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Valutazione tematica degli interventi per le imprese del settore turistico e le imprese culturali finanziati dal PR Veneto FESR 2021-2027

Rapporto Finale

SINTESI INGLESE

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Executive summary (English version)

Objectives of the report - This report concerns the thematic evaluation of interventions targeting tourism enterprises and cultural enterprises financed by the Veneto ERDF Regional Programme 2021–2027 (hereinafter referred to as ERDF RP). Firstly, **the thematic evaluation reviews the programming framework**, examining the capacity of ERDF RP interventions to address the needs of the territory (*relevance*) and their alignment with existing regional strategies and programmes (*coherence*). Secondly, the evaluation **analyses** the *effectiveness* – albeit still based on preliminary or short-term evidence – **of interventions expected to be completed by 2024**, as well as their *added value*. Moreover, the evaluation also examines the *coherence* of interventions financed under the ERDF RP with others, in particular the European Social Fund Plus (ESF+) calls 'Cultura in rete' (Regional Government Decision – DGR 1643/2022) and 'Competenze per il Turismo' (DGR 1645/2022), whose projects target workers in the sector.

Context of the interventions for cultural and tourism enterprises – **Cultural and tourism enterprises represent an important and dynamic component of Veneto's economy**. With 73.5 million overnight stays in 2024 (21.8 million arrivals), the tourism sector in Veneto includes 3,099 hotels offering 21,246 beds and constitutes a key area for innovation and competitiveness among Small and Medium-sized Enterprises (SMEs). According to Istat data, **the Veneto region recorded the highest number of tourist overnight stays in Italy in 2023 and displays a highly heterogeneous situation**. In 2021, the tourism rate—defined as the total number of overnight stays in all accommodation establishments per inhabitant—reached a value of 32.2 in the Province of Venice and 1.6 in the Province of Treviso. The Bank of Italy's annual report on *The Economy of Veneto* (2024) highlights the increase in passenger traffic at Veneto airports compared with 2023, as well as the growth of the cruise sector.

According to the 2024 edition of the *"Io sono cultura"* annual report published by Unioncamere and the Symbola Foundation, **the cultural and creative system of Veneto has an estimated turnover of approximately EUR 9.4 billion, representing 9% of the sector at national level and 5.3% of Veneto's overall economy**. It is worth noting that non-profit activities account for 9.5% of the organisations operating in this sector (a figure lower than the national average of 11.3%), which indicates the prevalence of entrepreneurial activities. According to Istat data, enterprises **in the cultural and creative sectors play a central role in the regional economic context, representing—compared to the rest of Italy and the North-East—a higher share of added value, employment, and local units over the 2015–2022 period.**

In this context, **the Veneto Region has recognised the culture and tourism sectors as strategic for sustainable economic growth, the creation of new employment, territorial development and competitiveness, and the enhancement of human capital**. Accordingly, the ERDF RP contributes to these sectors through several priorities. Priority 1 invests in research, innovation, and digitalisation capacities and supports the sustainable growth and competitiveness of Veneto's SMEs. Priority 2 supports the energy efficiency of public buildings, including those of cultural interest (Action 2.1.1); Priority 3 focuses on cycle routes aimed at improving the connection between places of cultural interest; Priority 4 allocates resources to UNESCO Sites (Action 4.6.1) and promotes the cultural value of project proposals within interventions on educational and training infrastructure (Action 4.2.1); and Priority 5 supports relevant sectors, particularly the cultural one, also through urban regeneration initiatives.

This report focuses exclusively on **Priority 1 interventions**, as these relate specifically to enterprises. These interventions concern three **Specific Objectives** defined in Article 3 of Regulation (EU) 2021/1058 (hereinafter referred to as the *ERDF Regulation*[2]):

- 1.1 “Developing and enhancing research and innovation capacities and the uptake of advanced technologies”;
- 1.2 “Reaping the benefits of digitisation for citizens, companies, research organisations and public authorities”; and
- 1.3 “Enhancing sustainable growth and competitiveness of SMEs and job creation in SMEs, including by productive investments.”

