European Commission

Regional and Urban Policy

MID-TERM EVALUATION OF THE EUROPEAN REGIONAL DEVELOPMENT FUND, THE COHESION FUND AND THE JUST TRANSITION FUND

2021 2027

POLICY OBJECTIVE 3 CONNECTED EUROPE

EUROPEAN COMMISSION

Directorate-General for Regional and Urban Policy
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Annex 6.5
Fiche Policy Objective 3
“Connected Europe”

Directorate-General for Regional and Urban Policy

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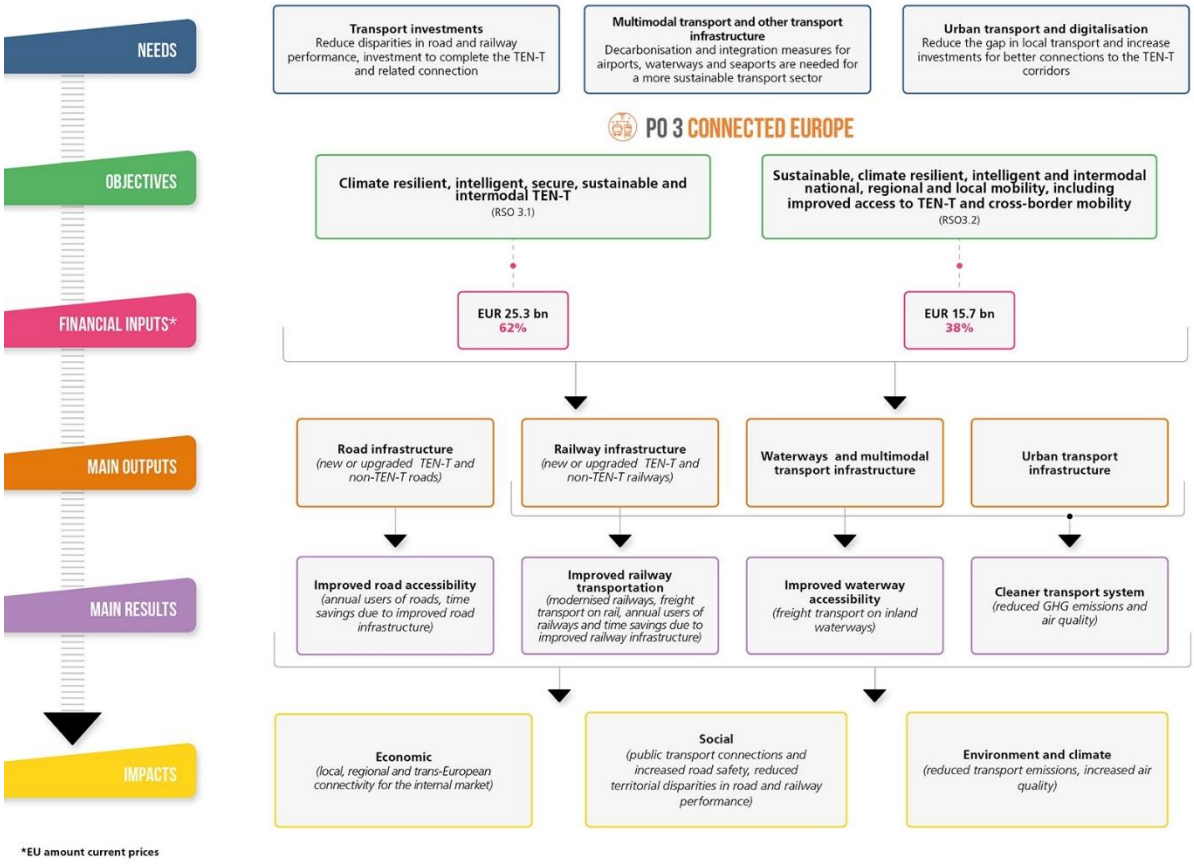
Policy objective 3: ‘Connected Europe’

This fiche describes the intervention logic of PO3 and summarises key evaluation findings and lessons learnt. The illustration of the intervention logic covers needs, objectives, inputs, activities, outputs, results and impacts.

1. Part 1: Intervention logic

The following infographic summarises the main components of the PO 3 intervention logic which are described in this first part of the fiche.

Figure 1 - PO3 Intervention logic illustration



Source: Consortium elaboration

1.1. Needs

The necessity to connect territories is a crucial aspect of territorial cohesion and the broader objective of cohesion policy on mobility is to promote sustainable transport and remove transport bottlenecks. Given the diversity of geographical features, demographic distribution and the disparity in connectivity around the EU, ensuring mobility across territories becomes central to overcoming socioeconomic distances ([1]). Disparities in transport connectivity can be seen between Member

([1]) This chapter draws from the analysis of the European Commission 9th Cohesion Report (2024), Chapter 3 – Cohesion and territorial diversity, the EC COM(2021) 345 'A long-term Vision for the EU's Rural Areas – Towards stronger, connected, resilient and prosperous rural areas by

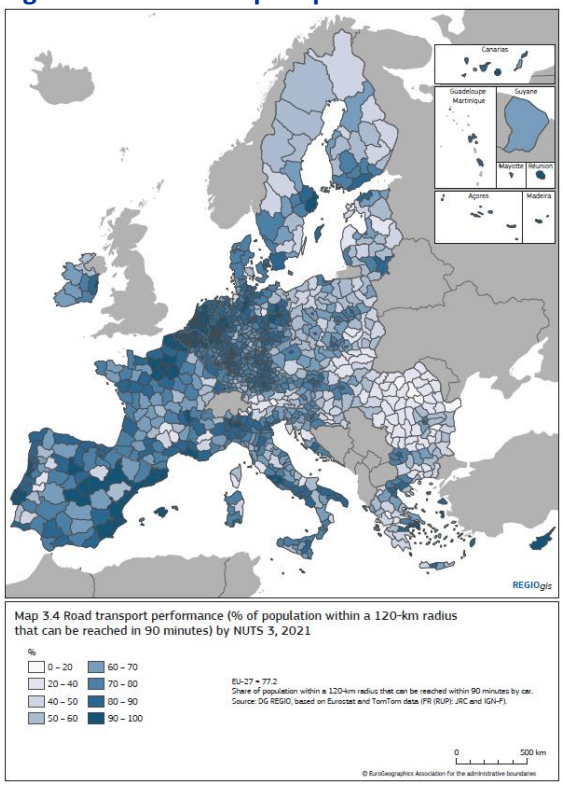
States and types of territories, and the two aspects are often interrelated. Rural and scarcely densely populated areas, alongside geographically disadvantaged territories such as islands, outermost, mountain and border regions, pose significant obstacles in ensuring adequate transport connectivity.

