



***fi-compass* platform and advisory support**

Bruno Robino, Head of *fi-compass*, European Investment Bank



 #ficompass



What does *fi-compass* offer



- | | | |
|---|---|--|
| 1 | Step-by-step process guidance and manuals | throughout the entire FI life cycle consistent with regulatory provisions, evidence-based practice and the realities of ESIF managing authorities. This includes ESI Fund-specific guidance.
▶ <i>fi-compass offers: Information brochures, Handbooks, Case studies and examples of practice, audio-visual materials</i> |
| 2 | Learning opportunities | to further the necessary understanding & skills in the market
▶ <i>fi-compass offers: Face to Face Training and E-learning opportunities</i> |
| 3 | Awareness raising and networking | for managing authorities, the general public, potential bodies implementing FIs, private and public investors interested in co-investment opportunities, entrepreneurs or enterprises, or for other potential final recipients.
▶ <i>fi-compass offers: Public events (EU conferences, thematic seminars/workshops, networking events), but also promotional campaigns (social media), etc.</i> |
| 4 | Access to a single knowledge hub | to ensure (timely and targeted) availability of information and methodological advice.
▶ <i>fi-compass offers: Knowledge Management Hub (web portal), Newsletters, FAQ, specific publications, etc.</i> |



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How is *fi-compass* delivery structured?