Based on the *Methodological Document on Indicators* (2022), which reconstructs the programme intervention logic as defined in the programming phase before implementation started, **it is possible to estimate that approximately EUR 100 million of the ERDF RP actions directly contribute to the development of cultural and tourism enterprises**, corresponding to about 9.7% of the total Programme resources. More specifically, under Specific Objective 1.2, EUR 10 million are foreseen for the digitalisation of enterprises in the cultural sector (Action 1.2.5) and for the *Smart Tourism Destination* call (Action 1.2.4). The remaining EUR 90 million planned under the ERDF RP concern: the consolidation of cultural enterprises (Action 1.3.11 sub A), new cultural enterprises (Action 1.3.11 sub B), the short- and feature-film sector (Action 1.3.11 sub C), investments in accommodation facilities (Action 1.3.8), *product clubs* (Action 1.3.9), and aggregations for tourism promotion (Action 1.3.10 sub A).

Although information on the rankings and selected beneficiaries of the most recent calls is not yet available—thus making it impossible to formulate a conclusive judgement—based on the implementation data of the ERDF RP as of June 2025, **it appears that the Programme has already mobilised approximately EUR 100.2 million for cultural and tourism enterprises**.

- **The ERDF RP has already mobilised about EUR 96.7 million**, that is, almost the entirety of the resources expected to have a direct contribution to cultural and tourism enterprises, through calls under **Specific Objective 1.2** and **Actions 1.3.8, 1.3.9, and 1.3.10 (sub A)**.
- **Furthermore, the implementation analysis indicates that the contribution of the ERDF RP to the development of cultural and tourism enterprises has also come from additional calls under Specific Objectives 1.1 and 1.3, amounting to approximately EUR 3.5 million**. Specific Objective 1.1 allocated EUR 2.5 million within the S3 domain *“Culture and Creativity and Regional Innovation Networks (RIN)”* through Action 1.1.1 A. Specific Objective 1.3 invested EUR 1 million at the end of 2024 in a call supporting the participation of enterprises in the tourism value chain and/or those contributing to the definition of Veneto’s tourism product in trade fairs (Action 1.3.10 sub B).

It should also be recalled that, under Action 1.2.5, the launch of an additional call of approximately EUR 5 million is planned by 2025 for digitalisation initiatives in the cultural sector implemented by private entities. This call is expected to commit all the resources initially foreseen for Action 1.2.5.

For the evaluation of **effects**, this report refers exclusively to the calls of projects which are expected to be completed by 2024, namely: DGR 406/2023 (Action 1.3.8), which financed interventions for mountain and non-mountain tourism; DGR 459/2023 (Action 1.3.9), which supported the aggregation of tourism enterprises within product clubs; DGR 491/2023 (Action 1.3.10), which supported tourism promotion aggregations targeting international markets; and DGR 339/2023, which supported

[2] This Regulation also concerns the Cohesion Fund, which, however, does not apply to Veneto or to Italy; therefore, for the sake of simplicity, it is referred to in this context as the *ERDF Regulation*.

cultural, creative, and audiovisual enterprises financed under Action 1.3.11 (sub A), whose allocation was further strengthened through DGR 1515/2023.

Methodological approach - **The report draws on various primary and secondary sources, adopting a theory-based evaluation approach to assess the effects of the interventions**.

Primary sources consist of data and information collected directly by the evaluator, based on **semi-structured interviews** with key informants and a **survey of beneficiaries** of the interventions subject to the effects analysis. The main **secondary sources** include: the **monitoring system**; **statistical and contextual data sources** (e.g. Federated Veneto Regional Tourism Observatory, ISTAT, Eurostat, the Statistical Office of the Veneto Region, Bank of Italy, and the European Commission's Cohesion Open Data Platform); and **regional strategic and programming documents** (e.g. ERDF RP, regional programming documents for culture and tourism, annual plans for tourism and culture, the Methodological Document on the Definition of Selection Criteria for Operations approved by the Monitoring Committee, the Methodological Document on Indicators, and the Veneto Smart Specialisation Strategy). **Documentation on operational implementation aspects** was also used, including decrees and regulations governing calls, rankings, information on project proposal scores, and detailed data on a sample of projects. **This evaluation refers to information available from secondary sources as of the end of June 2025**.

