



Financial instruments under the ESF: State of play as of end 2021

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 #ficompass



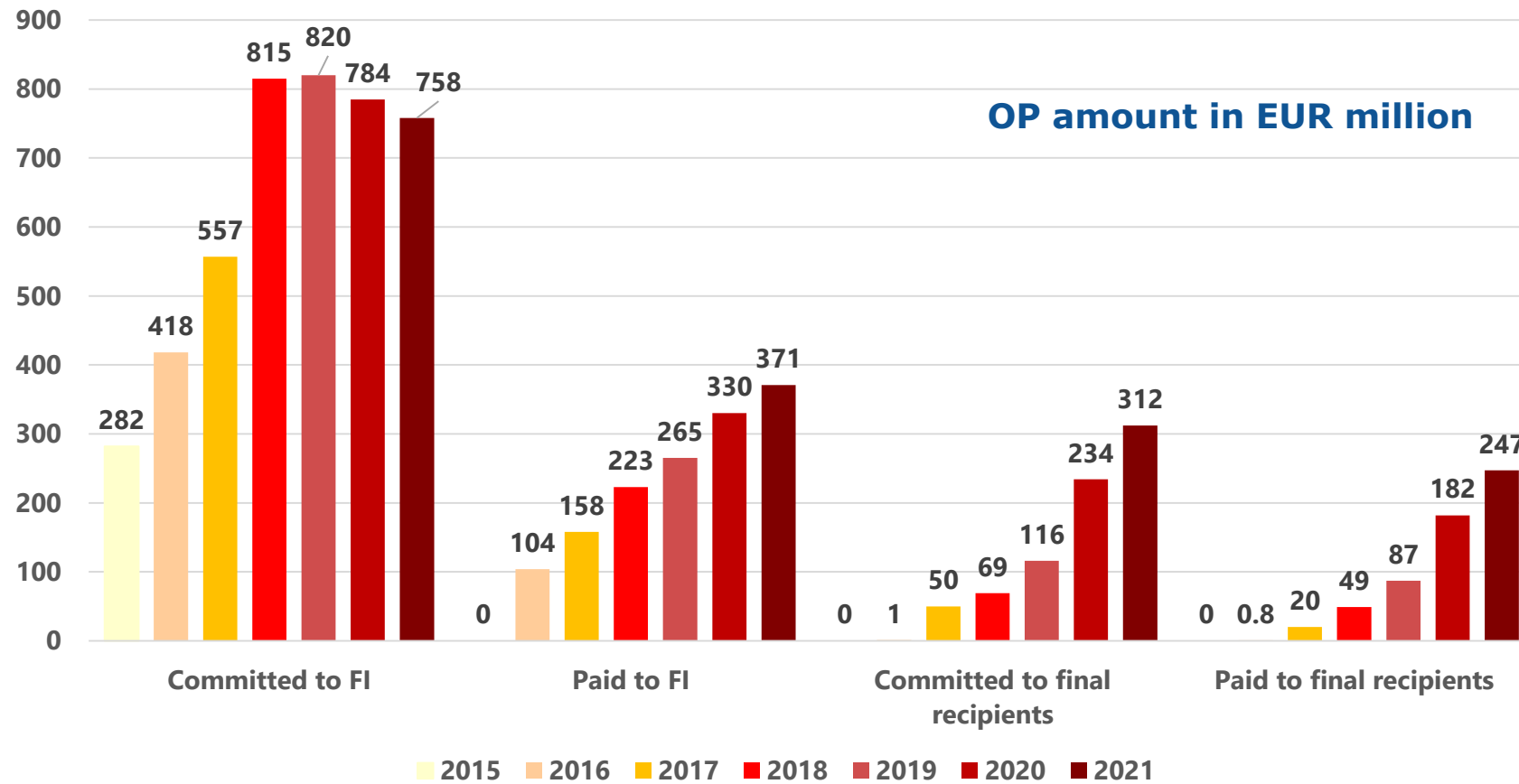
Implementation

Year*	2021	2020	2019	2018	2017	2016
Member States	11	11	10	8	7	7
OPs	31	31	30	28	23	22
FIs**	85	78	55	51	33	23