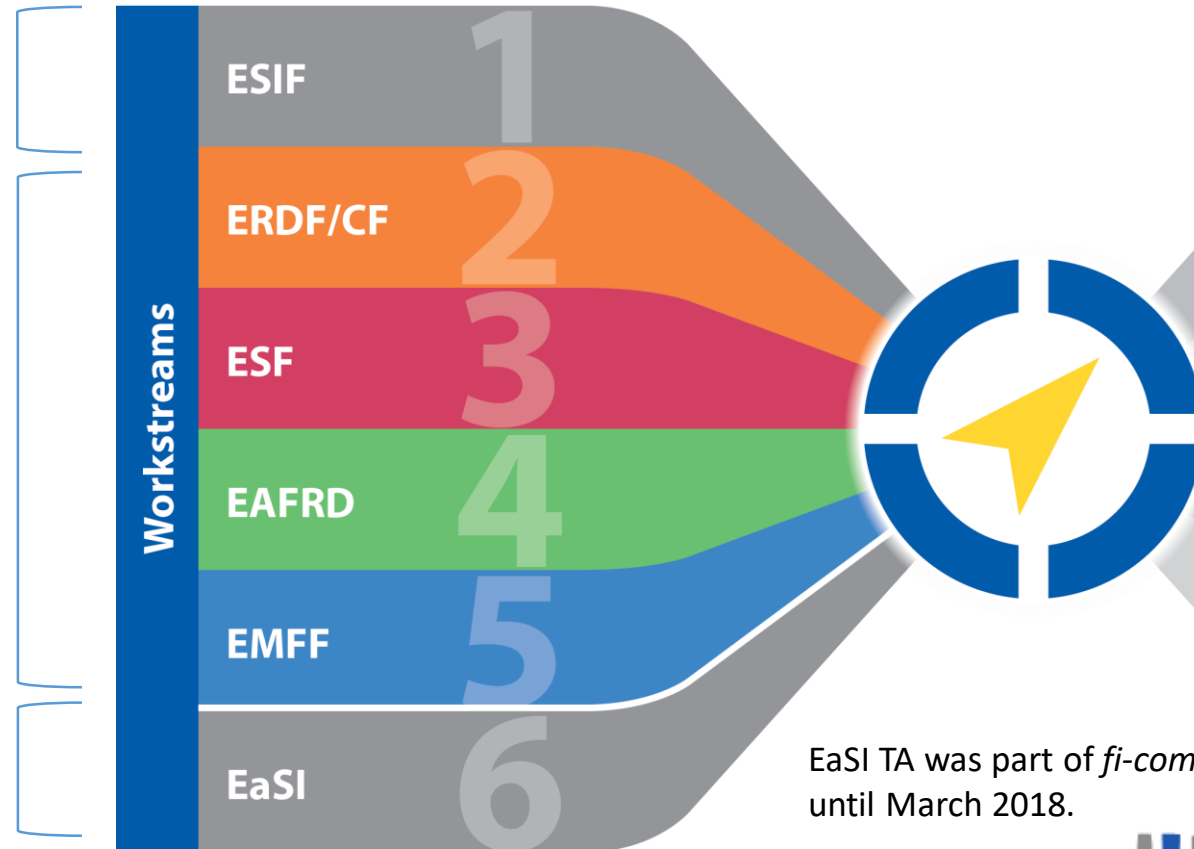


Distinct *fi-compass* work streams

Awareness raising on ESIF FI
General advice regarding ESIF
common framework & FI lifecycle

ESI Fund-specific advice, taking
into account past FI experiences
(if any), Fund-specific rules,
sector needs and final recipients
profiles

Continuation of JASMINE
microfinance support 2007-13



EaSI TA was part of *fi-compass*
until March 2018.



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fi-compass website – single entry point for knowledge about ESIF FIs



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Search

ADVANCED SEARCH

Financial Instruments for the European Structural and Investment Funds

- EUROPEAN REGIONAL DEVELOPMENT FUND / COHESION FUND
- EUROPEAN AGRICULTURAL FUND FOR RURAL DEVELOPMENT
- EUROPEAN SOCIAL FUND
- EUROPEAN MARITIME AND FISHERIES FUND

European Structural and Investment Funds Legislation 2014-2020
European Commission Regulatory Guidance

About fi-compass

fi-compass library

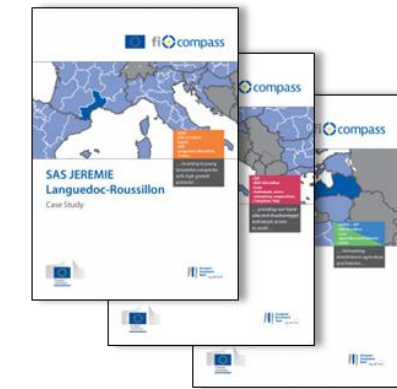
fi-compass news

fi-compass events

Guides



Case studies



Audio-visual material



Access to future and past events



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fi-compass publications



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Different types of publications:

- [EC Regulatory Guidance](#);
- [fi-compass resources](#) e.g. manuals, brochures, case studies;
- [Other resources](#).

Some publications available also in multiple languages.



Manuals and Handbooks



16.02.2017
Manuals and Handbooks

Manual (Introducing financial instruments for the European Social Fund)
> [Read more](#)



13.06.2016
Manuals and Handbooks

Manual (Methodological handbook for implementing an ex-ante assessment of agriculture financial instruments under the EAFRD)
> [Read more](#)



04.11.2015
Manuals and Handbooks

Manual (Scoping study for the use of financial instruments under the EMFF and related advisory support activities)
> [Read more](#)

[See all](#)

Factsheets and Brochures



21.12.2018
Factsheets and brochures

Flexible financial products for the agricultural sector in the EU
> [Read more](#)



21.12.2018
Factsheets and brochures

An agricultural-focused EAFRD financial instrument providing market-responsive financial products
> [Read more](#)



27.11.2018
Factsheets and brochures

Final report: *fi-compass* State aid survey
> [Read more](#)

[See all](#)

Case studies



30.10.2018
Case studies

Case study (Loans and guarantees for SMEs - The JEREMIE Initiative in Cyprus)
> [Read more](#)



11.10.2018
Case studies

Case study ('TEPIX Business Restart' Action, Greece)
> [Read more](#)



03.10.2018
Case studies

Case study (Fisheries and aquaculture, Estonia)
> [Read more](#)

fi-compass events



Wide scope of events:

- **Flagship events:** FI Campus event, Conferences about FIs under EAFRD and ESF;
- **Thematic events:** Events about FIs supporting specific Thematic Objectives;
- **Member State specific events;**
- **Online learning format:** Reporting template for ESIF financial instruments.

Search

ADVANCED SEARCH

Abstract

The *fi-compass* event 'Financial intermediaries and equity financial instruments – working with managing authorities on ESIF equity instruments' took place on 15 and 16 October 2018 in Berlin, Germany.

