

Social investment and skills policy window - InvestEU

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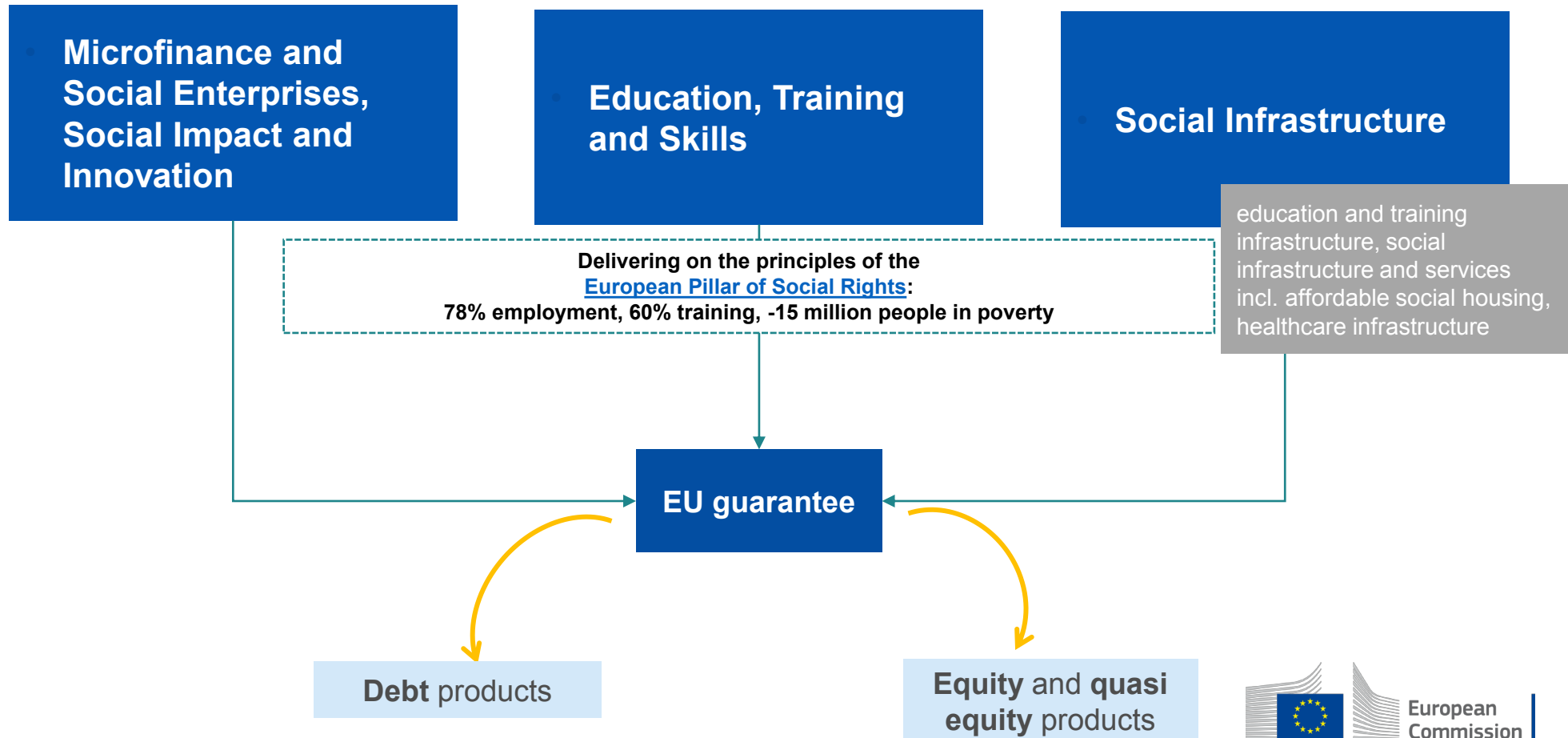
InvestEU Social Window - Policy areas

Three main policy priority areas:

With a budget of



EUR 2.78 bn



Historical Context – Education, Training and Skills

Erasmus+ Student Loan Guarantee Facility (2015-2021): social investment in higher education through guarantee on repayment.

- Promoting 20% intra-European cross-border mobility; improving access to funding for Master students; contributing to EU's 40% tertiary education policy target.
- Results: operated in 10 countries through banks, student lender organisations and 2 universities (LU & CY); EUR 13.5m funding provided to ± 1.150 students, at better conditions. Very high satisfaction rate for participants.

EFSI Skills' pilot (2021): Individual support and Institutional support to cover both the supply and demand sides of education and training.

- 50 million guarantee fund - 17 projects in 14 EU countries.

InvestEU - Education, Training and Skills

Final beneficiaries:

- **Individuals (students and learners)** undertaking an eligible educational programme (EUR 30K);
- An SME, a Small Mid-cap or Small Public Enterprise intending to finance the **up-skilling or re-skilling of their employees** (EUR 2m);
- SMEs, Small Mid-caps, Small Public Enterprises, including organisations and institutions, with a **substantial focus of their economic activity in the field of education/skills** (EUR 2m);
- SMEs, Small Mid-caps, Small Public Enterprises providing **enabling or co-ordination services ancillary to skills and education** (such as recognition and accreditation services, etc.) (EUR 2m);

Delivery mechanism: intermediated [debt](#)

InvestEU – Capacity Building Instrument

- To support microfinance, social enterprise, **skills and education finance providers** to build their **institutional capacity**.
- **Subordinated loans** for investments in:
 - a. organisational development and expansion (branch expansion, IT infrastructure, HR etc.);
 - b. strengthening their operational and institutional capabilities aiming at contributing to their sustainability such as investments in working capital; and
 - c. institutional capacity building to increase their indebtedness capacity while supporting them to retain a balanced socio-commercial orientation.

InvestEU – Social Impact and Innovation

EIF investing on social impact funds targeting education, training and skills.

Final beneficiaries - impact-driven enterprises:

- main objective the pursuit of social impact, including the environmental dimension;
- positive impact as an investment objective at-par with the financial risk/return profile.

Delivery mechanism: intermediated equity, including also innovative delivery methods such as social outcome contracting.

Annex - InvestEU Programme



THE INVESTEU FUND

Mobilising public and private investment using guarantees from the EU budget.



THE INVESTEU ADVISORY HUB

Providing technical advice to investment projects seeking financing.



THE INVESTEU PORTAL

An easily-accessible database bringing together projects and investors.

2021-2027



**SUSTAINABLE
INFRASTRUCTURE**



**RESEARCH, INNOVATION
AND DIGITISATION**



**SMALL AND MEDIUM-
SIZED COMPANIES**



**SOCIAL INVESTMENT
AND SKILLS**

Annex- InvestEU Advisory Hub – Social Window

Advisory initiative for:

- Education, Training and Skills, Social Impact Investing and Social Outcomes Contracting.

Support for:

- Support the identification, **preparation**, development, structuring, procurement and implementation of investment projects;
- Enhance the **capacity** of promoters and financial intermediaries to implement financing and investment operations;
- Support **awareness raising and market development activities** for investment areas experiencing a market failure.



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