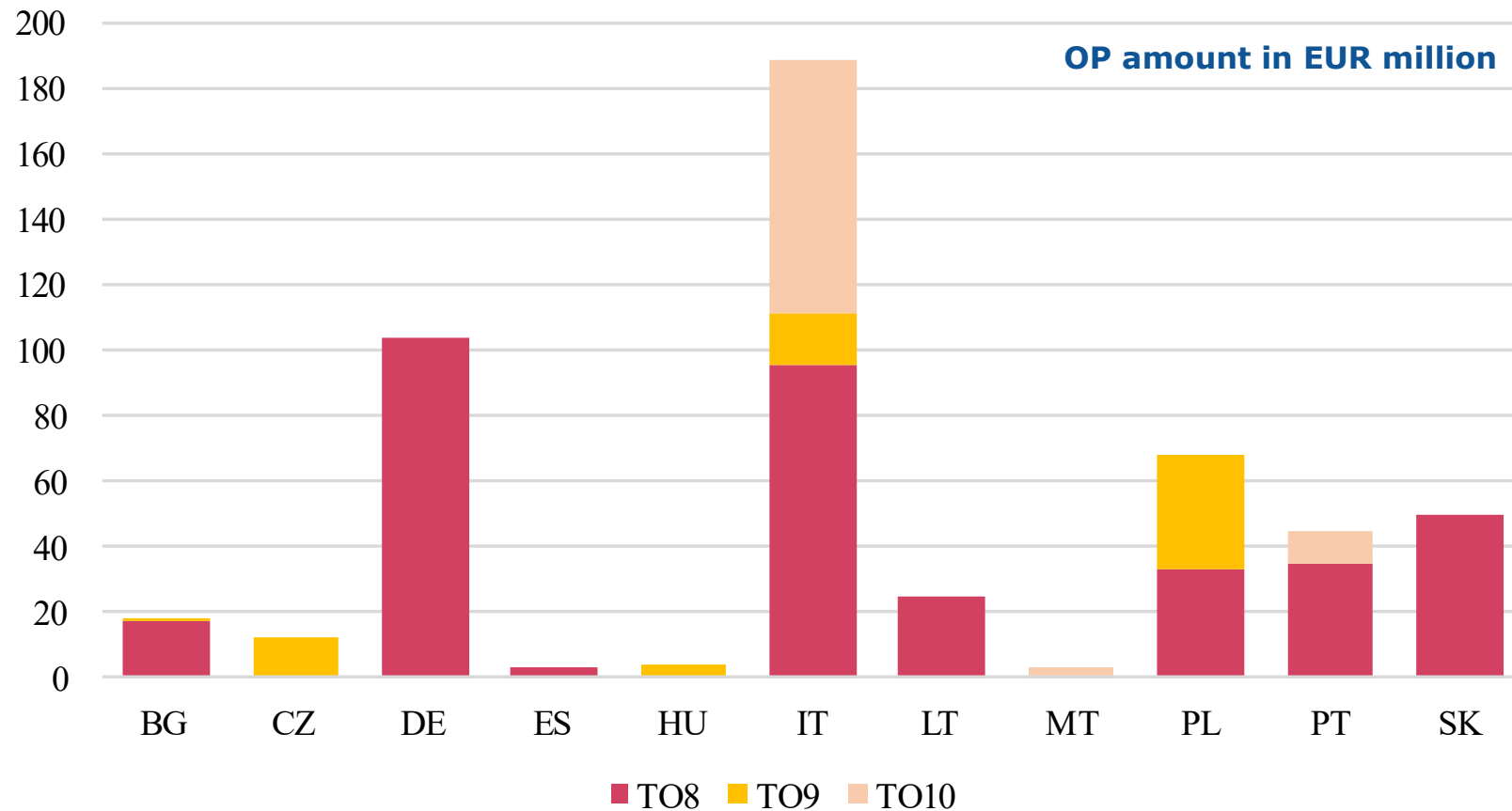
- **26** of the (31) reporting OPs also reported **planned amounts** for FIs***
- **4 OPs with planned amounts** for FIs*** did not report any financial instrument already operational or being in the set-up phase