This event was opened by Stefan Appel, Head of the Financial Instruments and International Financial Institutions Relations Unit, Policy Directorate, DG REGIO, European Commission.

The event provided a platform to exchange experience on ESIF equity financial instruments in 2014-2020, with a special focus on the perspective of financial intermediaries. This exchange was based on three pillars:

- Exchanging knowledge and know-how, through presentations and plenary discussions with experts from national promotional banks and institutions (NPBIs) and other financial institutions, as well as presentations of case studies of equity instruments in the current programming period with support of financial intermediaries;
- Interactive discussion sessions on practical experiences, where smaller groups of financial intermediaries, managing authorities and other stakeholders, with the

Financial intermediaries and equity financial instruments – Working with managing authorities on ESIF equity instruments, 15-16 October 2018, Berlin

Overview



Picture: Mr Stefan Appel, Head of Financial Instruments and International Financial Institutions Relations Unit, DG REGIO, European Commission

Sharing experiences on ESIF equity financial instruments 2014-2020

Equity and quasi-equity financial instruments under the European Structural and Investment Funds (ESIF) are increasingly used by the Member States and regions to support their economic and social development. To exchange experiences with such instruments in the 2014-2020 programming period, more than 90 participants met at the *fi-compass* event on ESIF equity instruments on 15 and 16 October 2018 in the start-up capital of continental Europe – Berlin.

This event aimed to create a platform for representatives from managing authorities, national promotional banks and institutions (NPBIs), private sector financial institutions as well as other involved stakeholders to exchange know-how and practical experiences on ESIF co-financed equity financial instruments.

Day 1 – Project examples of final recipients supported through ESIF equity instruments

The event started with dynamic first-hand insights of two portfolio companies of Berlin's venture capital (VC) funds co-financed with the European Fund for Regional Development (ERDF). These SMEs received as final recipients support from IBB Beteiligungsgesellschaft (fund manager), Nora Blum, Co-founder and CEO of Selfapy, and Valerian Seither, Co-founder of emmySharing, discussed with participants the stories of their businesses and the significance of the support received through the equity instrument for their growth. Exchanges between peers as well as speakers were encouraged on day 1 through the get-to-know and networking opportunities organised by *fi-compass*.



Picture: Ms Irene Schuch, Head of Strategy and Products, Investitionsbank Berlin, Germany



fi-compass communication

- Learning videos;
- Video case studies;
- Short video testimonials;
- Event videos;
- Beacon newsletter;
- Social media activity (LinkedIn, Twitter, YouTube).

fi-compass video gallery



European Commission

Latest videos

14.12.2018

Final recipient's perspective on support received through ESIF equity financial instruments – short interview with Nora Blum, Selfapy, Germany
Video testimonial recorded at the *fi-compass* event 'Financial intermediaries and equity financial instruments – Working with managing authorities on ESIF equity instruments', 15-16 October 2018, Berlin.



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Financial instruments success stories

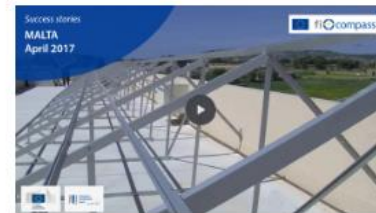
These videos from *fi-compass* show how financial instruments are being implemented around the EU.



Energy efficiency loans for Lithuanian homes



Financial Instruments within the European Social Fund (ESF) in Italy - SELFIEmployment



Financial instruments success stories: Experiences from Malta

[See all the success stories](#)

Learning videos

The *fi-compass* learning videos are providing both general and technical advice about using ESIF financial instruments.



Capacity Building Services for the European Social Fund financial instruments



Financial instruments products



Developing an action plan for ESIF financial instruments

[See all the learning videos](#)

Events videos

Videos on this playlist feature summaries of different *fi-compass* events covering different ESI Funds and countries. They include interviews with people involved in ESIF financial instruments.



FI Campus 2018 – Summary video



Fourth annual EU conference on EAFRD financial instruments for agriculture and rural development



Second *fi-compass* ESF Conference 'Financial instruments funded by the European Social Fund – boosting social impact', 8 – 9 March 2018, Brussels

