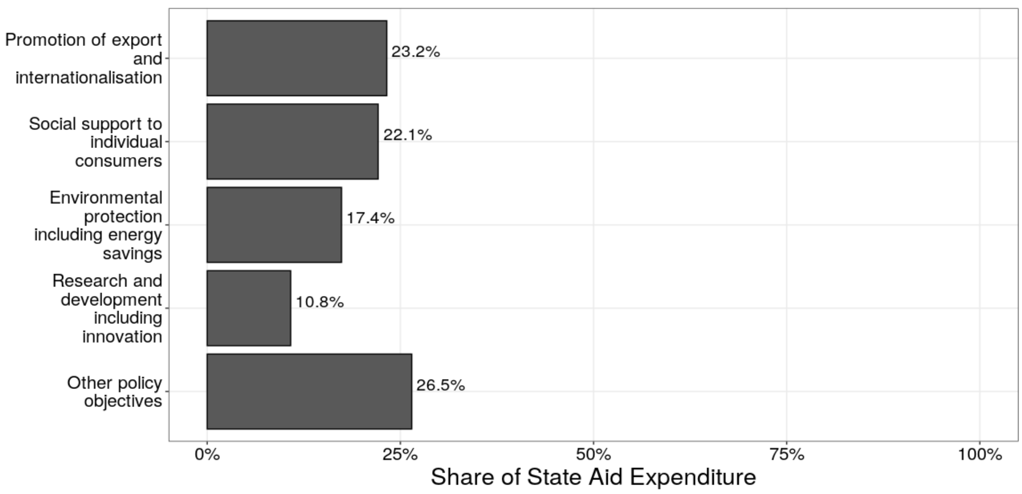
Between 2010 and 2019 Spain spent **EUR 32.8 billion** for non-agricultural State aid, of which around **EUR 20.3** billion under notified measures and around **EUR 12.5 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Spain absorbed **59.1%** of the total spending (around EUR 3.89 billion).

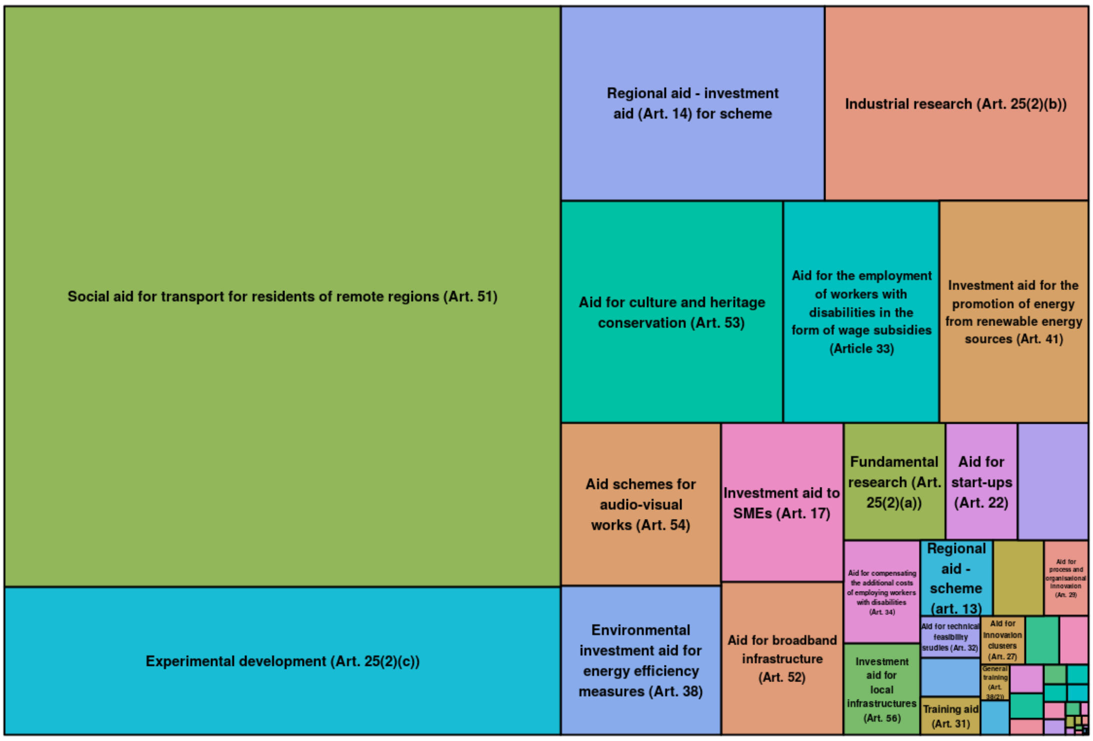
Finally, the amount of co-financed in Spain corresponded to **EUR 788 million** (around 20.3% of the total non-agricultural spending) and was mostly concentrated in **Research and development including innovation (38.32%), Other (24.11%)** and **Regional development (15.77%).**