* Data as of 31 December of each year
 ** Already operational or in the set-up phase
 *** Based on 2013 CPR Article 112

Overall progress

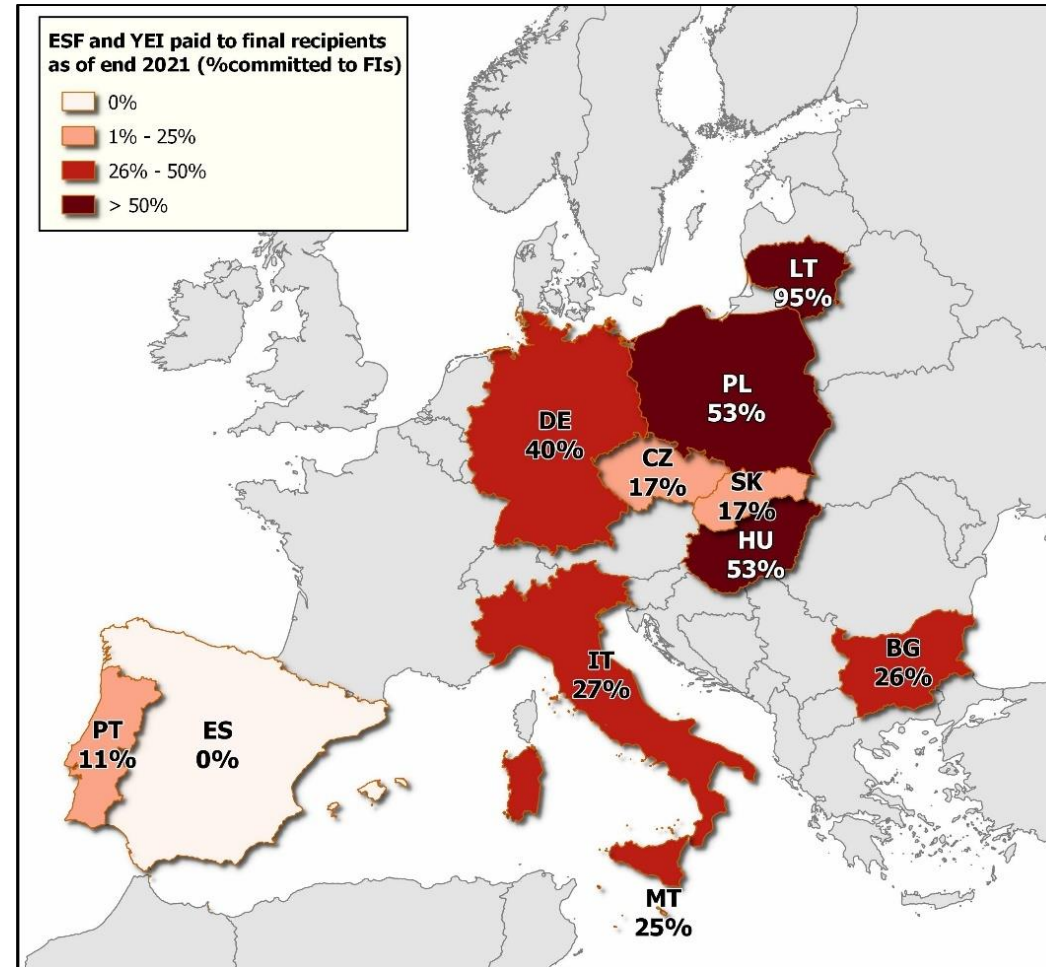


ESF committed by TO



Payments to final recipients

- **EUR 247 million disbursed** to final recipients
- Overall, about **32%** of the ESF and YEI committed to FIs
- In 2021, about **9%** of the ESF and YEI committed to FIs



Type of products

- Vast majority of FIs provide **loans and micro-loans**
- FIs only providing **micro-loans** paid EUR 78 million to final recipients
- **Equity** in DE, PL, PT and SK
- **Guarantees** in BG, MT, PT and SK
- Tiny amount of other support combined within the FI