The evaluation employs various methods and analytical techniques, including: the **logical framework method**; **implementation analysis** (also making use of mapping tools); **qualitative and quantitative analysis** of the survey and interviews; and the **analysis of context indicators**.

Conclusions and lessons learned concern:

- the review of the programming framework, namely the correspondence between the ERDF RP interventions and the needs of enterprises (*relevance*) and their alignment with the regional strategic framework (*coherence*);
- the evaluation of the effectiveness and added value of the ERDF interventions, also taking into account the contribution arising from their combination with the ESF+.

ERDF RP interventions and enterprise needs (Relevance)

Conclusions – **The various evaluation sources** (interviews with beneficiaries, representatives of sectoral operators, representatives of the structures responsible for implementation within the Veneto Region, and the beneficiary survey) **are consistent in confirming the capacity of the ERDF RP interventions to adequately address the needs of cultural and tourism enterprises**. Indeed, the design of the interventions took into account the lessons learned from the pandemic period and from the previous programming cycle. Furthermore, the interventions demonstrate the regional decision-maker's ability to balance different needs — for example, in the tourism sector, improving the performance of operators while also ensuring the de-seasonalisation and geographical redistribution of tourist flows, including marginal areas such as mountain municipalities and inner areas. For the cultural sector, the need emerges to promote public–private partnerships and to integrate different sectors, starting with the tourism sector itself. These issues are of importance for the ERDF RP and are strategic for the future.

Lessons learned – Based on the stakeholder consultation conducted for this evaluation, **increasing importance is being placed on support for digital transformation, environmental and energy transition, and accessibility for persons with disabilities**. This could be reflected both in ERDF investments and in training activities, for which the evaluation survey highlights the need to focus on the challenges of digitalisation and new technologies, as well as on communication, language, hospitality and customer relations skills.

Coherence with the regional strategic framework

Conclusions – **The ERDF RP interventions for cultural and tourism enterprises are coherent both with one another and with the regional policy framework, as they are anchored in the existing sectoral legislation, share a strong common orientation towards innovation and the Veneto Smart Specialisation Strategy, and support — in various ways, both formal and informal — the development of networks, aggregations, and partnerships.**

Lessons learned – Drawing on the experience of the calls analysed in this evaluation, **support for youth entrepreneurship could be further explored within projects aimed at promotion and the creation of networks and partnerships**. **This would be in line with the regional sectoral legislation** (Regional Law 17/2019 for culture and Regional Law 11/2013 for tourism). A similar approach could also be considered for female entrepreneurship, in line with the application of the horizontal principle of equality between women and men (Article 9 of Regulation (EU) 2021/1060).

Data collection from the monitoring system could be organised and subsequently used to estimate, at least in some cases, the impact of interventions on climate change mitigation. Indeed, the calls reward improvements in environmental performance and, in the case of Action 1.3.8, the ERDF RP support was even instrumental in enabling a change in energy-efficiency class.

As emerged from the implementation analysis, the first calls under **Actions 1.3.9 and 1.3.10** did not reach a sufficient number of selected operations to commit all the allocated resources. This was mainly due to the fact that the launch of the ERDF RP coincided with the closure of the previous programming period. However, it should also be noted that the demand for support for projects carried out individually by enterprises (Action 1.3.8 and Action 1.3.11 sub A) was significantly higher than the resources available under the calls. From this perspective, **it is recommended to closely monitor the progress of future calls to ensure an appropriate balance between the spending needs and the regional strategic priorities.**

Effectiveness and added value of the interventions

Conclusions – **The calls launched under the ERDF RP have generated significant impacts on innovation, digitalisation, environmental sustainability, accessibility, and the enhancement of cultural and tourism heritage.**

Enterprises supported under Actions 1.3.8 and 1.3.11 have primarily introduced product innovations and new promotional techniques, while those supported under Action 1.3.10 have implemented more cross-cutting innovations, involving processes, organisation, and marketing. Around half of the beneficiaries consider that such innovations would not have been achieved without ERDF support, thus highlighting the added value of the funding; moreover, over 70% of enterprises supported under Action 1.3.8 report a significant contribution to digital transformation.

