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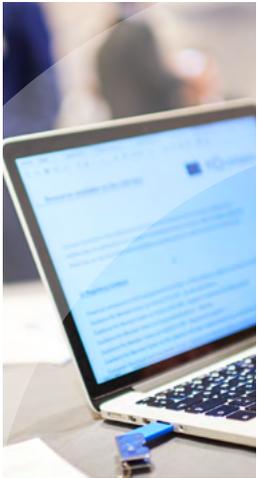
FI Campus event

Financial instruments under the
European Structural and Investment
Funds (ESIF) in the 2014-2020
programming period

Financial instruments, powered by you

Brussels, 29 November – 1 December 2017

Programme





Background

fi-compass is pleased to announce the FI Campus event 'Financial instruments under the European Structural and Investment Funds (ESIF) in the 2014-2020 programming period' on 29 November – 1 December 2017 in Brussels.

FI Campus is a three-day event for all ESIF financial instruments practitioners from across the EU. It is organised by the European Commission and the European Investment Bank. The theme of FI Campus is '*Financial instruments, powered by you*', which reflects the importance of the experience of the growing community of practitioners who have set up and are now operating financial instruments to support investments in a diverse range of sectors including SMEs, energy efficiency, urban development and research & development.

FI Campus will offer a comprehensive programme including information sessions and interactive workshops covering:

- **EC Regulatory Guidance** for ESIF financial instruments presented by Commission experts,
- **Case studies** sharing experiences of the implementation of ESIF financial instruments 2014-2020 in different Member States and regions for a number of Thematic Objectives presented by managing authorities and other involved stakeholders,
- **Market practices**, e.g. selection of financial intermediaries, project selection, risk management and monitoring.



Audience

Up to 300 participants interested in ESIF financial instruments, in particular:

- ESIF authorities directly involved or considering to become involved in the implementation of ESIF financial instruments, as well as
- Bodies implementing or considering to implement financial instruments under ESIF programmes and financial intermediaries.

Methodology

FI Campus participants will have the opportunity to create their own individual learning curricula, choosing from parallel sessions those of their particular interest.

There will also be ample opportunities to network and exchange experiences among the participants and invited experts.



Agenda

Brussels, 29 November – 1 December 2017 (Wednesday, Thursday and Friday)

Venue: Crowne Plaza Brussels – Le Palace, Rue Gineste 3, 1210 Brussels, Belgium

Day 1: Wednesday, 29 November 2017



PLENARY				
9.30 – 11.00	Registration and coffee			
11.00 – 12.30	[010101] Official opening of FI Campus and plenary session on ESIF financial instruments in 2014-2020 programming period ROOM: BALLROOM I and II			
12.30 – 14.00	Lunch			
PARALLEL SESSIONS ON EC GUIDANCE				
14.00 – 15.30	[010201] EC Guidance presentation 1 State aid ROOM: KLIMT	[010202] EC Guidance presentation 2 Implementation options and selection ROOM: EVASION+INNOVATION	[010203] EC Guidance presentation 3 Combination of support (including ESIF-EFSI) ROOM: BALLROOM I and II	[010204] EC Guidance presentation 4 Management verifications and audit ROOM: CREATIVITY+EXPLORATION
15.30 – 16.00	Coffee break			
PARALLEL SESSIONS ON CASE STUDIES				
16.00 – 17.30	[010301] Case study presentation (ERDF) Enhancing the competitiveness of SMEs: Financial Instruments in Thuringia, Germany ROOM: BALLROOM I and II	[010302] Case study presentation Urban Development ROOM: KLIMT	[010303] Case study presentation (ESF) Social entrepreneurship and social inclusion: 'National Fund for Social Entrepreneurship, Poland' ROOM: CREATIVITY+EXPLORATION	
17.30	[010401] Networking cocktail with jazz Crowne Plaza Brussels, Palace Lobby			

(continued overleaf)



Agenda

Brussels, 29 November – 1 December 2017 (Wednesday, Thursday and Friday)