3. State aid Spending – Top objectives & instruments



Around **45.3%** of State aid spending in Spain was concentrated in two main policy objectives. Around **23.2%** was directed towards **“Promotion of export and internationalisation”** while **22.1%** to **“Social support to individual consumers”.**

Spain devoted around 17.4% towards “Environmental protection including energy savings” and 10.8% to “Research and development including innovation”.



The top 4 key articles represent about 64.3% of the total GBER spending. The most widely used is **“Social aid for transport for residents of remote regions (Art. 51)”, (40.9%),** followed by **“Experimental development (Art. 25(2)(c))”, (10.4%), “Regional aid - investment aid (Art. 14) for scheme”, (6.5%), “Industrial research (Art. 25(2)(b))”, (6.5%).**

In terms of **State aid instruments**, Spain privileged the use of **“Direct grant/ Interest rate subsidy”** (around EUR 2087 million, **53.6%** of total State aid spending), followed by **“Tax base reduction”** (EUR 905 million, **23.2%** of total State aid spending), and **“Direct grant”** (around EUR 540 million, **13.9%** of total State aid spending).

27.Member State focus 2019 - Sweden

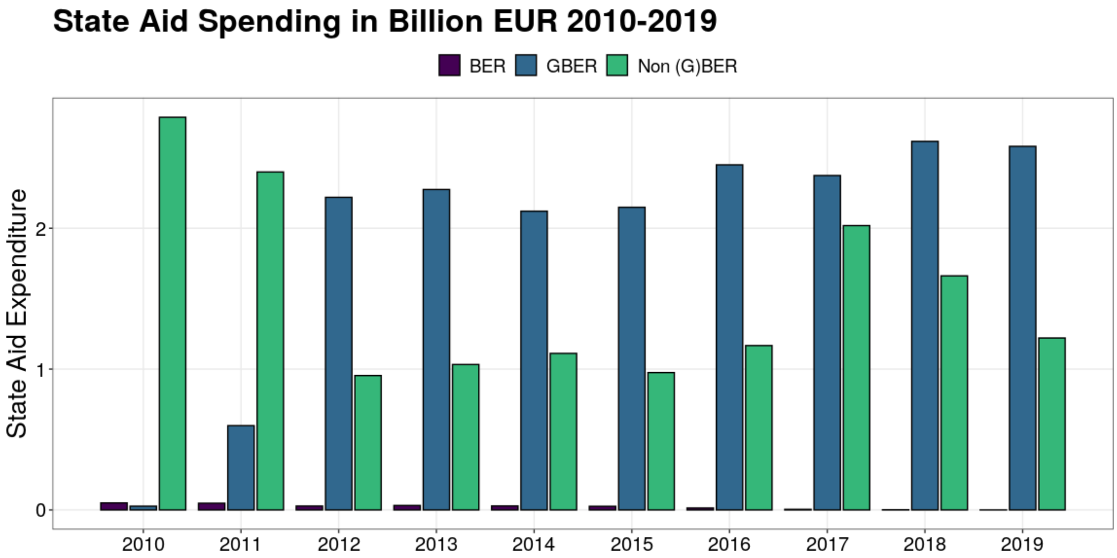
1. Case and procedural information

The total number of active measures corresponded to **104 in 2019** of which 84 GBER (X), **19 notified (N)** and **1 BER**.