Final recipients and leverage

Product	Large	SMEs	<i>of which micro</i>	Individuals	Other	Total
Loans	-	4 151	3 894	3 598	11	7 760
Guarantees	-	13	12	1 583	-	1 596
Equity	1	1 464	1 318	-	1	1 466
Total	1	5 628	5 224	5 181	12	10 822

- **93%** of supported SMEs are **microenterprises**
- **BG, CZ, DE, HU, LT, PL** and **SK** focused on **SMEs**
- **IT, MT** and **PT** focused on **individuals**
- Typically, **modest leverage in line with expectations**



Fi-compass & ESF Work Programme

fi-compass advisory support for financial instruments



www.fi-compass.eu

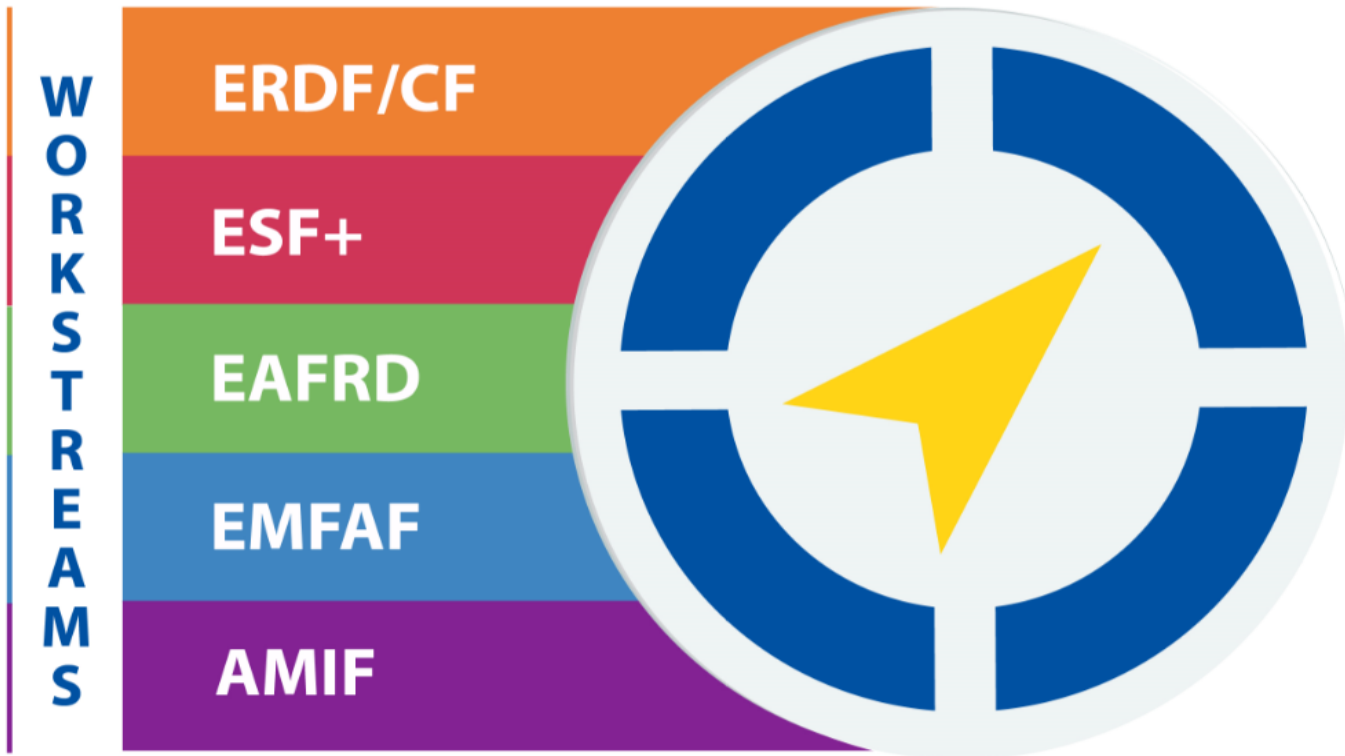
The one-stop-shop for resources
on financial instruments in the
2021-2027 Multiannual Financial
Framework (MFF)