For these reasons, the mobility needs and objectives of EU Member States and regions are focused on improving road and rail network connectivity, especially in places with limited connections. More remote and scarcely densely populated areas enjoy less robust rail infrastructure, requiring more attention to ensure a well-connected road infrastructure. Road accessibility depends on the density of road infrastructure, which varies around the EU. Motorways connecting major hubs for long-distance journeys are better developed in north-western and southern Member States. There are gaps in Romania, Bulgaria, Estonia and Latvia, meaning less road access for their population. This is reflected in the road transport performance estimate that still shows persistent disparities across the EU, particularly in low-density populated areas (Figure 2).

According to the position paper of the TEN-T Coordinators the costs for the completion of the TEN-T core and extended core network are estimated at around EUR 845 billion for the next 15 years. For projects with the highest cross-border relevance only, the remaining amount to be invested is estimated at around EUR 210 billion. Successful implementation of programming period 2021-27 is crucial for the realisation of the TEN-T core network by 2030, but also making progress on the extended core by 2040 and the comprehensive network by 2050.

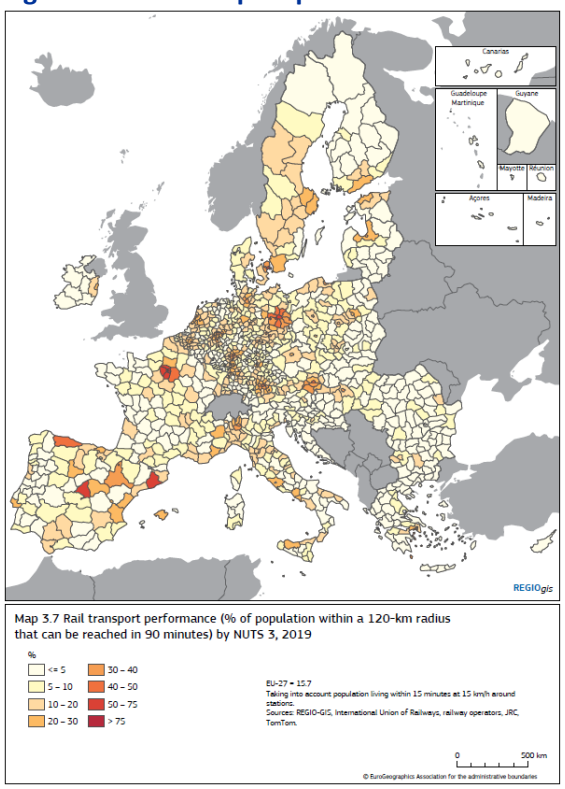
2040 and TEN-T Coordinators' Position Paper (2024) 'Connecting Europe. A transport funding and financing that is adapted to the challenges ahead'

Figure 2 - Road transport performance



Source: Reproduced from ninth Cohesion Report, chapter 3

Figure 3 - Rail transport performance



Source: reproduced from ninth Cohesion Report, chapter 3

Rail networks and rail connectivity are essential components of EU objectives for an alternative, more sustainable means of transport in line with EU climate policy. An analysis of EU rail performance shows that substantial disparities persist across European regions and Member States, where eastern regions have less investment in rail networks. The discrepancy is evident in the rural-urban divide, as the density of the population ensures easier access to means of transportation, especially rail (Figure 3).

The necessity to connect territories is coupled with the need to reduce the negative externalities of the transport sector, in line with the necessary shift to a zero-emission mobility as underlined in the Green Deal. As reported by the European Environment Agency, the transport sector is responsible for about a quarter of EU total greenhouse fad emissions, and it is also a source of air pollution, noise pollution and habitat fragmentation negatively impacting biodiversity. Investments in transport will therefore have to face these fundamental challenges.

1.2. Objectives

In 2020, the Commission published the *'Sustainable and Smart Mobility Strategy' ([2])* on the future of European transport, detailing milestones for 2030, 2035 and 2050. The Strategy considers Green Deal objectives, outlining sustainable, smart and resilient mobility. The strategy also highlights the necessity to coordinate and prioritise EU funding programmes to achieve the objectives.

In line with European Green Deal and Sustainable and Smart Mobility Strategy objectives, the priorities for transport are defined with relevant policy directions contained in the 2024 TEN-T Regulation, the Alternative Fuels Infrastructure Regulation, and the Urban Mobility Framework, to name but a few.

The EU strategy seeks to develop coherent, efficient, multimodal and high-quality transport infrastructure across the EU, based on the Trans-European Transport Network (TEN-T). This entails the development of railways, inland waterways, short sea shipping routes and roads linking urban nodes, maritime and inland ports, airports and terminals. The ultimate objective of the TEN-T is to strengthen EU economic, social and territorial cohesion by promoting transport systems across borders. The TEN-T Regulation ([3]) envisions two networks, the core network and the comprehensive network, to establish connections around the EU without gaps and missing links. The core network includes connections between major cities and nodes to be completed by 2030. The comprehensive network links all European regions to the core network and should be completed by 2050. ([4]) The core network comprises nine corridors alongside crucial traffic lines crossing the EU from North to South and East to West. Two horizontal priorities—the European Rail Traffic Management System and Motorways of the Sea—are added to these corridors.

Policy objective 3 focuses on the competition of the TEN-T and improving connections to the network, but it also finances national, regional and local mobility, as well as digital solutions. In line with the objective of enhancing mobility, under PO3, the ERDF and CF Regulation provides two specific objectives:

- Specific objective 1 (RSO3.1) – Developing a climate resilient, intelligent, secure, sustainable and intermodal Trans-European transport (TEN-T),

([2]) Sustainable and Smart Mobility Strategy. Putting European transport on track for the future; Mobility and Transport (EC)

([3]) Regulation (EU) 2024/1679 of 13 June 2024 on Union guidelines for the development of the trans-European transport network, amending Regulations (EU) 2021/1153 and (EU) No 913/2010 and repealing Regulation (EU) No 1315/2013

([4]) A revision of the TEN-T Regulation, currently ongoing, will envision an intermediate 2040 milestone for building the extended core network.

- Specific objective 2 (RSO3.2) – Developing and enhancing sustainable, climate resilient, intelligent and intermodal national, regional and local mobility, including improved access to TEN-T and cross-border mobility.

1.3. Programme Inputs

1.3.1. Financial planned resources

The first part of this section provides an overview, presents the ERDF planned amounts, their distributions across Member States, specific objectives and categories of regions defined by Article 108 CPR as less developed, transition, and more developed regions.

The second part assesses the territorial distribution of the planned financial resources by using the intervention fields which primarily refer to the PO according to the Cohesion data platform correspondence table.

General overview

The total PO3 allocation is EUR 54.161 billion for 2021-27, with the EU funding component of EUR 40.975 billion, ranking fourth in size among policy objectives.

There is a relatively even split of resources between ERDF and CF, with the former accounting for 56% of the allocation (including 1% dedicated to Interreg). The disparities at the EU level in terms of transport connectivity underline how some Member States have more need for investment in transport infrastructure. This is exemplified by CF supporting 15 Member States' investments in transport infrastructure. Almost two-thirds of the EU budget is allocated to RSO 3.1 ‘Developing a climate resilient, intelligent, secure, sustainable and intermodal TEN-T’, while one-third goes to RSO 3.2 ‘Developing and enhancing sustainable, climate resilient, intelligent and intermodal national, regional and local mobility, including improved access to TEN-T and cross-border mobility’. Almost 50% of the CF financial resources are allocated under PO3.