Venue: Crowne Plaza Brussels – Le Palace, Rue Gineste 3, 1210 Brussels, Belgium

Day 2: Thursday, 30 November 2017

PARALLEL SESSIONS ON EC GUIDANCE				
9.30 – 11.00	[020101] EC Guidance presentation 1 State aid ROOM: KLIMT	[020102] EC Guidance presentation 2 Implementation options and selection ROOM: CREATIVITY+EXPLORATION	[020103] EC Guidance presentation 3 Combination of support (including ESIF-EFSI) ROOM: BALLROOM I	
11.00 – 11.30	<i>Coffee break</i>			
PARALLEL ROUND TABLE DISCUSSIONS ON EC GUIDANCE				BRAIN TEASER SESSION
11.30 – 13.00	[020201] Round table discussion 1 State aid ROOM: BALLROOM II	[020202] Round table discussion 2 Implementation options and selection ROOM: BALLROOM II	[020203] Round table discussion 3 Combination of support (including ESIF-EFSI) ROOM: BALLROOM II	[020204] Brain teaser EC Guidance on ESIF financial instruments ROOM: BALLROOM I
13.00 – 14.30	<i>Lunch</i>			
PARALLEL SESSIONS ON CASE STUDIES				
14.30 – 16.00	[020301] Case study presentation (ERDF) Financial instruments for Research, technological development and innovation for Romanian SMEs ROOM: BALLROOM I	[020302] Case study presentation Low carbon ROOM: CREATIVITY+EXPLORATION	[020303] Case study presentation (ESF) Self-employment and Entrepreneurship: 'Entrepreneurship Promotion Fund 2014-2020, Lithuania' ROOM: KLIMT	
16.00 – 16.15	<i>Coffee break</i>			

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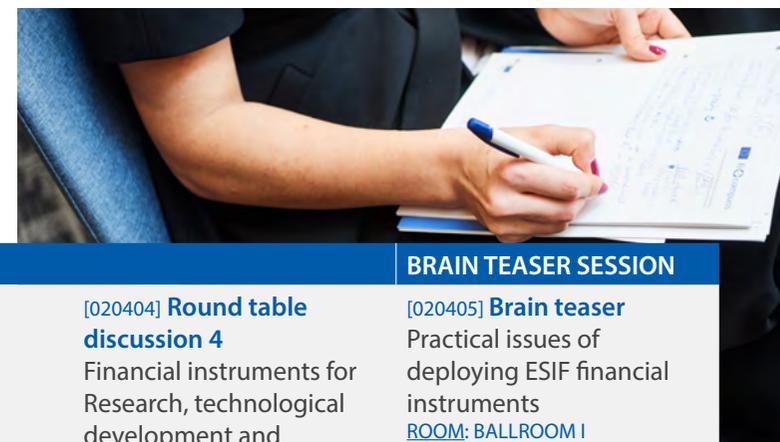


Agenda

Brussels, 29 November – 1 December 2017 (Wednesday, Thursday and Friday)

Venue: Crowne Plaza Brussels – Le Palace, Rue Gineste 3, 1210 Brussels, Belgium

Day 2: Thursday, 30 November 2017



PARALLEL ROUND TABLE DISCUSSIONS ON CASE STUDIES					BRAIN TEASER SESSION
16.15 – 17.30	[020401] Round table discussion 1 (ESF) Self-employment and Entrepreneurship: 'Entrepreneurship Promotion Fund 2014-2020, Lithuania' ROOM: BALLROOM II	[020402] Round table discussion 2 Low carbon ROOM: BALLROOM II	[020403] Round table discussion 3 Urban development ROOM: BALLROOM II	[020404] Round table discussion 4 Financial instruments for Research, technological development and innovation for Romanian SMEs ROOM: BALLROOM II	[020405] Brain teaser Practical issues of deploying ESIF financial instruments ROOM: BALLROOM I
19.30 – 22.00	[020501] Networking evening programme Walking dinner at the Cinquantenaire Museum ROOM: GRAND NARTHEX				

Day 3: Friday, 1 December 2017

FINANCIAL INTERMEDIARIES PANEL SESSIONS		
9.00 – 10.30	[030101] Financial intermediaries panel Venture capital (equity) ROOM: KLIMIT	[030102] Financial intermediaries panel Banks (loans and guarantees, including risk assessment) ROOM: BALLROOM I & BALLROOM II
10.30 – 11.00	<i>Coffee break</i>	
PARALLEL WORKSHOPS		
11.00 – 12.30	[030201] Workshop Project pipeline development ROOM: CREATIVITY+EXPLORATION	[030202] Workshop Project management and monitoring ROOM: KLIMIT
12.30 – 13.00	[030301] Plenary closure of the event ROOM: BALLROOM I & BALLROOM II	
13.00	<i>Lunch</i>	



How to create your individual learning curriculum at FI Campus?

