



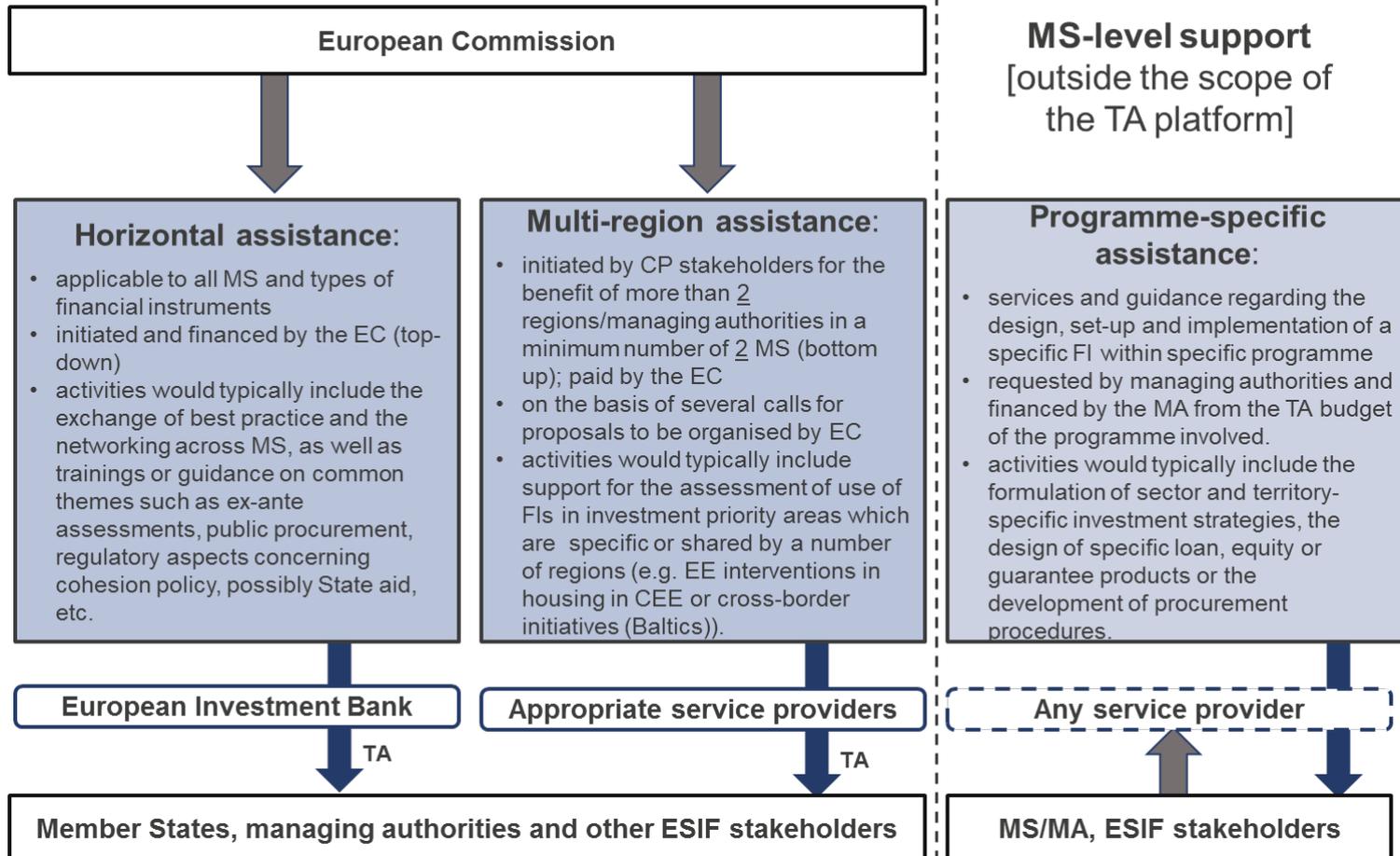
fi-compass advisory platform: Support for financial instruments under the ESF

Ando Siitam

fi-compass, Advisory Services, European Investment Bank

Reminder: *fi-compass* is designed as a catalyst

Two forms of assistance delivery under *fi-compass*



upstream / generic

>>> >>> >>> >>>

downstream / tailored



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.