	Total funding allocation*	EU funding allocation*	Share PO 3	EU Population targeted	Top countries**
Specific objective RSO3.1	33.9	25.3	62%	42%	Poland, Romania, Czechia, Slovakia and Portugal
Specific objective RSO3.2	20.3	15.7	38%	45%	Poland, Romania, Italy, Czechia, and Greece

*Billion EUR, including ERDF/Interreg and CF
** RSO share of the total EU financial allocation

Geographical distribution

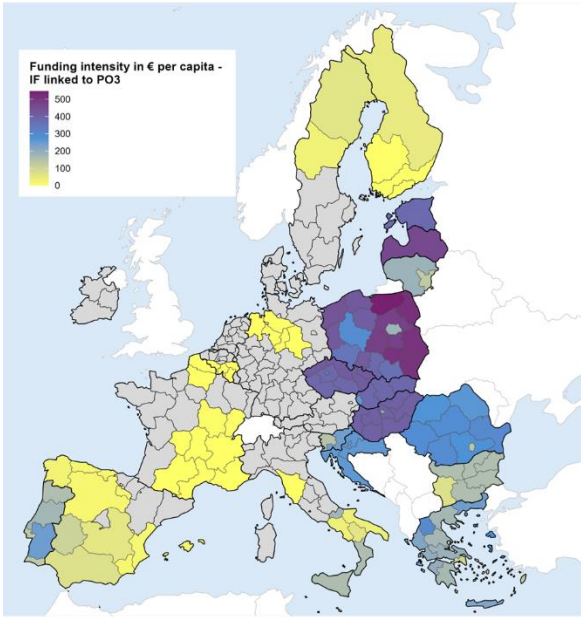
The 2019 European semester country specific recommendations formed the basis for defining sectoral priorities in the EU Member States. The top three Member States with the highest share of PO3 investments —Poland, Romania, and Czechia, also due to their eligibility for the Cohesion Fund — account for 60% of the EU financial allocations for PO3 ([5]). These also have the highest share of PO3 investments relative to total cohesion policy fund financial allocations. Six Member States do not invest under PO3 objectives: Austria, Germany, Denmark, Ireland, Luxembourg and the Netherlands. This is due to the fact that their transport networks are generally well developed and therefore it did not feature in the European Semester recommendations.

Investments under PO3 are concentrated in the outermost or northern sparsely populated and less developed regions. PO3 investments represent almost one-fourth of all ERDF investments for the former category, and around 13% of EU funding for less developed regions. PO3 accounts for only 6% in transition regions (from 25% in Poland to 1% in France), and 1% in more developed regions.

The distribution of ERDF resources between the two RSOs and regions' categories also differs. While for all categories, RSO3.1 has less than 50% of the total PO3 allocation, in less developed regions, it accounts for almost 40%, in transition and outermost/sparsely populated regions, around 7%, and in more developed regions, only 2%.

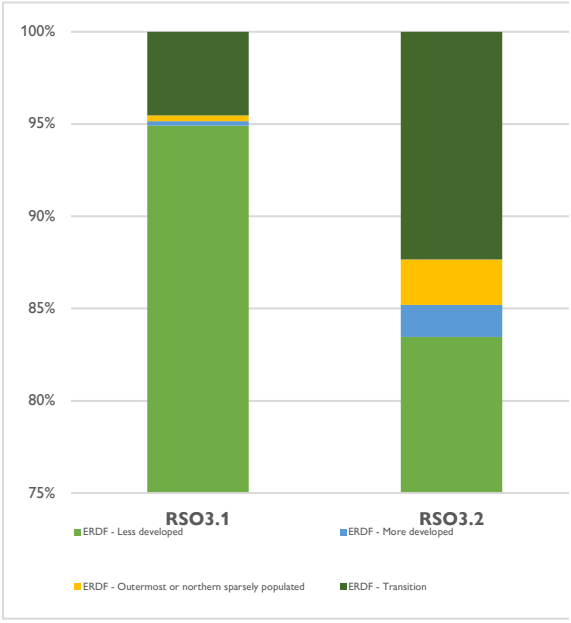
([5]) Seven Member States have a more than 4% share of the PO3 allocation: Poland (EUR 15 billion, 38%), Romania (EUR 5 billion, 12.6%), Czechia (EUR 4 billion, 10%), Slovakia (5%), Portugal (4.5%), Hungary (4%) and Greece (4%)

Map 1 - Nuts-2 region funding intensity (EUR per capita)



Source: Consortium elaboration, based on DG REGIO data

Figure 4 – ERDF allocation under PO3, categories of regions



Source: Consortium elaboration, based on Cohesion data '2021-2027 Financial details'

Territorial patterns of planned financial resources

DG REGIO Correspondence table intervention fields connected to PO3 investments enable an analysis of funding intensity across EU regions. The planned PO3 expenditure per capita averages EUR 91. But once again, varies across regional categories (Map 1):

- Less developed regions average of EUR 267 per capita for a total of EUR 32.9 bn
- Transition regions average of EUR 47 per capita for a total of EUR 5.3 bn
- More developed regions average of EUR 12 per capita for a total of EUR 2.4 bn

The areas with the highest PO3 engagement per capita are in eastern Europe, especially eastern Poland and Latvia. There is intense PO3-related intervention field funding in Czechia, Slovakia and Hungary. Apart from eastern Europe, other, often remote areas, such as Finland, Northern Sweden, South Italy, or the southern part of the Iberian Peninsula, use PO3 intensively.

The intervention fields linked to RSO 3.1 cover 61.5 million people living in rural areas (some 33% of the population). Intervention fields linked to RSO 3.1 cover 43.9 million people in less developed region rural areas, 2.1 million in more developed regions, and 15.6 million in transition regions. Intervention fields linked to RSO 3.2 cover 69.8 million people in rural areas (about 34% of the population). 43 million people in less developed region rural areas, 7.3 million in more developed regions,

and 19.5 million in transition regions are covered by intervention fields linked to RSO 3.2.

An analysis of funding intensity and objectives at the regional level highlights the uptake of funding under PO3. The darker gradients on the horizontal axis correspond to accessibility by rail and on the vertical axis to higher funding per capita.

PO3 funding is concentrated on less accessible regions across Europe, with a few exceptions (such as the Belgian-Dutch border). PO3 funding is also prevalent in central European regions, particularly Poland and Czechia, as well as parts of Hungary and Slovakia. However, some less accessible regions, mostly in southern Europe (particularly on the Iberian Peninsula, Sicily, Greece and Romania), northern Europe and Lithuania make little use of PO3 funding. Regions not applying funding overlap with more densely populated areas, but also include regions with constrained access (particularly in Ireland, Sardinia and Corsica, parts of France and Germany).

