



fi-compass event series
Thematic workshops on ESI Funds financial instruments

Financial instruments for energy efficiency in the programming period 2014-2020

Vienna, Thursday, 20 October 2016

Programme



Background of event

The first ESI Funds financial instruments in the 2014-2020 programming period are starting implementation and can form a source of inspiration and basis of discussion for practitioners.

fi-compass provides new learning opportunities for those directly involved in the design, set-up and implementation of financial instruments through its new series of *fi-compass* workshops on ESI Funds financial instruments to support specific thematic objectives and sectors.

The first regional thematic *fi-compass* workshop on 20 October 2016 in Vienna, Austria will address financial instruments related to the Thematic Objective 4 'Low carbon economy' (TO4) in the programming period 2014-2020.



Objectives / Methodology

The purpose of the workshop is to:

- Provide participants with an opportunity to learn from experience of other Member States and regions in implementing financial instruments to support the Thematic Objective 4 'Low carbon economy' in the programming period 2014-2020;
- Create a forum for participants to share their own experience and progress in implementing a low carbon economy financial instrument;
- Enable participants to exchange on a *peer-to-peer* basis with the speakers and other participants on how to deal with technical challenges they are facing at the moment regarding the design, set-up and implementation of a low carbon economy financial instrument.

Methodology of the workshop

During the workshop, national representatives from managing authorities, financial intermediaries as well as European Investment Bank (EIB) experts will take participants through the different phases of the life cycle of designing and implementing a low carbon economy financial instrument, based on two specific case studies:

- JESSICA II in Lithuania for the renovation of multi-apartment buildings in the 2014-2020 Operational Programme, and
- ESIF/EFSI Regional Investment Platform financing projects for the Third Industrial Revolution in Region Hauts-de-France (France).

The event will consist of:

- Presentations by experts from the managing authorities, financial intermediaries as well as EIB experts;
- Question and answer sessions and peer-to-peer discussions following each of the case study sessions; and
- Networking opportunities with speakers and participants.



Audience

This full-day practical workshop has been designed especially for managing authorities and financial intermediaries from all Member States who are directly involved or plan to be involved in the design, set-up and implementation of financial instruments related to the Thematic Objective 4 'Low carbon economy' in the programming period 2014-2020. Other directly involved stakeholders, such as housing associations, are also welcome to participate in the event.

Venue

Sofitel Vienna
Praterstrasse 1
1020 Vienna

> [How to get here](#)

Language

The event will take place in English.

Interpretation between English and French will be provided.

Registration

Online registrations for this event will close on Friday, 14 October 2016.

[Click here to register to this event](#)

After registering online through the www.fi-compass.eu website, registrants will receive an automatic email acknowledging receipt of their registration. This message is not a confirmation of participation. Within two weeks after application the registrants will be informed by a separate email whether or not they can attend the event. The decision will be based on available seats, targeted audience and balanced representation of Member States and organisations.

Costs

Registration is free. Participants are expected to finance their own travel and accommodation costs. In case of unforeseen circumstances such as force majeure or low participant numbers, the event might be moved to a different date or cancelled. In this case, registered participants will be informed immediately via email. The reimbursement of travel and accommodation expenses or work hours lost will not be possible.



Agenda

Vienna, 20 October 2016 (Thursday)

Venue: Sofitel Vienna, Praterstrasse 1, 1020 Vienna, Austria

Moderator: Pieter Coppens, European Investment Bank

9:30 – 10:00 Registration and coffee

10:00 – 10:05 **Welcome**

Pieter Coppens, European Investment Bank

10:05 – 11:30 **ESIF/EFSI Regional Investment Platform financing projects for the Third Industrial Revolution in Region Hauts-de-France, France**

Philippe Farvacque, Région Hauts-de-France, France

Alain Kauffmann, European Investment Bank

Guillaume Thomé, Finorpa and **Julien Watry**, Nord Capital Partenaires, France

Representatives of the Managing Authority (Region Hauts-de-France, France) and of the selected financial intermediary, as well as the European Investment Bank who were directly involved in establishing the ESIF/EFSI Regional Investment Platform will provide participants with hands-on insights from the process of designing, setting up and implementing the Investment Platform, analysing the essential practical aspects and key challenges. The speakers will also explain how ESIF and EFSI resources can be combined in such a financial instrument and what opportunities the Investment Platform offers to support Thematic Objective 4 'Low Carbon Economy' (TO4).

11:30 – 12:30 **Q&A and peer-to-peer discussion**

Facilitated by **Emily Smith**, European Investment Bank

On the basis of the case study from the Hauts-de-France Region, participants will have the opportunity to discuss questions with the speakers regarding the Investment Platform and to exchange with other peers participating in the seminar on their state of play, practical experiences and/or plans to launch financial instruments supporting the low carbon economy.

12:30 – 14:00 **Lunch break with networking opportunity**

14:00 – 15:00 **JESSICA II in Lithuania in the 2014-2020 Operational Programme**

Agnė Kazlauskaitė, Ministry of Finance, Lithuania

Junona Bumelytė, European Investment Bank

Representatives from the Managing Authority and the European Investment Bank who were directly involved in setting up JESSICA II in Lithuania will describe the process of designing, setting up and implementing the financial instrument. The presentations will cover the delivery architecture of JESSICA II, the key steps undertaken and lessons learnt from launching a low carbon focussed financial instrument in the 2014-2020 programming period.

15:00 – 15:50 **Q&A and peer-to-peer discussion**

Facilitated by **Emily Smith**, European Investment Bank

On the basis of the case study from Lithuania, participants will have the opportunity to discuss with the speakers and other peers participating in the seminar the opportunities and challenges of implementing financial instruments for energy efficiency in housing and public buildings in the 2014-2020 programming period and to continue the peer-to-peer exchange on their own experiences and/or plans to implement low carbon focussed financial instruments in their Member State or region.

15:50 – 16:00 **Final remarks**

Pieter Coppens, European Investment Bank

fi-compass event series

Thematic workshops on ESI Funds financial instruments

In autumn 2016, *fi-compass* started a new series of events dedicated to financial instruments supporting specific thematic objectives in the programming period 2014-2020.

These workshops share the experience of managing authorities, financial intermediaries and final recipients and take participants through the different phases of the life cycle of designing and implementing a thematic/ sector focused financial instrument and allow for direct interaction between participants:

- Managing authorities' representatives showcase their experiences in establishing the financial instrument and their considerations when undertaking the ex-ante assessment, designing the financial instrument, engaging with other funders/ investors and running the financial intermediary selection process. Public procurement and State aid challenges, where applicable, may be particularly interesting to highlight in this regard;
- Financial intermediaries give their feedback/ share their experiences in 'bidding' for the management of the financial instrument, and securing co-financing as appropriate. They might also set out their experiences and challenges in targeting and assisting potential final recipients in preparing their projects for financing, mobilising technical support, grant and/or other resources to fund the projects;
- Where possible, final recipients elaborate on the benefits they saw in obtaining financing from the financial instrument, how this helped catalyse their project, as well as the challenges experienced in meeting collateral, reporting and monitoring requirements required by the financial intermediary.

We invite stakeholders directly involved or planning to become involved in the implementation of financial instruments supporting specific thematic objectives to stay in touch with *fi-compass* and attend our upcoming thematic events.

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