► ***fi-compass offers:*** *Information brochures, Handbooks, Case studies and examples of good practice, audio-visual materials*

2

Learning opportunities

to further the necessary understanding & skills in the market

► ***fi-compass offers:*** *Face to Face Training (for EC staff and in MS), E-learning opportunities*

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.

► ***fi-compass offers:*** *Public events (EU conferences, thematic seminars/workshops, networking events), but also promotional campaigns (social media), etc.*

4

Access to a single knowledge hub

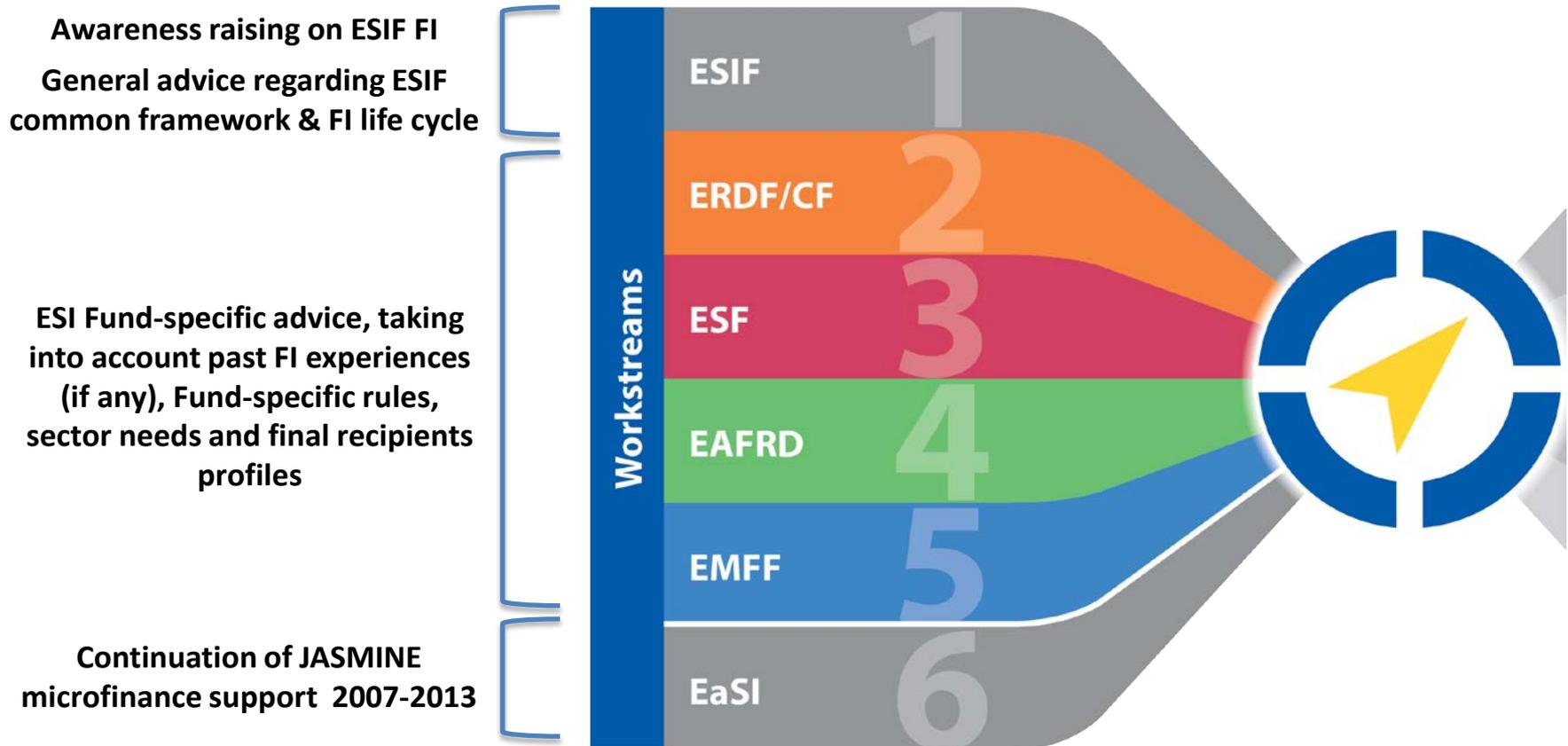
to ensure (timely and targeted) availability of information and methodological advice.