The relationship between funding per capita and accessibility by rail is not as clear-cut as in the analyses above. Regions with moderate to good access tend to invest more per capita. The most accessible regions invest less and regions with low access also have moderate investment per capita. For details on this analysis are presented in annex 6.3.

1.3.2. Administrative and organisational aspects

The majority of programmes at the EU level that invest in PO3 are regional multi-funds programmes. Around one-fourth of them are national programmes, including thematic programmes dedicated to transport investments, uniquely within PO2 and PO3. Several programmes refer to improved legal and administrative solutions related to transport investments from previous programming periods. For example, the Polish programme European Funds for Infrastructure, Climate, Environment 2021-2027, responsible for almost 30% of the EU allocation under RSO3.1, reports new measures to minimise risks with linear infrastructure projects. To minimise increased costs and delays in implementing infrastructure projects, a number of initiatives in Poland enable updated bills of quantities and remuneration indexing, especially to the construction and public procurement laws. To limit delays in administrative decisions by authorities, support was introduced (including by financing employee remuneration) for the authorities, e.g. supervising investments in compliance with construction law and archaeological aspects.

Another example is the Romanian Transport programme, which has a new managing authority, the Ministry of Transport. The programme is designed to reinforce the capacity of beneficiaries, which is key to ensuring smoother and more effective implementation. It is also an opportunity to improve governance in this sector, promote strategic public procurement and improve staff professionalism.

Mitigating implementation and capacity-related risks

One notable simplification from the previous programming period impacting PO3 is the removal of specific rules and procedures for 'major projects'. This reduces time-consuming procedures for major transport infrastructure projects. More than 50% of the survey respondents consider this very or extremely helpful in improving efficiency and effectiveness and/or reducing administrative burden.

Only one Simplified Cost Option (SCO) scheme has been selected and approved under PO3, by the Lithuanian multi-funds programme. This lump sum SCO under Article 94 CPR addresses costs related to mandatory visibility and information measures envisioned in the CPR provisions.

1.3.3. Enabling conditions

PO3 has one thematic enabling condition: Comprehensive transport planning at the appropriate level ([6]) This is fulfilled with the multimodal mapping of existing and planned infrastructure, except at the local level, until 2030. This mapping should include investments in TEN-T core network corridors and, for investments outside these, ensure complementarity by providing sufficient connectivity of urban networks, regions and local communities to the core TEN-T and its nodes. It should also include an economic assessment of planned investments, underpinned by demand analysis and traffic modelling, as well as information on financial resources for planned investments and the operation and maintenance of existing and planned infrastructure. The mapping should be consistent with integrated national energy and climate plan transport-related elements and promote multimodality and alternative fuels. Lastly, the programme should also include the assessment of road safety risks in line with existing national road safety strategies, mapping the affected roads and sections, and prioritising corresponding investments. The fulfilment of the thematic enabling condition for PO3 facilitates an assessment of funding sources for transport projects and coherence of interventions between national, cohesion policy and other EU fund investments.

1.4. Planned activities under PO 3

Planned actions under PO3 and specific objectives vary but can be categorised into main sub-themes of interventions (Annex I CPR). Analysis of the main intervention fields associated with each RSO provides a map of planned actions at EU level.

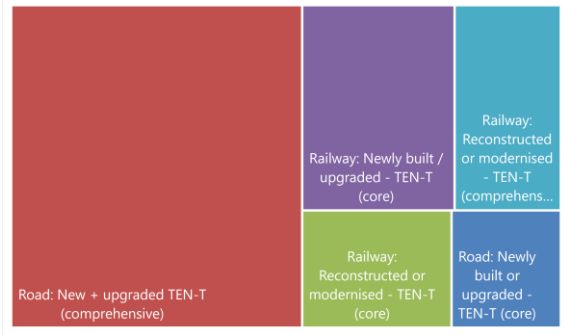
For RSO3.1 – Developing a climate resilient, intelligent, secure, sustainable and intermodal TEN-T, the main investments are concentrated in:

([6]) CPR Regulation – Annex IV Thematic enabling conditions applicable to ERDF, ESF+ and the Cohesion Fund – Article 15(1)

- Railway (TEN-T)
- Road (TEN-T)
- Multimodal transport (TEN-T)
- Other transport infrastructure, including airports, inland waterways and seaports (TEN-T)

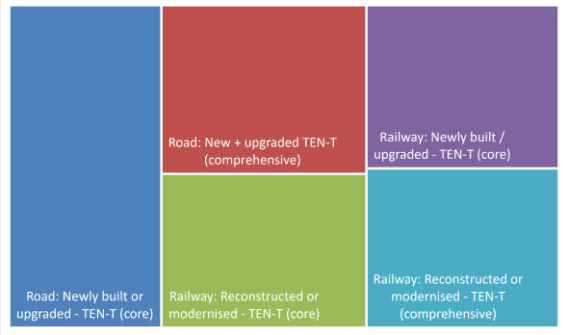
The analysis of intervention fields illustrates how EU resources under RSO3.1 are concentrated in railway investments as part of core and comprehensive TEN-T (around 44% of ERDF / CF and Interreg funding) ([7]). Around 40% of the first specific objective is dedicated to road investments (both core and comprehensive TEN-T) ([8]). Around 5% are dedicated to TEN-T seaport investments ([9]), and multimodal transport part of the TEN-T accounts for around 3.5% ([10]). There are variations between funds with investments in railways accounting for almost 50% of the CF allocation, 33% of ERDF and only around 8% of Interreg. Conversely, around 55% of PO3 funding in Interreg is classified under the intervention field '093 Road: other reconstructed or modernised', and less than 2% of these investments are for roads in TEN-T.

Figure 5 - Intervention fields with more than 5% of IJG/ERDF allocation RSO3.1



Source: Consortium elaboration, based on Cohesion data '2021-2027 financial details'

Figure 6 - Intervention fields with more than 5% share of IJG/CF allocation RSO3.1



Source: Consortium elaboration, based on Cohesion data '2021-2027 financial details'

([7]) These include intervention fields: 096 Railway: Newly built / upgraded - TEN-T (core), 097 Railway: Newly built / upgraded - TEN-T (comprehensive), 100 Railway: Reconstructed or modernised - TEN-T (core), 101 Railway Reconstructed or modernised - TEN-T (comprehensive), 105 Railway: European Rail Traffic Management System (ERTMS), 106 Railway: Mobile rail assets, 107 Railway: Mobile rail assets - zero emission.

([8]) Intervention fields: 087 Road: Newly built or upgraded - TEN-T (core), 088 Road: New + upgraded TEN-T (comprehensive), 091 Road: Reconstructed or modernised - TEN-T (core), 092 Road: Reconstructed or modernised - TEN-T (comprehensive), 094 Road: Digitalisation of transport, 095 Road: Digitalisation of transport - GHG emission reduction

([9]) Intervention fields 110 Seaports (TEN-T) and 111 Seaports (TEN-T) - no fossil fuel

([10]) Intervention field 108 Multimodal transport (TEN-T)

Regarding RSO3.2 – Developing and enhancing sustainable, climate, resilient, intelligent and intermodal national, regional and local mobility, including improved access to TEN-T and cross-border mobility – the main interventions are in:

- Other road infrastructure,
- Other railways infrastructure,
- Other transport infrastructure, multimodal, inland waterways and seaports,
- Cycling infrastructure.