fi-compass work streams



- Awareness raising on FIs
- General advice regarding funds common framework and FIs lifecycle
- Fund-specific advice, taking into account past FIs experiences, fund-specific rules, sector needs and final recipients profiles



fi-compass events



- Ca. 160 events on ESIF FIs organised since 2015
- 18 ESF-specific events
- Big flagship conferences, fund-specific events, thematic events, workshops, internal training sessions
- Main target groups: MAs and financial intermediaries
- Organised face-to-face, and since 2020, online/hybrid
- Result-oriented event communication
- [Past event pages](#) with all resources from events



fi-compass capacity building services and targeted coaching



- Coaching sessions for i.a. MAs considering implementing FIs, or already implementing them
- Tailored to the needs of recipients
- Organised as one or two closed-door sessions with a small number of participants
- Usually organised face-to-face at the premises of the MA, and since 2020 online
- Simultaneous interpretation can be arranged for the recipients
- At **no cost** and with no obligation to further actions for the recipients of the coaching
- Can be the first step in the process to implement FIs



fi-compass publications



- [Publication library](#) on financial instruments under the different shared management funds
- Over 100 titles: case studies, brochures, factsheets, manuals, handbooks

Factsheets, brochures and studies

Summaries, notes, digests and studies on EU financial instruments



Case studies

Examples of good practice in financial instrument implementation



Manuals and Handbooks

Specific 'how to' information to plan, design and implement EU financial instruments

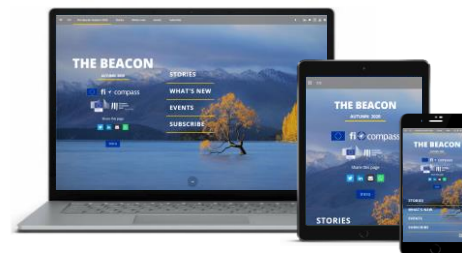
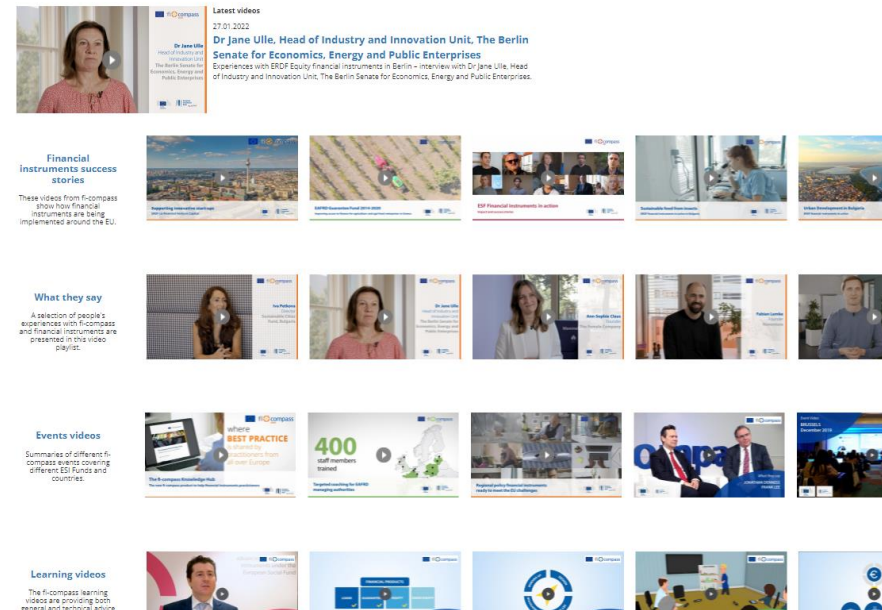


fi-compass website and social media channels



- Over 6 000 contacts with a [fi-compass profile](#)
- Social media channels: ca. 3 000 followers
- [Audiovisual library](#) with ca. 700 videos: video case studies, testimonials, event videos, learning videos
- [Fund-specific pages](#)
- [Country pages](#), surveys, [newsletter](#), [podcasts](#)

fi-compass video gallery





Thank you!

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