► ***fi-compass offers:*** *Knowledge Management Hub (web portal), Newsletters, FAQ, specific publications, etc.*



How is *fi-compass* delivery structured?

Distinct *fi-compass* work streams

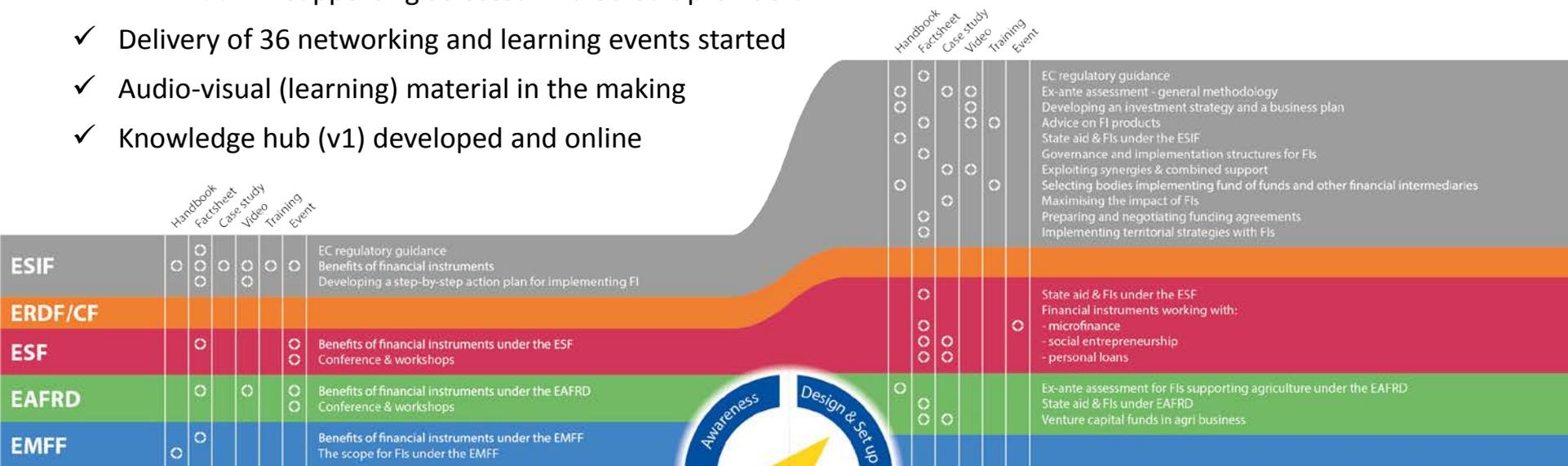




Where do we stand?

Status update

- ✓ Formal programme launch in January 2015
- ✓ First info brochures, case studies and manual published
- ✓ Further manuals & methodologies under way:
 - ✓ ESIF general guides for FI design phase close to publication; further manuals for the set-up phase being in advanced stage
 - ✓ Specific advisory products under way for **ESF**, **EAFRD** and **EMFF**
 - ✓ **EaSI TA** supporting selected microcredit providers
- ✓ Delivery of 36 networking and learning events started
- ✓ Audio-visual (learning) material in the making
- ✓ Knowledge hub (v1) developed and online



EaSI

During 2015, fi-compass will deliver various forms of advisory support to European microcredit providers, as well as business development tools and services to the wider European microcredit sector. It will also promote and strengthen the use of the European Code of Good Conduct for Microcredit Provision.