In 2019, the share of GBER measures in Sweden reached 80.8% of the total, with **100%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

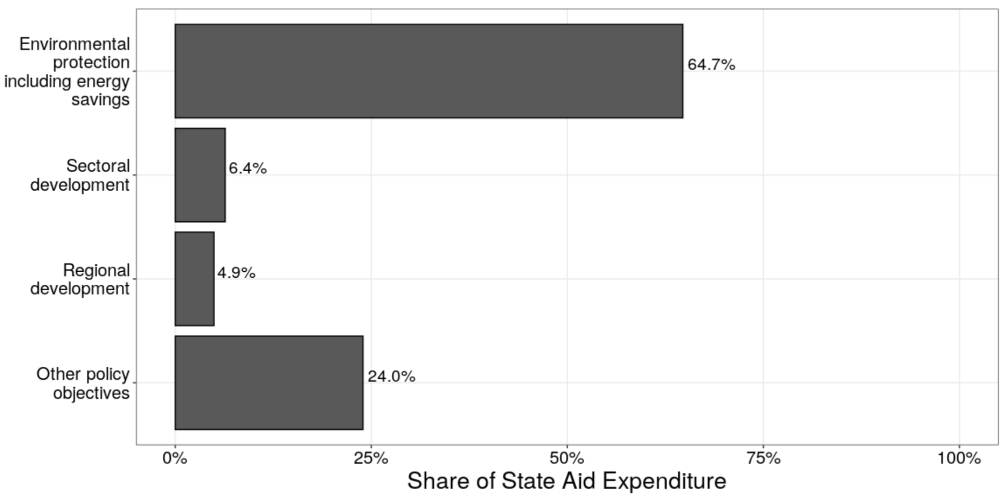
Between 2010 and 2019 Sweden spent **EUR 35 billion** for non-agricultural State aid, of which around **EUR 15.3 billion** under notified measures and around **EUR 19.7 billion** under BER and the 2008 and 2014 GBER.



In 2019, State aid spending for the **5 biggest** State aid measures in Sweden absorbed **70.6%** of the total spending (around EUR 3.8 billion).

Finally, the amount of co-financed in Sweden corresponded to **EUR 130 million** (around 3.4% of the total non-agricultural spending) and was mostly concentrated in **Other (56.5%), Regional development (19.97%)** and **SMEs including risk capital (14.8%).**

3. State aid Spending – Top objectives & instruments



Around **71.1%** of State aid spending in Sweden was concentrated in two main policy objectives. Around **64.7%** was directed towards **"Environmental protection including energy savings"** while **6.4%** to **"Sectoral development"**.

Sweden devoted around 4.9% towards "Regional development" and 24% to "Other policy objectives".

The top 4 key articles absorbed about 80.7% of the total GBER spending. The most widely used is **"Environmental aid in the form of tax reductions (Art. 25)", (58.5%),** followed by **"Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)", (10.8%), "Investment aid for local infrastructures (Art. 56)", (6.2%), "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)", (5.2%).**

In terms of State aid instruments, Sweden privileged the use of **"Other forms of tax advantage"** (around EUR 1488 million, 39.2% of total State aid spending), followed by **"Direct grant/ Interest rate subsidy"** (EUR 818 million, 21.5% of total State aid spending), and **"Direct grant"** (around EUR 644 million, 16.9% of total State aid spending).

28.Focus 2019 – United Kingdom[44]