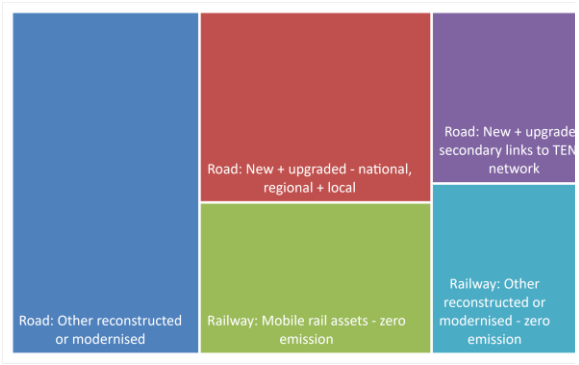
These describe the programme's macro-theme of intervention and planned measures at EU level. The analysis of intervention fields illustrates how resources under RSO3.2 at EU level are concentrated in other road investments as part of the link to TEN-T and other national, regional and local infrastructure (around 47% of the allocation of ERDF and 14% of Interreg funding) ([11]). Around 23% of the second specific objective is dedicated to other railway investments (heavily influenced by the 69% of CF allocated under this sub-theme) ([12]). Moreover, 11% of the allocation is dedicated to intervention field 107 Railway: Mobile rail assets - zero emission. Cycling infrastructure (intervention field 083) accounts for almost 3% of all the ERDF (including Interreg) and CF allocation.

The figures below provide a disaggregation of the allocation under RSO3.2 by main intervention fields for ERDF and CF:

([11]) These include intervention fields: 089 Road: New + upgraded secondary links to TEN-T network, 090 Road: New + upgraded - national, regional + local, 093 Road: Other reconstructed or modernised.

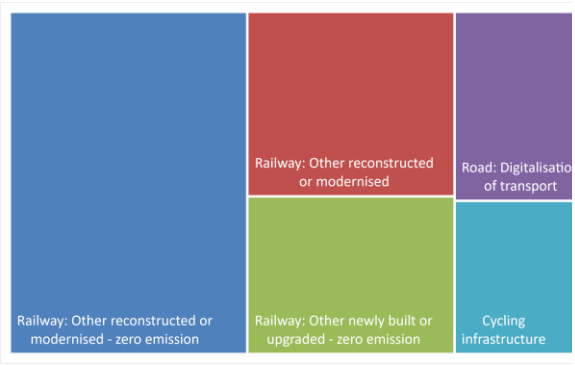
([12]) Intervention fields: 098 Railway: Other newly built or upgraded, 099 Railway: Other newly built or upgraded - zero emission, 102 Railway: Other reconstructed or modernised, 103 Railway: Other reconstructed or modernised - zero emission, 104 Railway: Digitalisation of transport

Figure 7 - Intervention fields with 10% or more of the IJG/ERDF allocation (RSO3.2)



Source: Consortium elaboration, based on Cohesion data '2021-2027 financial details'

Figure 8 - Intervention fields with 10% or more of the IJG/CF allocation (RSO3.2)



Source: Consortium elaboration, based on Cohesion data '2021-2027 financial details'

BOX 1 – Polish Infrastructure and Climate Programme

The Polish Infrastructure and Climate programme (around 30% of the total RSO3.1), acknowledges the challenges posed by the requirement to complete the TEN-T core network by 2030 for the national road infrastructure. Actions to complete construction of the basic transport network connecting the main economic centres in the country and neighbouring countries within the TEN-T network will be key. For this specific purpose are projects to construct and reconstruct roads in the national road network, supplementing missing elements of routes in the TEN-T core network. Support will also cover the implementation of intelligent transport systems on the road network and devices to improve road safety. The priorities in the railway sector will be to build the TEN-T core network by 2030, completing sections of railway lines, improving connections between the core network and networks of third countries, appropriate infrastructure for smooth and safe railway traffic and effective traffic management systems. Railway investments on the core network will include European Rail Traffic Management Systems (ERTMS) installations. To support freight traffic, projects to improve infrastructure in three freight corridors (North Sea-Baltic, Baltic-Adriatic, Amber) will be co-financed. Projects to eliminate bottlenecks to investments completed or planned for implementation, and projects that dramatically increase network capacity and to shortening travel times, with new and expanded connections to large railway junctions, agglomerations, administrative and economic centres and intermodal terminals, including intelligent transport systems and services.

BOX 2 - Investments in local mobility and transport, RSO2.8 and PO3

RSO2.8, within PO2, is also part of a wider strategy for transport at local and regional level also financed by PO3 investments. RSO2.8 supports light rail, metro and tramlines, walking and cycling friendly infrastructure, multimodal terminals/hubs, non-fossil fuel rolling-stock buses, and digital traffic management solutions. These investments are made on the basis of local strategies such as sustainable urban mobility plans. PO 3, and in particular RSO3.2, covers investments in climate resilient, intelligent and intermodal national, regional and local mobility. This RSO also promotes improvement in access for local and regional transport networks to TEN-T and cross-border mobility.

Complementary activities supported, as indicated by the Intervention fields selected by the programmes, are RSO3.2 supporting sustainable transport and RSO2.8 for sustainable urban mobility. While most of financial resources for RSO2.8 are planned under 'clean urban transport' (intervention fields 081, 082, 086), this represents only round 1% of investments in RSO3.2. Conversely, RSO3.2 investments are predominantly in road and railways infrastructure as illustrated in the PO3 fiche, while RSO2.8 only partially covers the category 'other railways' (not part of the TEN-T network).

1.5. Output

The table below summarises the main output indicators and their 2029 targets at PO3 level, RSO 3.1. This fiche presents information only on common output indicators and not programme-specific indicators. At EU level, more than 60% of the output indicators selected by the programmes in RSO3.1 are part of the common indicators, the value is 70% for RSO3.2.

	Unit	Target 2029
RCO43 - Length of new or upgraded roads - TEN-T	km	1 720
RCO45 - Length of roads reconstructed or modernised - TEN-T	km	540
RCO47 - Length of new or upgraded rail - TEN-T	km	1 059
RCO49 - Length of rail reconstructed or modernised - TEN-T	km	2 846

Source: Consortium elaboration, based on Cohesion data

RSO3.1 has two main categories of output indicators. One is linked to road investments, and one to rail. Both distinguish between new or upgraded infrastructure (to respect TEN-T standards) or the modernisation of existing infrastructure. Indicators RCO43 and RCO45 cover TEN-T roads (motorways and other classes).

The table below summarises the output indicators and 2029 targets at PO3 level, RSO 3.2.