EaSI advisory services:
- For selected microcredit providers - assessment and rating, advice and tailored trainings
- For wider microfinance sector - helpdesk, workshops, thematic seminars for MFIs on mutual learning
- In support of the European Code of Good Conduct - promotion, evaluation of implementation, training support for microfinance institutions



How can you benefit from the ESIF common work stream?



the life cycle stages of ESIF financial instruments



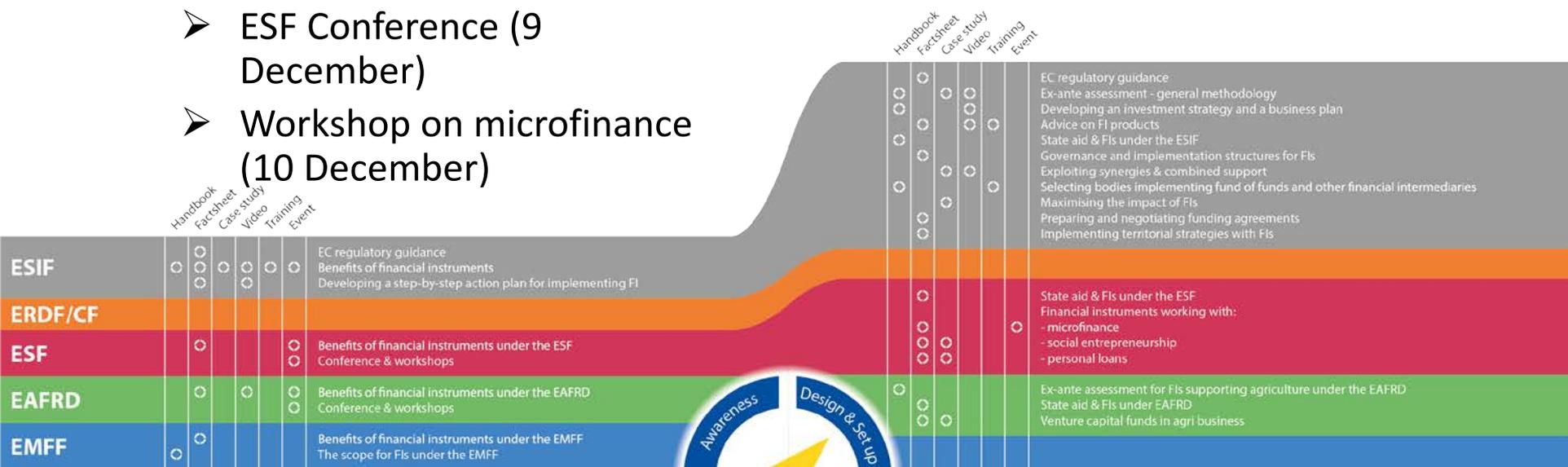
How can you benefit from the ESF work stream?

ESF support 2015

- Scoping study on the application of FIs to ESF
- Factsheet on: microfinance; social entrepreneurship; and personal loans
- State aid factsheet
- Case studies on microfinance and social entrepreneurship
- Awareness raising on ESF FIs:
 - ESF Conference (9 December)
 - Workshop on microfinance (10 December)

ESF support 2016

➔ Make your needs known!



fi-compass events calendar

- **FI promotion, networking, exchange of experiences and learning**
- **Different types of events**
 - EU conferences (ESIF general; EAFRD; ESF); 1-2 day events, up to 300 participants
 - ESI Fund-specific seminars (ERDF/CF; ESF; EAFRD); series of 2-3 events for each ESI-Fund in different EU locations, up to 100 participants
 - Member State-specific events (ESIF general); 25-28 events (tbc); 1 per MS, up to 80 participants
- **Registration to be gradually opened on *fi-compass* website**





fi-compass events calendar

EU conferences

- ✓ ESIF FIs (Brussels, 19-20 January 2015)
- ✓ EAFRD FIs (Dublin, 23-24 June 2015)
- ESF FIs (Brussels, 9 December 2015)

ESI Fund-specific seminars

- ✓ ERDF/CF
 - ✓ Brussels, 27 May 2015
 - ✓ Vienna, 2 June 2015
 - ✓ Warsaw, 9 June 2015
- EAFRD
 - Vienna, 1 October 2015
 - Riga, 29 October 2015
- ESF
 - Paris, 22 September 2015
 - Rome, 21 October 2015
 - Warsaw, 4 November 2015