On all three **FI Campus** days, you can choose between multiple parallel sessions dedicated to different aspects related to ESIF financial instruments in the 2014-2020 programming period.

In this way you can create your individual learning curriculum. Once you decided which sessions you would like to attend during the event, please login with your profile on the [fi-compass website](#) and fill in the registration to the **FI Campus** event with the respective sessions of your preference. Your attendance in the sessions is subject to availability of free seats.

For organisational reasons we ask you to try to attend only the sessions at the **FI Campus** which you chose during your registration.

Detailed information about the sessions

PLENARY

Wednesday 29 November 2017, from 11.00 to 12.30

[010101] [ROOM](#): BALLROOM I and II

Official opening of FI Campus and plenary session on ESIF financial instruments in 2014-2020 programming period

Moderator: Ms Jacki Davis

Speaker(s): Mr Eric von Breska, Director, Policy Directorate, Directorate-General for Regional and Urban Policy, European Commission; Mr Simon Barnes, Director of Advisory Services Department, European Investment Bank; Mr Stefan Appel, Head of Financial Instruments and International Financial Institutions Relations Unit, Directorate-General for Regional and Urban Policy, European Commission; and Mr Martin Polónyi, Ministry of Finance, Republic of Slovakia; Mr Patrick Fenech, CEO, Malta Flying; and Mr Stefan Mathesius, CEO, Andalusian Innovation and Development Agency (IDEA)

PARALLEL SESSIONS ON EC GUIDANCE

Wednesday 29 November 2017, from 14.00 to 15.30

[010201] [020101] [ROOM](#): KLIMT

EC Guidance presentation 1

State aid

Speaker(s): European Commission (Ms Egle Striungyte; Ms Gabriela Tschirkova; Ms Hanna Dudka; Ms Vasiliki Avgoustidou)

Application of state aid rules in financial instruments (co-)financed by the European Structural and Investment Funds traditionally raises a lot of questions. The Commission representative will present the content of recently published Guidance on State aid in European Structural and Investment (ESI) Funds Financial instruments in the 2014-2020 programming period. The objective of the session is to explain the application of State aid rules in the field of financial instruments and to point to different possibilities of achieving State aid compliance.



[010202] [ROOM: EVASION+INNOVATION](#)

[020102] [ROOM: CREATIVITY+EXPLORATION](#)

EC Guidance presentation 2

Implementation options and selection

Speaker(s): European Commission (**Mr Sandro Cavrak; Mr Andres Penuela Jimenez; Ms Oana Dordain**)

The managing authorities have to decide on the best implementation option for their financial instruments, and the purpose of the session is to guide them through the specificities and the consequences of the implementation options foreseen in the legislative framework.

The presentation of the Off-the-Shelf instruments is also included in this session. The Commission representatives will also present clarifications about the procedures for selecting bodies to whom the managing authorities may entrust the financial instruments implementation tasks as foreseen in Article 38(4)(b) of the Common Provisions Regulation in line with the Guidance for Member States on the selection of bodies implementing financial instruments.

[010203] [ROOM: BALLROOM I and II](#)

[020103] [ROOM: BALLROOM I](#)

EC Guidance presentation 3

Combination of support (including ESIF-EFSI)

Speaker(s): European Commission (**Ms Rachel Lancry Beaumont; Mr Ricardo Pinheiro; Mr Joerg Lackenbauer**)

Combination of different forms of support gives the possibility to finance broader range of projects. Combination of different EU sources allows for more efficient use of EU budget and better outreach. Guidance note developed by the Commission presents technicalities of such combinations. Commission representative will explain the basic principles of different combinations, including when EFSI resources are involved.

[010204] [ROOM: CREATIVITY+EXPLORATION](#)

EC Guidance presentation 4

Management verification and audit

Speaker(s): European Commission (**Mr Rafael Lopez Sanchez**)

The Commission representatives will present in this session the main aspects of the management verifications and audits for financial instruments (co-)financed by the European Structural and Investment Funds.

