



# Financial instruments delivering ESIF policy objectives in 2014-2020: main messages of the latest annual summary

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# **Financial instruments delivering ESIF policy objectives: *main results of annual summary***

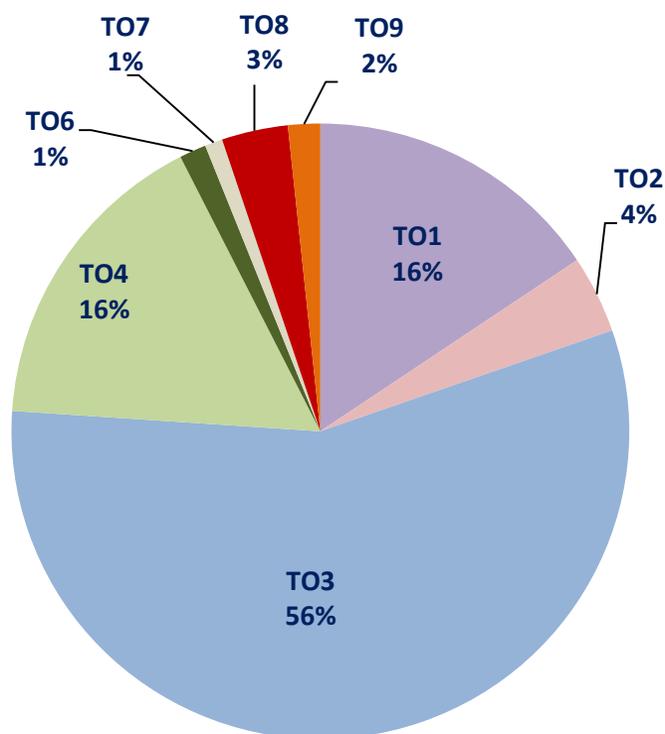
**Stefan Appel, DG REGIO  
Fi-Campus, 3 December 2018  
Brussels**

## ESIF Highlights – as of end 2017

- 24 Member States report using financial instruments (FIs)
- all 4 ESI Funds, 8 thematic objectives
- commitments to FI have increased by 42% compared to the end of 2016
- commitments to FI are well above amounts at closure of 2007-2013

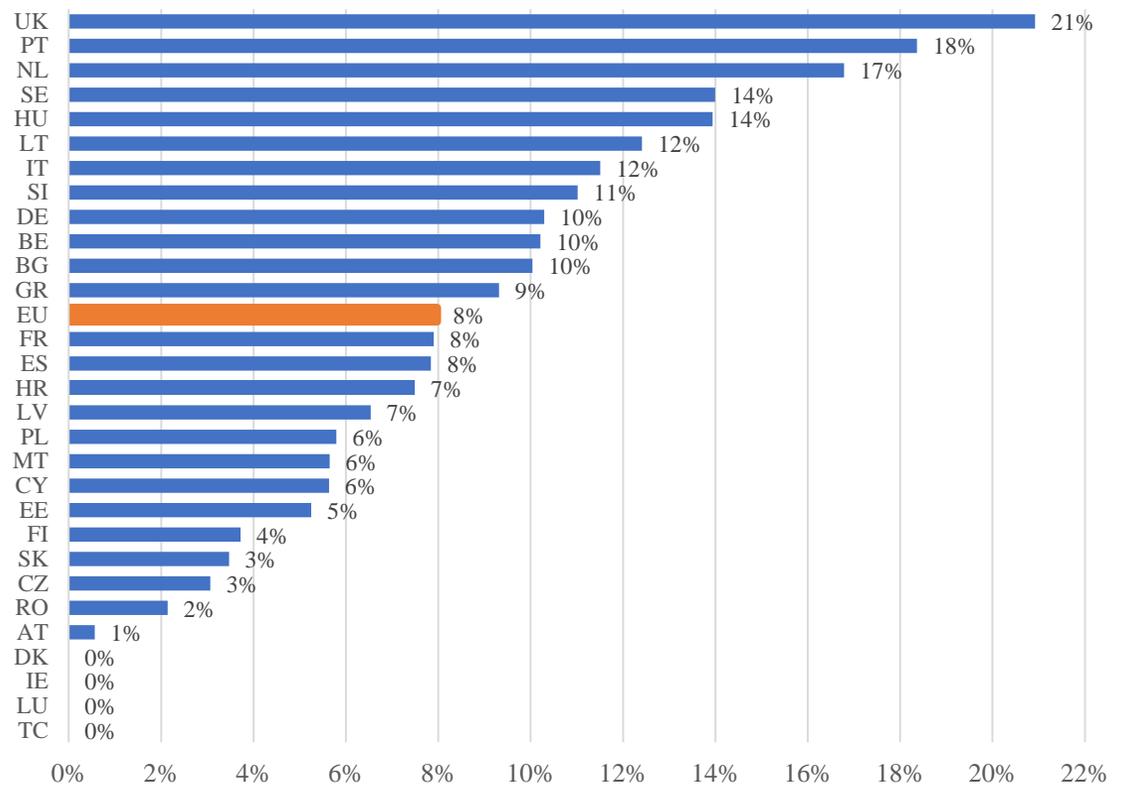
[€ billion]	2014-2020		2007-2013
	<i>end of 2017</i>	<i>end of 2016</i>	<i>at closure</i>
Total amounts	<b>18.8</b>	13.3	16.6
<i>out of which ESIF</i>	<b>14.2</b>	10.3	11.5