	Unit	Target 2029
RCO44 - Length of new or upgraded roads - non-TEN-T	km	856
RCO46 - Length of roads reconstructed or modernised - non-TEN-T	km	5 124
RCO48 - Length of new or upgraded rail - non-TEN-T-	km	115
RCO50 - Length of rail reconstructed or modernised - non-TEN-T	km	1 783

Source: Consortium elaboration, based on Cohesion data

The main common indicators reflect planned actions at RSO level. RSO3.1 supports road and rail investments to complete TEN-T, while the main common output indicators under RSO3.2 reflect the same type of investments but for non-TEN-T transport infrastructure.

Other common output indicators and targets are presented below, including for territorial development, urban transport, multimodal transport, waterways and, to a lesser extent, support for firms and digitalisation.

Common output indicators	Target 2029	
	RSO3.1 Sustainable TEN-T	RSO3.2 Sustainable transport
Territorial development		
RCO74 Population covered in integrated territorial development		9 112 464
RCO75 Strategies for integrated territorial development		57
Output indicators related to urban transport		
RCO57 Urban Trans: rolling stock for public transport	38 032	48 628
RCO58 Urban Trans: Dedicated cycling infrastructure supported		1 341
RCO59 Urban Trans: Alternative fuels infrastructure	364	1 004
Roads and railways		
RCO53 Rail: New or modernised railway stations and stops	80	54
RCO109 Rail: Length of ERTMS equipped railways - TEN-T	1 549	
RCO108 Road: Length of roads with TMS (TEN-T)	284	
RCO110 Road: Length of roads with TMS (non-TEN-T)		86
RCO111 Rail: Length of ERTMS equipped railways (non-TEN-T)		66
Multimodal transport		
RCO54 Multimodal: New or modernised intermodal connections	67	134
Waterways		
RCO51 Waterways: Length of inland waterways - TEN-T	177	
RCO52 Waterways: Length of inland waterways- non-TEN-T		81

Support to firms and digitalisation	
RCO01 Firms: All firms	29
RCO04 Firms: Advised	19
RCO02 Firms: Grant aided	10
RCO14 Digital: Public institutions supported for Digital	5

Source: Consortium elaboration, based on Cohesion data

1.6. Results

The table below summarises the main result indicators and net targets at the PO3 level. RSO3.1 and RSO3.2 have the same main result indicators. At EU level, common results indicators represent more than 70% of the total indicators for RSO3.1 and around 65% for RSO3.2.

	Unit	Target 2029 RSO3.1	Target 2029 RSO3.2
RCR55 - Annual users of newly built, upgraded, reconstructed or modernised railways	passenger-km/year	16 491 939 148	5 284 038 660
RCR56 - Time savings due to improved road infrastructure	man-days/year	28 085 145	4 107 272
RCR58 - Rail Annual users railways	passenger-km/year	686 311 692	3 333 730 555
RCR59 - Rail: Freight transport on rail	man-days/year	2 757 053 653	379 254 065

Source: Consortium elaboration, based on Cohesion data

The two RSOs use the same main results indicators, related to increased passengers on roads and railways and the expected time savings for transport on improved road infrastructure. Another common result indicator refers to freight weight transported on newly constructed, upgraded, reconstructed and modernised railways due to the supported projects. The higher targets for RSO3.1 reflects the higher allocation for this RSO.

Other common result indicators are presented in the table below, these refer to climate and environmental objectives, waterways infrastructure and support to digitalisation.

Common result indicators	Target	
	RSO3.1 Sustainable TEN-T	RSO3.2 Sustainable transport
Roads and railways		
RCR101 Rail: Time savings due to improved infrastructures	807 232	136 563
Climate and environment		
RCR29 Climate: Estimated GHG emissions	-26 201	-16 168
RCR50 Env: Population benefiting from measures for air quality	1 042 863	706 100
Waterways		

RCO60 Waterways: Freight transport on inland waterways	714 590 014	13 119 490
Support to digitalisation		
RCR11 Digital: Users of new and upgraded public digital services		2 934

Source: Consortium elaboration, based on Cohesion data

1.7. Impacts

The expected impact of PO3 investments is still too early to assess, given the limited implementation (see section below). Two categories of analysis can nonetheless help estimate impacts: the contribution of planned interventions to the SDGs and climate, biodiversity, environmental and air quality tracking, as well as digital and gender equality tracking.

The planned contribution of investments to SDGs is a proxy for expected impacts of PO3 on the wider economy and society. The main contribution to SDGs from PO3 are to:

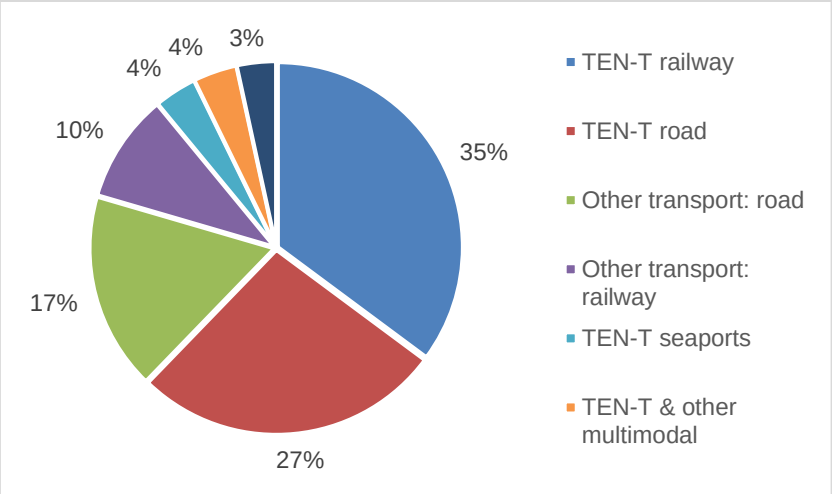
- SDG 9 Industry, innovation, infrastructure (EUR 38.9 billion)
- SDG 11 Sustainable cities and communities (EUR 696 million)
- SDG 13 Climate action (EUR 832 million)

To a lesser extent, the investments also contribute to:

- SDG 7 Affordable and clean energy (EUR 119 million)
- SDG 8 Decent work and economic growth (EUR 50 thousand)
- SDG 15 Life on land (EUR 62.5 million)

Analysis of intervention fields contributing to SDG9 reveals how most investments are linked to railways and roads, reflecting the investment intensity of the PO3. To a lesser extent, investments in seaport infrastructure and multimodal transport (both TEN-T and non-TEN-T) contribute to SDG9.