PARALLEL SESSIONS ON CASE STUDIES

Wednesday 29 November 2017, from 16.00 to 17.30

[010301] [ROOM: BALLROOM I and II](#)

Case study presentation (ERDF)

Enhancing the competitiveness of SMEs: Financial Instruments in Thuringia, Germany

Speaker(s): **Mr Andreas Beutel**, Intermediary body, Thuringia Ministry for Economics, Science and Digital Society, Germany; and **Ms Heike Gerhardt-LeiBring**, Fund Manager, Thüringer Aufbaubank, Germany

The representatives of the Intermediate body and the Fund manager directly involved in the implementation of the ERDF funded financial instruments for SME support in Thuringia will take the participants through the process of establishing their financial instruments – Thuringia Dynamic & Thuringia Invest. The speakers will describe step-by-step the different life cycle phases, highlighting the essential practical aspects and key challenges in the process, as well as will share lessons learnt from implementing debt financial instruments building on the experiences gained under the 2007-2013 programming period, including how support through grant and loan could be combined.



[010302] [ROOM](#): KLIMT

Case study presentation

Urban Development

Speaker(s): **Mr Ton Overmeire**, City of The Hague, the Netherlands; **Mr Patrick Van Geel**, City of The Hague, the Netherlands; and **Mr Piotr Skiba**, European Investment Bank
The session will focus on the experiences of implementing Urban FIs in the 2014-20 period. Speakers from two different Member States will describe the steps they have taken to establish funds in their area under the CPR. This will be followed by a thematic discussion where the experiences of these two operations will be contrasted, along with experiences shared from the floor by participants.

[010303] [ROOM](#): CREATIVITY+EXPLORATION

Case study presentation (ESF)

Social entrepreneurship and social inclusion: 'National Fund for Social Entrepreneurship, Poland'

Speaker(s): **Ms Aleksandra Dmitruk**, Ministry of Development, Poland; and **Ms Agnieszka Waszkiewicz**, Bank Gospodarstwa Krajowego, Poland
The representatives from the organisations directly involved in implementing the National Fund for Social Entrepreneurship in Poland will take participants through the process of establishing the financial instrument. The speakers will describe step-by-step the different life cycle phases, analysing the essential practical aspects and key challenges, and discuss how lessons learned from the pilot 'Financial engineering support for the development of the social economy' implemented under the 2007-2013 programming period were taken into consideration to further expand the successful use of ESF resources for the support of social entrepreneurship in the 2014-2020 programming period.

[010401] **Networking cocktail with jazz**

Wednesday 29 November 2017, 17.30

Angelo Gregorio Quartet creates a unique chamber jazz style, characterised by a fresh and tasteful repertoire that is rooted to the great jazz masters like: Duke Ellington, Louis Armstrong, Stan Getz, Frank Sinatra and many others. Crowne Plaza Brussels, Palace Lobby

PARALLEL ROUND TABLE DISCUSSIONS ON EC GUIDANCE

Thursday 30 November 2017, from 11.30 to 13.00

[020201] [020202] [020203] [ROOM](#): BALLROOM II

Round table discussions on EC Guidance

1 Round table **State aid**

2 Round table **Implementation options and selection**

3 Round table **Combination of support (including ESIF-EFSI)**

With European Commission experts

Each theme in the parallel sessions on EC guidance will be discussed at two round tables. EC representatives will be at one table, the other will involve peer-to-peer exchange with the support of fi-compass experts. Discussions will start with the main topics from the parallel sessions, and participants can freely circulate to exchange views with the experts and each other. At the end of this session, a short plenary will summarise the results of the exchanges.



BRAIN TEASER SESSION

Thursday 30 November 2017, from 11.30 to 13.00

[020204] ROOM: BALLROOM I

Brain teaser EC Guidance on ESIF financial instruments

The Brainteaser session is an opportunity for participants who do not wish to join the round table discussions to explore some of the key issues presented in the Guidance sessions in a practical, interactive and informal context. Using a game format, participants will work in small groups to tackle questions that relate to the implementation of FIs. This first session focusses on the topics that have been presented in the EC guidance sessions.