## Breakdown by thematic objectives (ESIF)



- TO1 - strengthening research, technological development and innovation
- TO2 - enhancing access to, and use and quality of, ICT
- TO3 - enhancing the competitiveness of SMEs, of the agricultural sector (for the EAFRD) and of the fishery and aquaculture sector (for the EMFF)
- TO4 - supporting the shift towards a low-carbon economy in all sectors
- TO6 - preserving and protecting the environment and promoting resource efficiency
- TO7 - promoting sustainable transport and removing bottlenecks in key network infrastructures
- TO8 - promoting sustainable and quality employment and supporting labour mobility
- TO9 - promoting social inclusion, combating poverty and any discrimination

# FI allocations by Member State (ERDF+CF)

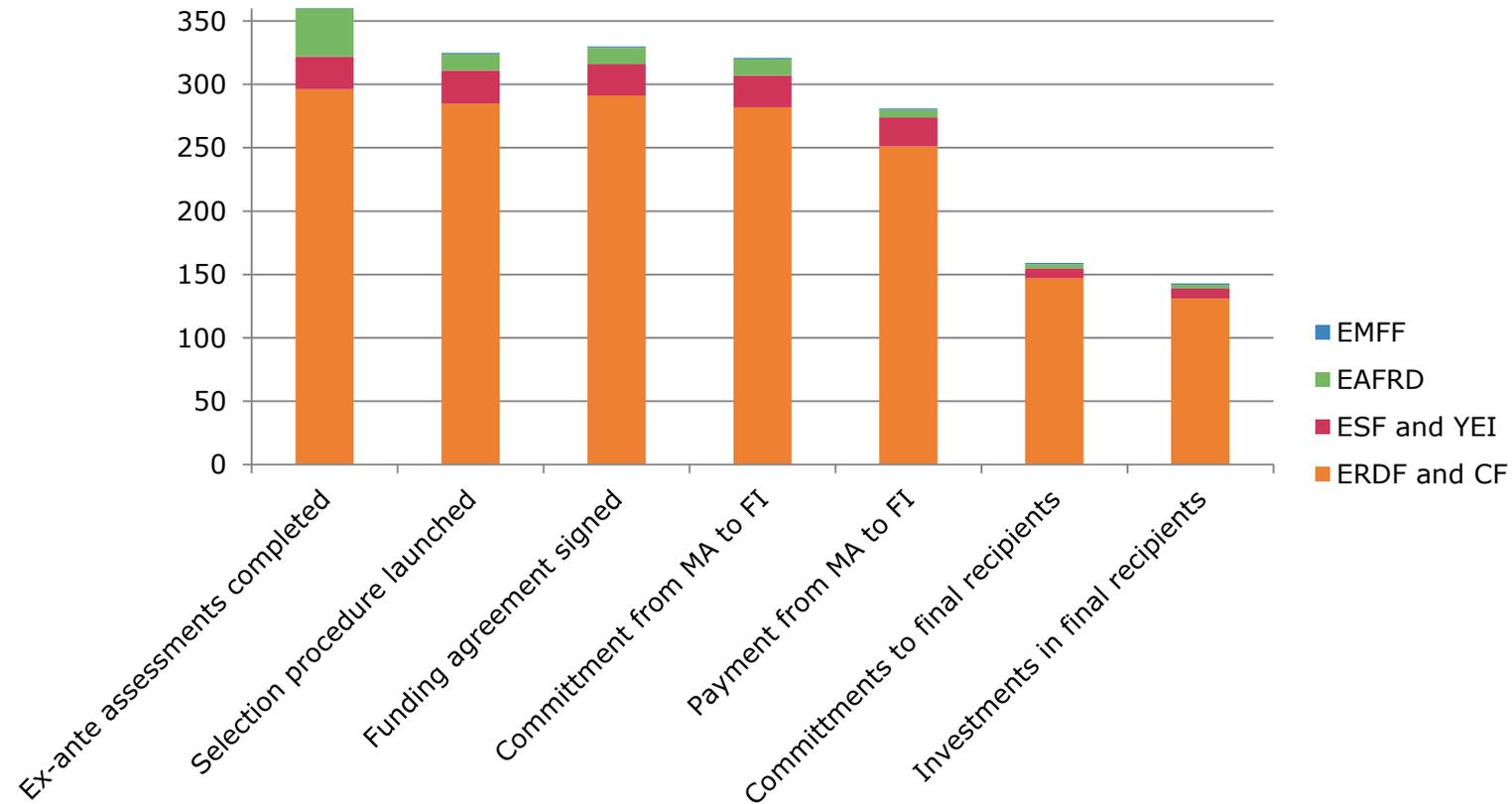


Total indicative allocations in OPs: **€21 billion** (€20 billion in the end of 2016)