Figure 9 - SDG 9 Industry, innovation, infrastructure



Source: Consortium elaboration, based on Cohesion data '2021-2027 Financial details'

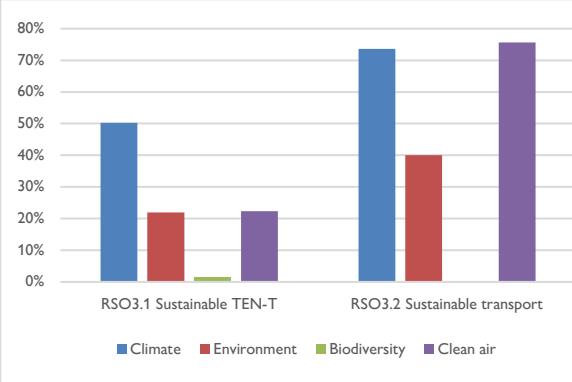
Other investment impacts can be tracked thanks to the categorisation of financial inputs. This enables an assessment of the planned contribution to climate and environment objectives, as well as biodiversity and air quality objectives ([13]) The analysis of RSO contributions shows the difference between the two. A higher percentage of investments under RSO3.2 contribute to climate, environmental, and clean air objectives; the opposite can be said for biodiversity, to which both RSOs contribute very little.

Lastly, the tracking extends to digital and gender equality objectives. Tracking digital expenditures in cohesion policy measures the expenditures contributing to the EU digital transition along the four digital dimensions ([14]) Around 2.5% of RSO 3.1 and RSO 3.2 resources contribute to digital transformation objectives, for a total amount of EUR 1.35 billion. Concerning gender equality, only 1% of all PO3 resources contribute to these objectives, almost all concentrated in RSO3.2.

([13]) CPR Annex 1

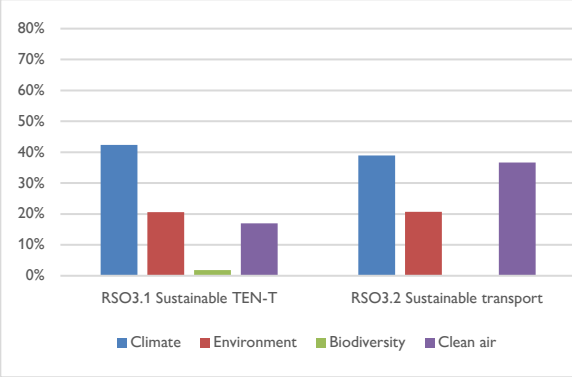
([14]) The four digital dimensions, in line with the EU Digital Compass are: Digital skills; Secure and sustainable digital infrastructure (investment in digital connectivity networks); Digital transformation of businesses (e-solutions and e-services in and for enterprises); Digitalisation of public services (e-services in public administration; E-health services)

Figure 10 - CF Contributions to climate, environmental, biodiversity and clean air objectives, by RSO



Source: Consortium elaboration, based on Cohesion data '2021-2027 Financial details', share of total allocation by RSO

Figure 11- ERDF Contributions to climate, environmental, biodiversity and clean air objectives, by RSO



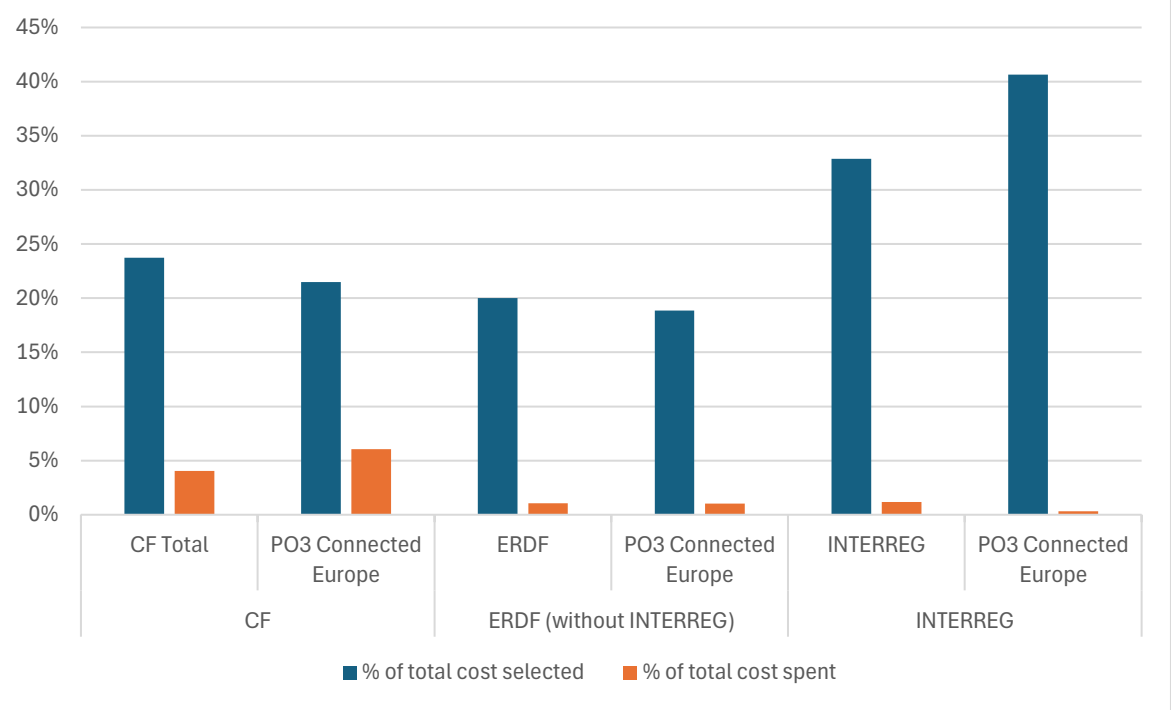
Source: Consortium elaboration, based on Cohesion data '2021-2027 Financial details', share of allocation by RSO

2. Part 2: Key evaluation findings from the implementation and lessons learnt

2.1. Current implementation progress

The financial progress of programmes for PO3 is limited, especially ERDF and Interreg programmes. Within PO3, EUR 3.8 billion for CF, EUR 4.1 billion for ERDF and EUR 226 million for Interreg have been decided. Notably, CF has the highest share of resources spent in PO3, with respect to other funds and other POs.

Figure 12 - Decided and spent value by fund (PO3 and total), share of total allocation



Source: Consortium elaboration, based on June 2024 data

As illustrated in the tables below, only a few common output indicators have been implemented under RSO3.1. Investments in TEN-T have seen some progress, notably RCO45 - Length of roads reconstructed or modernised (TEN-T) and RCO57- Urban Trans: rolling stock for public transport. Regarding decided values, the only indicator showing no progress is RCO47 - Length of new or upgraded rail (TEN-T), while the others have reached or surpassed their 2024 milestones.