PARALLEL SESSIONS ON CASE STUDIES

Thursday 30 November 2017, from 14.30 to 16.00

[020301] ROOM: BALLROOM I

Case study presentation (ERDF)

Financial instruments for Research, technological development and innovation for Romanian SMEs

Speaker(s): Ms Katja Reppel, Deputy Head of Unit for Smart and Sustainable Growth, Directorate-General for Regional and Urban Policy, European Commission; Ms Aneta Stoica, Ministry of Regional Development, Public Administration and European Funds, Romania; Mr Lucian Coman, Managing Authority, Ministry of Regional Development, Public Administration and European Funds, Romania; and Ms Camelia Dragoi, Mandate manager, European Investment Fund, (Fund of Funds Manager)

Representatives from DG Regional and Urban Policy of the European Commission will introduce the concept and rationale behind the Research and Innovation Strategies for Smart Specialisation (RIS3 strategies), as well as on the process of translating them in concrete actions and measures in the framework of the ESI Funds. Practical experience will then be provided by the representatives of the Romanian ERDF managing authority and the manager of the Fund of Funds directly involved in the implementation of SMEs financial instruments for Research, Technological Development and Innovation in Romania under (TO 1) in the form of loans and early stage equity investments. They will take the participants through the process of establishment of the financial instruments and will describe the practical aspects, key challenges and lessons learned in the programming and uptake of the instruments in line with the Romanian RIS3 strategy.

[020302] ROOM: CREATIVITY+EXPLORATION

Case study presentation

Low Carbon

Speaker(s): Dr Györgyi Nyikos, MFB Hungarian Development Bank, Hungary; and Mr Aleksejs Kaņējevs, ALTUM, Latvia

The speakers will describe the steps they have taken to establish and implement their funds under the CPR. The experience from two countries will be presented by the speakers separately. This will be followed by a thematic discussion where the experiences of the two operations will be contrasted, along with experiences shared from the floor by participants.



[020303] ROOM: KLIMT

Case study presentation (ESF)

Self-employment and Entrepreneurship: 'Entrepreneurship Promotion Fund 2014-2020, Lithuania'

Speaker(s): Ms Rūta Dapkute, Ministry of Finance, Lithuania; and Ms Inga Beiliūnienė, INVEGA, Lithuania

The speakers from the organisations directly involved in implementing the Entrepreneurship Promotion Fund (EPF) 2014-2020 in Lithuania will take participants through the process of establishing the financial instrument under the European Social Fund (ESF). The speakers will describe different life cycle phases, analysing the essential practical aspects and key challenges, and discuss how lessons learnt from the EPF implemented under the 2007-2013 programming period were taken into consideration to further expand the successful use of the ESF resources for the support of self-employment and entrepreneurship in the 2014-2020 programming period.

PARALLEL ROUND TABLE DISCUSSIONS ON CASE STUDIES

Thursday 30 November 2017, from 16.15 to 17.30

[020401] [020402] [020403] [020404] ROOM: BALLROOM II

Round table discussions on case studies

1 Round table **Low carbon**

Speaker(s): Dr Györgyi Nyikos, MFB Hungarian Development Bank, Hungary; and Mr Aleksejs Kaņējēvs, ALTUM, Latvia

2 Round table **Urban development**

Speaker(s): Mr Ton Overmeire, City of The Hague, the Netherlands; Mr Patrick Van Geel, City of The Hague, the Netherlands; and Mr Piotr Skiba, European Investment Bank

3 Round table **Financial instruments for Research, technological development and innovation for Romanian SMEs**

Speaker(s): Ms Katja Reppel, Deputy Head of Unit for Smart and Sustainable Growth, Directorate-General for Regional and Urban Policy, European Commission; Ms Aneta Stoica, Ministry of Regional Development, Public Administration and European Funds, Romania; Mr Lucian Coman, Managing Authority, Ministry of Regional Development, Public Administration and European Funds, Romania; Ms Anna Maria Fontana, Ministry of Education, Universities and Research, Italy; and Ms Camelia Dragoi, Mandate manager, European Investment Fund, *(Fund of Funds Manager)*

4 Round table **(ESF) Self-employment and Entrepreneurship: 'Entrepreneurship Promotion Fund 2014-2020, Lithuania'**

Speaker(s): Ms Rūta Dapkute, Ministry of Finance, Lithuania; and Ms Inga Beiliūnienė, INVEGA, Lithuania

The round table on case studies allows participants to interact with the speakers of all thematic case studies presented during FI Campus. Participants can freely circulate to exchange views with the experts and each other. At the end of this session, a short plenary will summarise the results of the exchanges.