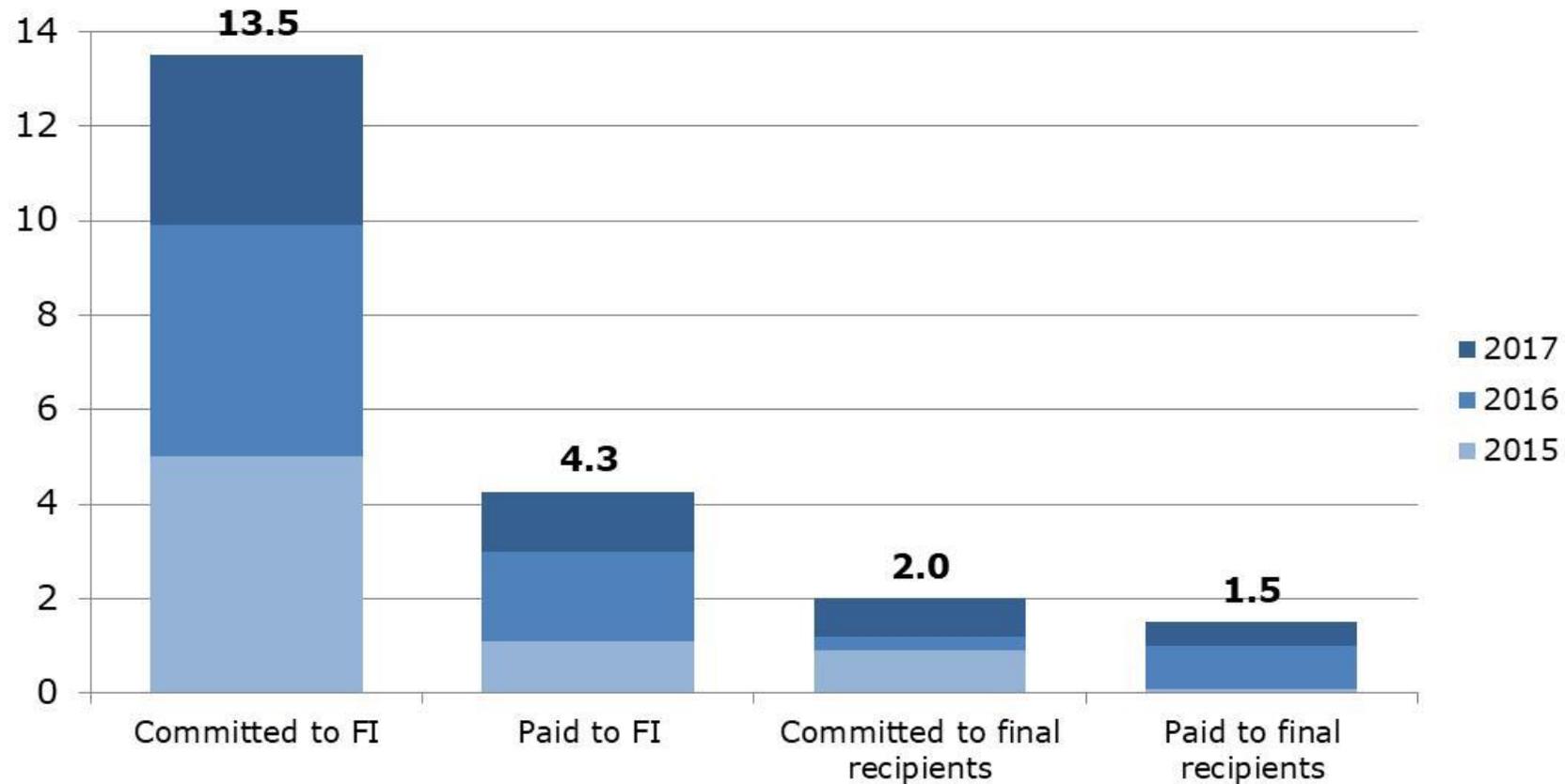
## ESIF Highlights – as of end 2017

- Despite of higher volumes, the number of financial instruments decreased: **459** of FIs were planned for all ESIF at end 2017, compared to a total of **1,058** for 2007-2013 for ERDF and ESF alone
- set-up process very advanced: for ERDF and CF, **65%** of indicative allocation planned in the programmes already covered by contracts signed with financial institutions. This is a higher rate than overall selection rate for all forms of finance including grants, which in the end of 2017 stood at **55%**
- Significant variations among MSs and FIs for disbursements to final recipients: some already very advanced, while many still not reporting yet any payments to final recipients

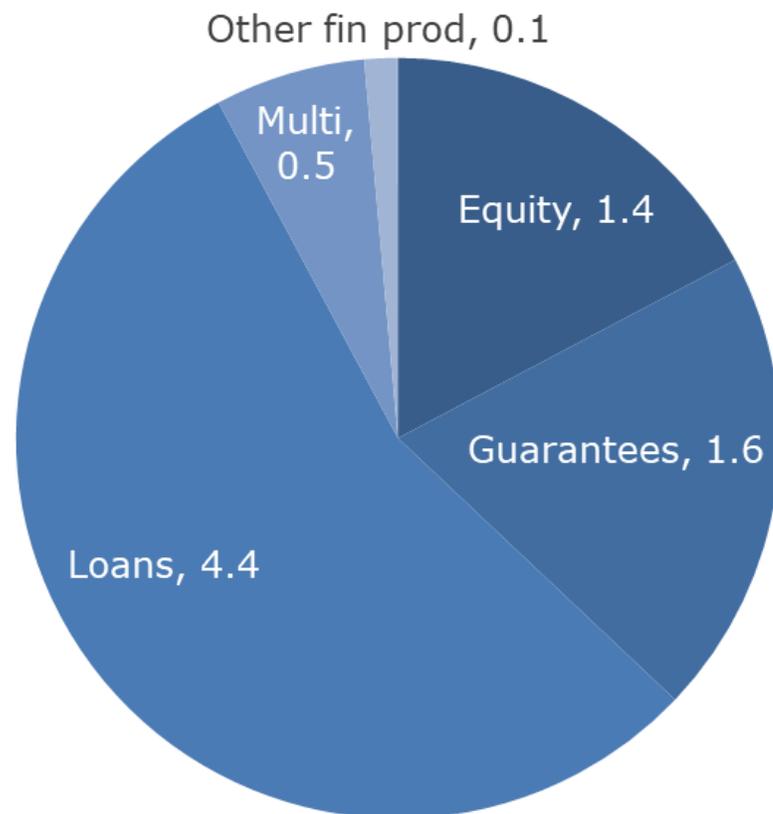
## Progress in setting up (ESIF)



## Progress in setting up (ERDF+CF)



## Financial products (€ bln, ERDF+CF)



Expected leverage:

- loans: up to **7.2**
- guarantees: up to **14**
- equity: up to **7.2**

## Results already reported – end 2017 (ERDF+CF)

➤ Supported enterprises and indicators:

- 50,000+ enterprises supported
- 3,000+ jobs created

	SMEs	<i>out of which microenterprises</i>	Large enterprises
<b>equity</b>	783	483	8
<b>guarantees</b>	53476	31919	
<b>loans</b>	4890	3704	86
<b>other</b>	42	36	
<b>TOTAL</b>	<b>59191</b>	<b>36142</b>	<b>94</b>

- 25,000+ households with improved energy consumption
- 54,000+ tonnes annual decrease of GHG

## Data available online this week:

- Inforegio:
  - [https://ec.europa.eu/regional\\_policy/en/funding/financial-instruments/](https://ec.europa.eu/regional_policy/en/funding/financial-instruments/)
- Open Data platform:
  - <https://cohesiondata.ec.europa.eu/Country-Level/ESIF-2014-2020-Financial-Instruments-Implementatio/dcsc-7x87>
  - cut-off date is the same as for the annual summaries
  - numbers updated compared to the summary, incorporating changes introduced by managing authorities in the annual implementation report after the deadline