Among the calls analysed, Action 1.3.8, targeting tourism enterprises, is the only one to include specific interventions related to environmental sustainability and energy efficiency. However, all calls promote the protection of environmental quality and reward the possession of environmental certifications. The same Action also supported accessibility measures, improving the usability of facilities for people with motor disabilities.

Overall, the projects have contributed to the enhancement of cultural and tourism heritage: cultural calls have mainly influenced the promotion of the regional cultural heritage, while tourism calls have supported an increase in visitors and the de-seasonalisation of tourist flows, with more than half of participants reporting highly or fairly significant effects. Access to new markets has been particularly significant for Action 1.3.10, where 50% of enterprises strengthened their presence in national and foreign markets.

Some interviews with beneficiaries reveal a consolidation of business networks—particularly supported through Actions 1.3.9 and 1.3.10—consistent with the reward criteria established by the calls. **Nevertheless, the direct link between ERDF investments and these results appears less immediate than for other objectives, such as innovation or digital transformation**, partly because many collaborations had already been initiated during the previous programming period. It may also still be too early to fully capture the effects of the new investments on business networks and cooperation.

Although the impacts on economic competitiveness are expected to materialise mainly in the medium to long term, enterprises already report increases in productivity and turnover, while the effects on employment appear more limited.

Lessons learned – **The intervention logic of the calls selected for the effects analysis has been respected, and the expected results are largely confirmed**. The evaluation also identified additional elements concerning the effectiveness of the interventions that are not directly measured through output and result indicators but are clear within the intervention logic of the calls. These include support for energy transition and environmental sustainability, cultural and tourism promotion of the regional heritage, promotion of accessibility, and forms of cooperation among enterprises.

Combination between the ERDF and other funds, in particular the ESF+

Conclusions – **The ESF+ calls benefiting cultural and tourism enterprises show different forms of integration with the ERDF: financial integration**, as in the case of the *"Cultura in rete"* call, which included ERDF expenditure; **and non-financial integration**, as in both the *"Cultura in rete"* and *"Competenze per la transizione verso nuovi modelli di sviluppo turistico"* calls, which applied evaluation criteria consistent with the Smart Specialisation Strategy.

The two calls under the ESF+ RP (*"Cultura in rete"* and *"Competenze per la transizione verso nuovi modelli di sviluppo turistico"*) involved workers from approximately **17% of the 329 enterprises that received ERDF funding under Action 1.3.8 (DGR 406/2023), Action 1.3.9 (DGR 459/2023), Action 1.3.10 (sub A) (DGR 491/2023), and Action 1.3.11 (sub A) (DGR 339/2023). The results of the survey conducted among ERDF RP beneficiaries are generally positive regarding the contribution of ESF+ interventions to the improvement of skills.** Despite the provisions of the regional strategic framework, **the decision to combine ESF+ and ERDF resources follows a bottom-up approach, largely depending on the capacity and interest of the actors involved, particularly enterprises.**

Lessons learned **– With a view to the second phase of the current programming period and especially to the 2028–2034 period, it could be useful to clarify the opportunities for combination and coordination of resources, as well as the respective areas of demarcation between the Funds**. Fund integration may concern not only the ESF+ and ERDF, but also the European Agricultural Fund for Rural Development (EAFRD) and the Common Agricultural Policy, which support the primary sector, the agri-food processing sector, and complementary measures in tourism and culture. Moreover, in the tourism sector, Local Action Groups (LAGs) play a key role in the governance of rural development; however, they do not necessarily identify Destination Management Organisations (DMOs) as their natural counterparts. Greater coordination in this respect would ensure higher efficiency of public intervention in the future.

The consultation of stakeholders during the evaluation activity highlighted the **importance of clarifying the operational aspects of opportunities stemming from the ESF+ for enterprises, which normally have access to the ERDF**. In this regard, it seems important to strengthen communication activities concerning both current and future opportunities.



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