BRAIN TEASER SESSION

Thursday 30 November 2017, from 16.15 to 17.30

[020405] ROOM: BALLROOM I

Brain teaser Practical issues of deploying ESIF financial instruments

The Brainteaser session is an opportunity for participants who do not wish to join the round table discussions to explore some of the key issues presented in the Case Study sessions in a practical, interactive and informal context. Using a game format, participants will work in small groups to tackle questions that relate to the implementation of FIs. This second session focusses on the topics that have been presented in the case study sessions.



[020501] **Networking evening programme**

Thursday 30 November 2017, from 19.30 to 22.00

Walking dinner at the Cinquantenaire Museum, Parc du Cinquantenaire 10, 1000 Brussels

FINANCIAL INTERMEDIARIES PANEL SESSIONS

Friday 1 December 2017, from 9.00 to 10.30

[030101] **ROOM:** KLIMT

Financial intermediaries panel

Venture capital (equity)

Speaker(s): **Mr Silvestras Tamutis**, Practica Capital, Lithuania; and **Mr Julien Sainte-Catherine**, Directeur de Participations IRDI Soridec Gestion; and **Ms Irene Schucht**, Investitionsbank Berlin, Germany

Participants in this session have the opportunity to ask questions (during the registration process) to representatives from the venture capital sector. This will allow participants to better understand key aspects of equity financial instrument implementation from the angle of financial intermediaries.

[030102] **ROOM:** BALLROOM I & BALLROOM II

Financial intermediaries panel

Banks (loans and guarantees)

Speaker(s): **Mr Kiril Velitchkov**, CIBANK, Bulgaria; and **Mr Will Church**, CBRE Capital Advisors Ltd, United Kingdom; and **Mr Mindaugas Rudys**, Šiaulių Bankas, Lithuania

Participants in this session have the opportunity to ask questions (during the registration process) to representatives from bank and guarantee institutions. This will allow participants to better understand key aspects of loan and guarantee financial instrument implementation from the angle of financial intermediaries.

PARALLEL WORKSHOPS

Friday 1 December 2017, from 11.00 to 12.30

[030201] **ROOM:** CREATIVITY+EXPLORATION

Workshop

Project pipeline development

Speaker(s): **Mr Michele Alessandrini**, *fi-compass* expert

This workshop session will allow participants to work together in small groups to develop practical solutions to common challenges faced by promoters of financial instruments. This session will be based on a 'real life' scenario and will allow participants to apply their knowledge to estimate, develop and manage a pipeline of potential projects to be financed by the financial instrument.



[030202] [ROOM](#): KLIMT

Workshop

Project management and monitoring

Speaker(s): **Mr Giovanni Familiari**, *fi-compass* expert; and **Mr Salvatore Vescina**, Agenzia per la Coesione Territoriale, Italy

This workshop session will allow participants to work together in small groups to develop practical solutions to common challenges faced by promoters of financial instruments. This session will be based on a 'real life' scenario and will allow participants to apply their knowledge to develop an action plan to support and monitor the ongoing operation of a financial instrument.

[030203] [ROOM](#): BALLROOM I & BALLROOM II

Workshop

Criteria used to select financial intermediaries

Speaker(s): **Mr Tim Wills**, *fi-compass* expert; and **Mr Paul Negrila**, *fi-compass* expert

This workshop session will allow participants to work together in small groups to develop practical solutions to common challenges faced by promoters of financial instruments. This session will consider the process of selection of financial intermediaries. Participants will be asked to work together using a 'real life' scenario to develop the key material required for a successful selection process including market testing, selection and award.

PLENARY

Friday 1 December 2017, from 12.30 to 13.00

[030303] [ROOM](#): BALLROOM I & BALLROOM II

Plenary closure of the event

Moderator: **Ms Jacki Davis**

Speaker(s): **Mr Frank Lee**, Head of Financial Instruments Advisory Division, European Investment Bank; and **Mr Stefan Appel**, Head of Financial Instruments and International Financial Institutions Relations Unit, Directorate-General for Regional and Urban Policy, European Commission



Venue

Crowne Plaza Brussels – Le Palace, Rue Gineste 3, 1210 Brussels, Belgium

> [How to get there](#)

Language

The event language will be English.

Registration

The deadline for registration was **Wednesday, 15 November 2017**.

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.



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