

# ERDF, Cohesion Fund and ESF categorisation 2021+



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*#EUinmyRegion*  
*#ESIFOpenData*

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# Categorisation of expenditure

- Objective: ensure reliable and comparable monitoring data
- Used for: reporting, policy analysis, evaluation
- Calculation of contribution to climate change objectives and environmental objectives
- Not an accounting system
- 2014-2020: defined in an Implementing Act
- 2021-2027: Annex I of CPR

# Dimensions

2014-2020 dimensions	2021-2027 dimensions
Intervention field	Intervention field
Form of finance	Form of finance
Territorial dimension	Territorial delivery mechanism and territorial focus
Territorial delivery mechanism	
Thematic objective	-
ESF secondary theme	ESF secondary theme
Economic activity	Economic activity
Location	Location
	Macro-regional and sea basin strategies

# Reporting

- In OP: indicative breakdown of the programme resources
- During implementation: bi-monthly reporting of financial data on **operations selected** and **expenditure declared by beneficiaries**
- Categorisation data reported under each priority axis **by specific objective** to ensure transparency (similarly to reporting by TO in 2014-2020)
- Availability of monitoring data by specific objective is fundamental

# Intervention field dimension

- Grouped by policy objective for presentation purposes – all intervention fields may be used under all policy objectives
- Fields marginally used were eliminated or merged
- Fields were split and new fields were added to capture major investment areas better
- Wording was adjusted to reflect the scope of the specific objectives
- Climate tracking weights were adjusted
- Environment tracking weights were added

**TABLE 1: CODES FOR THE INTERVENTION FIELD DIMENSION**

INTERVENTION FIELD		Coefficient for the calculation of support to climate change objectives	Coefficient for the calculation of support to environmental objectives
<b>POLICY OBJECTIVE 1: A SMARTER EUROPE BY PROMOTING INNOVATIVE AND SMART ECONOMIC TRANSFORMATION</b>			
001	Investment in fixed assets in micro enterprises directly linked to research and innovation activities	0 %	0 %
002	Investment in fixed assets in small and medium-sized enterprises (including private research centres) directly linked to research and innovation activities	0 %	0 %
003	Investment in fixed assets in public research centres and higher education directly linked to research and innovation activities	0 %	0 %
004	Investment in intangible assets in micro enterprises directly linked to research and innovation activities	0 %	0 %
005	Investment in intangible assets in small and medium-sized enterprises (including private research centres) directly linked to research and innovation activities	0 %	0 %
006	Investment in intangible assets in public research centres and higher education directly linked to research and innovation activities	0 %	0 %
007	Research and innovation activities in micro enterprises including networking (industrial research, experimental development, feasibility studies)	0 %	0 %
008	Research and innovation activities in small and medium-sized enterprises, including networking	0 %	0 %
009	Research and innovation activities in public research centres, higher education and centres of competence including networking (industrial research, experimental development, feasibility studies)	0 %	0 %
010	Digitizing SMEs (including e-Commerce, e-Business and networked business processes, digital innovation hubs, living labs, web entrepreneurs and ICT start-ups, B2B)	0 %	0 %
011	Government ICT solutions, e-services, applications	0 %	0 %
012	IT services and applications for digital skills and digital inclusion	0 %	0 %
013	e-Health services and applications (including e-Care, Internet of Things for physical activity and ambient assisted living)	0 %	0 %
014	Business infrastructure for SMEs (including industrial parks and sites)	0 %	0 %
015	SME business development and internationalisation	0 %	0 %
016	Skills development for smart specialisation, industrial transition and entrepreneurship	0%	0%
017	Advanced support services for SMEs and groups of SMEs (including management, marketing and design services)	0 %	0 %
018	Incubation, support to spin offs and spin outs and start ups	0 %	0 %
019	Innovation cluster support and business networks primarily benefiting SMEs	0 %	0 %
020	Innovation processes in SMEs (process, organisational, marketing, co-creation, user and demand driven innovation)	0 %	0 %

# Territorial delivery mechanism and territorial focus dimension

- Combination of two dimensions from the 2014-2020 categorisation system
- OPs must set out the specific territories targeted (Territorial dimension) and the planned use of integrated territorial instruments (Territorial delivery mechanism dimension)
- Territorial delivery mechanism: covers the instruments mentioned by the CPR (ITI, CLLD, other national territorial tool)
- Territorial focus: does not follow strictly statistical definitions but leaves definition to MS



<b>TERRITORIAL DELIVERY MECHANISM AND TERRITORIAL FOCUS</b>		
<b>INTEGRATED TERRITORIAL INVESTMENT (ITI)</b>		ITI focused on sustainable urban development
11	Urban neighbourhoods	x
12	Cities, towns and suburbs	x
13	Functional urban areas	x
14	Mountainous areas	
15	Islands and coastal areas	
16	Sparsely populated areas	
17	Other types of territories targeted	
<b>COMMUNITY LED LOCAL DEVELOPMENT (CLLD)</b>		CLLD focused on sustainable urban development
21	Urban neighbourhoods	x
22	Cities, towns and suburbs	x
23	Functional urban areas	x
24	Mountainous areas	
25	Islands and coastal areas	
26	Sparsely populated areas	
27	Other types of territories targeted	
<b>OTHER TYPE OF TERRITORIAL TOOL UNDER POLICY OBJECTIVE 5</b>		Other type of territorial tool focused on sustainable urban development
31	Urban neighbourhoods	x