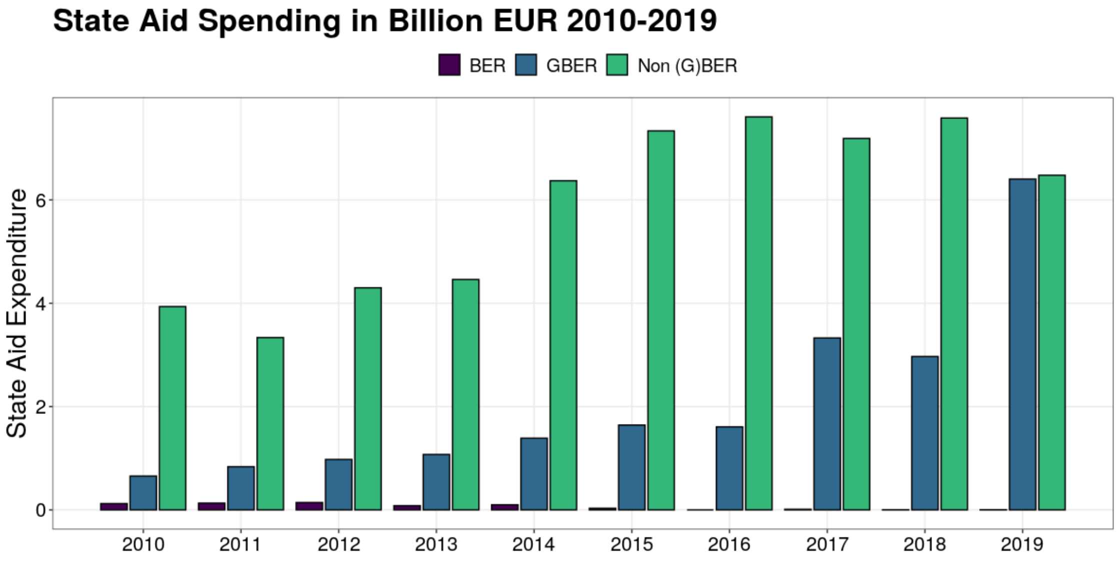
1. Case and procedural information

The total number of active measures corresponded to **162 in 2019** of which 128 GBER (X), **33 notified (N)** and **1 BER.**

In 2019, the share of GBER measures in United Kingdom reached 79% of the total, with **92.3%** of all newly implemented measures falling under **GBER**.

2. State aid spending - overview

Between 2010 and 2019 United Kingdom spent **EUR 80.1 billion** for non-agricultural State aid, of which around **EUR 58.6** billion under notified measures and around **EUR 21.5 billion** under BER and the 2008 and 2014 GBER.

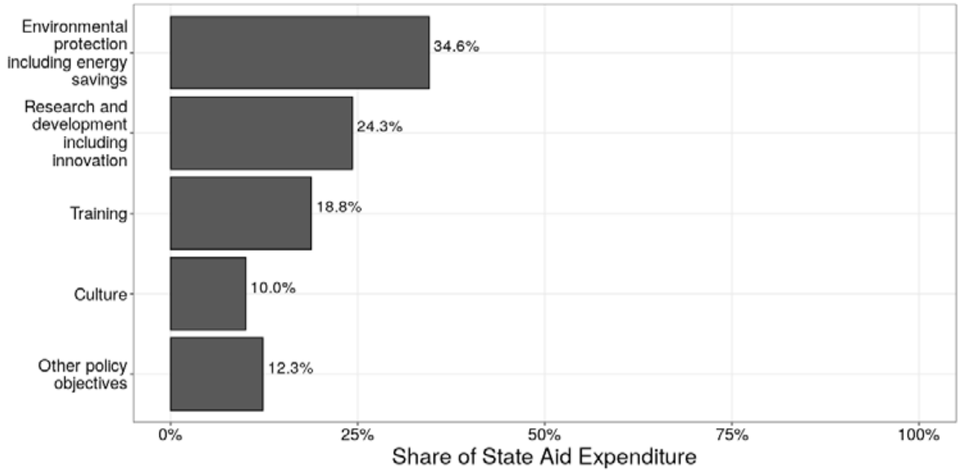


In 2019, State aid spending for the **5 biggest** State aid measures in United Kingdom absorbed **65.8%** of the total spending (around EUR 12.88 billion).

Finally, the amount of co-financed in United Kingdom corresponded to **EUR 2844 million** (around 22.1% of the total non-agricultural spending) and was mostly concentrated in **Training (84.01%), Regional development (5.58%)** and **Research and development including innovation (4.18%).**

3. State aid Spending – Top objectives & instruments

[44] Until 31 January 2020 and the entry into force of the withdrawal agreement, the United Kingdom was a Member State of the European Union. It therefore appears as such in the State aid Scoreboard. Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community (2019/C 384 I/01, OJ C 384I , 12.11.2019, p. 1–177)



Around **58.9%** of State aid spending in United Kingdom was concentrated in two main policy objectives. Around **34.6%** was directed towards **"Environmental protection including energy savings"** while **24.3%** to **"Research and development including innovation".**

United Kingdom devoted around 18.8% towards "Training" and 10% to "Culture".

The top 4 key articles absorbed about 85.7% of the total GBER spending. The most widely used is **"Training aid (Art. 31)", (37.5%),** followed by **"Fundamental research (Art. 25(2)(a))", (35.3%), "Industrial research (Art. 25(2)(b))", (9.8%), "Aid in the form of reductions in environmental taxes under Directive 2003/96/EC (Art. 44)", (3.1%).**

In terms of State aid instruments, United Kingdom privileged the use of **"Direct grant"** (around EUR 3917 million, **30.4%** of total State aid spending), followed by **"Direct grant/ Interest rate subsidy"** (EUR 3702 million, 28.7% of total State aid spending), and **"Tax advantage or tax exemption"** (around EUR 2614 million, **20.3%** of total State aid spending).