Physical progress, main common output indicators RSO3.1:

	Unit	2029 target	2024 milestone	Decided (% of milestone by 2024)	Implemented (% of milestone by 2024)
RCO43 - Length of new or upgraded roads - TEN-T	km	1 690	256	92%	4%
RCO45 - Length of roads reconstructed or modernised - TEN-T	km	540	141	32%	10%
RCO47 - Length of new or upgraded rail - TEN-T	km	1 059	52	0%	0%
RCO49 - Length of rail reconstructed or modernised - TEN-T	km	2 707	61	576%	0%
RCO54 Multimodal: New or modernised intermodal connections		67	11	127%	0%
RCO57 Urban Trans: rolling stock for public transport		38 032	25 032	100%	100%

Source: Consortium elaboration, based on July 2024 data

Common output indicators referred to as RSO3.2 show almost no implementation in June 2024. Physical progress, main common output indicators RSO3.2:

	Unit	2029 target	2024 milestone	Decided (% of milestone 2024)	Implemented (% of milestone 2024)
RCO44 - Length of new or upgraded roads - non-TEN-T	km	734	19.5	458%	0%
RCO46 - Length of roads reconstructed or modernised - non-TEN-T	km	4 844	276	246%	2%
RCO48 - Length of new or upgraded rail - non-TEN-T-	km	181	14	54%	0%
RCO50 - Length of rail reconstructed or modernised - non-TEN-T	km	1 951	52	59%	0%

Source: Consortium elaboration, based on June 2024 data

The following table presents physical progress referred to common result indicators for PO3. Indicators referring to railways and road infrastructures show progress regarding decided values, while other indicators linked to digital, climate, environment and waterways infrastructures present no progress.

Physical progress, common result indicators, PO3

	2029 target	Decided value	Decided progress
RCR101 Rail: Time savings due to improved infrastructures	943 795	36 327	3.85%
RCR11 Digital: Users of new and upgraded public digital services	2 934	0	0.0%
RCR29 Climate: Estimated GHG emissions	-42 369	0	0.0%
RCR50 Env: Population benefiting from measures for air quality	1 748 963	0	0.0%
RCR55 Road: Annual users of roads	20 174 334 182	2 487 612 807	12.3%
RCR56 Road: Time savings due to improved road infrastructures	31 501 017	1 810 633	5.7%
RCR58 Rail Annual users railways	3 998 602 247	106 711 620	2.7%
RCR59 Rail: Freight transport on rail	3 136 307 718	1 181 663 241	37.7%
RCR60 Waterways: Freight transport on inland waterways	727 709 504	0	0.0%

Source: Consortium elaboration, based on June 2024 data

2.2. Emerging challenges and EU citizen needs

An interesting aspect is the use of territorial tools and place-based approaches. At EU level, few programmes have planned the use of territorial tools within PO3 investments, ten of which are integrated territorial investments (ITI), while no investments are planned with CLLD. Through ITI, investments are directed to urban areas and rural sparsely populated territories. For example, the regional Polish programme Małopolska RSO3.2 will be partially implemented through ITI and Other Territorial Instruments.

Analysis of partnership agreements and programme documents provides insights into the relevance of PO3 in addressing emerging challenges and territorial disparities in accessing public services. Very few programmes refer to emerging demographic challenges with respect to PO3 as they are either outermost or northerly sparsely populated regions (French Réunion and Upper Norrland in Sweden). According to the Swedish regional programme, most of the challenges within PO3 are connected to the region's sparse population and long distances to cover, exacerbated by depopulation. Around half of the programme documents, at PO and RSO levels, note the importance of PO3 for reducing territorial disparities in accessing public services (education, transport, health, digital), but very few cite rural areas.

2.3. Coherence with other funds and alignment with the European Semester process

According to the analysis of programmes and partnership agreements, two main EU funding instruments complement the cohesion policy funds within PO3: the Connecting Europe Facility (CEF) and RRF. In the transport sector, CEF supports the development and modernisation of infrastructure on the Core and Comprehensive Network of the TEN-T, focusing on cross-border projects ([15]). The programming documents often describe this fund's complementarity with PO3 objectives. Both the ERDF/Cohesion Fund and CEF can finance TEN-T projects, demonstrating important synergies, with but CEF-Transport mainly focusing on cross-border investments and missing links for transit traffic, while Cohesion policy funds also targets national transport sections as well as access to TEN-T, as well as regional and local connectivity priorities. For example, the preparation of a project could be financed under cohesion policy, but then construction would start under CEF, and vice versa. cohesion policy can also allow for realising TEN-T (and other) projects over two programming periods (phasing) if needed. The same beneficial

([15]) Regulation (EU) 2021/1153 of 7 July 2021 establishing the Connecting Europe Facility and repealing Regulations (EU) No 1316/2013 and (EU) No 283/2014, Art. 9 – Eligible actions

complementarity can also be demonstrated between Cohesion policy funds' and CEF investments in TEN-T energy and digital networks.

The cohesion policy funds under PO3 and RRF share the common goals of developing and enhancing climate resilient, intelligent, secure, sustainable and intermodal national, regional and local mobility. RRPs address these objectives through operations planned within the green transition and digital transition pillars. In the plans, the interventions financed by the two funds are often demarcated ([16]). For example, in Lithuania, cohesion policy funds sustainable mobility measures for 18 major cities and resorts that have already adopted Sustainable Urban Mobility Plans (SUMPs) in the framework of the Operational Programme for the EU fund investments 2014-2020. For two cities, whose SUMPs were not financed by the funds of 2014-2020, sustainable mobility measures are funded through the RRF. Estonia provides a similar example, as the investment cost for bicycles and/or footpaths for local governments outside the larger urban areas (Tallinn, Tartu and Pärnu) will be financed by EUR 5 million under the RRF. An additional investment of EUR 20 million under PO3 will be added to this from CF and local governments. The RRF will be employed first, and the CF budget utilised after that. Double funding and the double counting of indicators are excluded at the project level.

Other funds are coherent with cohesion policy within PO3, especially TSI, CAP, HE, DEP and InvestEU which are cited for investments in digitalising infrastructure.

As regards alignment with European Semester priorities: At the financial level, the alignment of 2019 Annex D Country Report investment needs and planned intervention by the programmes reveals strong alignment for PO3-related investments. Programmes cover 85% of the investment needs. Moreover, between 2019 and 2022, all Member States had at least one transport-related CSR. The number of recommendations in PO3-related investments and reforms increased from 2019 to 2020 but decreased in 2022, due to the specific focus of the 2022 European Semester cycle on the COVID-19 pandemic and the consequences of the Russia's war on Ukraine. Nonetheless, according to the analysis of partnership agreements and programme documents, 2019 Annex D Country Reports and CSRs are consistently less cited as identifying investment needs related to PO3, compared to other POs. Some partnership agreements, such as the Latvian one, specify the alignment with the recommendation: '*CSR emphasises investments in sustainable transport infrastructure - the infrastructure in Riga and its surroundings should be improved, which would promote the mobility of the labour force and help limit the increasing energy consumption of passenger cars. [...] Railway transport is one of the safest and most environmentally friendly forms of land transport for both passengers and cargo. Therefore, investments in the development of railway infrastructure should primarily be continued in order to improve the competitiveness*

([16]) Study commissioned by DG REGIO (EC, 2024), Strategic coordination and financial complementarity of CPR Funds with other EU Instruments, Final Report and External support study to the mid-term evaluation of RRF – Case study on the functioning of the RRF and other EU funds.

of public transport compared to road transport, respecting CSR regarding the transition from cars to public transport.'

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