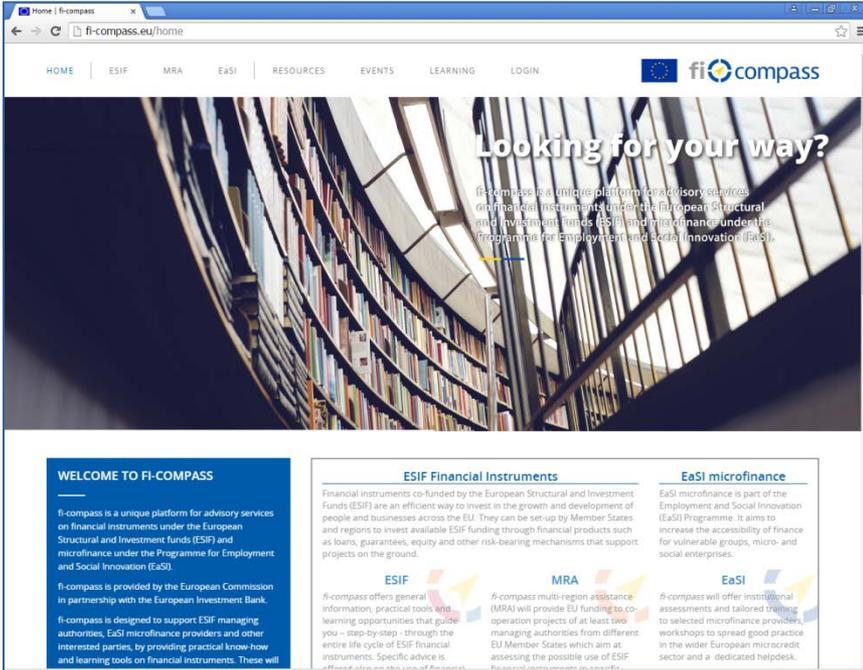
Member State-specific events

- Bratislava, 2 October 2015
- Sofia, 6 October 2015
- Bucharest, 8 October 2015
- Rome, 22 October 2015

Member State-specific events

- Riga, 30 October 2015
- Prague, 10 November 2015 (tbc)
- Madrid, 18 November 2015 (tbc)
- Zagreb, 24 November 2015
- Athens, 3 December 2015
- Lisbon, 18 January 2016
- Ljubljana, 21 January 2016
- Den Haag or Amsterdam, 27 January 2016
- Nicosia, 4 February 2016 (tbc)
- Valetta, 11 February 2016
- Dublin, 16 February 2016 (tbc)
- London, 18 February 2016
- Berlin, 25 February 2016
- Stockholm, 1 March 2016
- Copenhagen, 3 March 2016 (tbc)
- Warsaw, 8 March 2016
- Budapest, 10 March 2016
- Tallinn, 15 March 2016
- Vilnius, 17 March 2016
- Paris, 22 March 2016
- Helsinki, 7 April 2016

fi-compass knowledge hub - single entry point



Looking for your way?

fi-compass is a unique platform for advisory services on financial instruments under the European Structural and Investment funds (ESIF) and microfinance under the Programme for Employment and Social Innovation (EaSI).

WELCOME TO FI-COMPASS

fi-compass is a unique platform for advisory services on financial instruments under the European Structural and Investment funds (ESIF) and microfinance under the Programme for Employment and Social Innovation (EaSI).

fi-compass is provided by the European Commission in partnership with the European Investment Bank.

fi-compass is designed to support ESIF managing authorities, EaSI microfinance providers and other interested parties, by providing practical know-how and learning tools on financial instruments. These will

ESIF Financial Instruments

Financial instruments co-funded by the European Structural and Investment Funds (ESIF) are an efficient way to invest in the growth and development of people and businesses across the EU. They can be set-up by Member States and regions to invest available ESIF funding through financial products such as loans, guarantees, equity and other risk-bearing mechanisms that support projects on the ground.

EaSI microfinance

EaSI microfinance is part of the Employment and Social Innovation (EaSI) Programme. It aims to increase the accessibility of finance for vulnerable groups, micro- and social enterprises.

ESIF

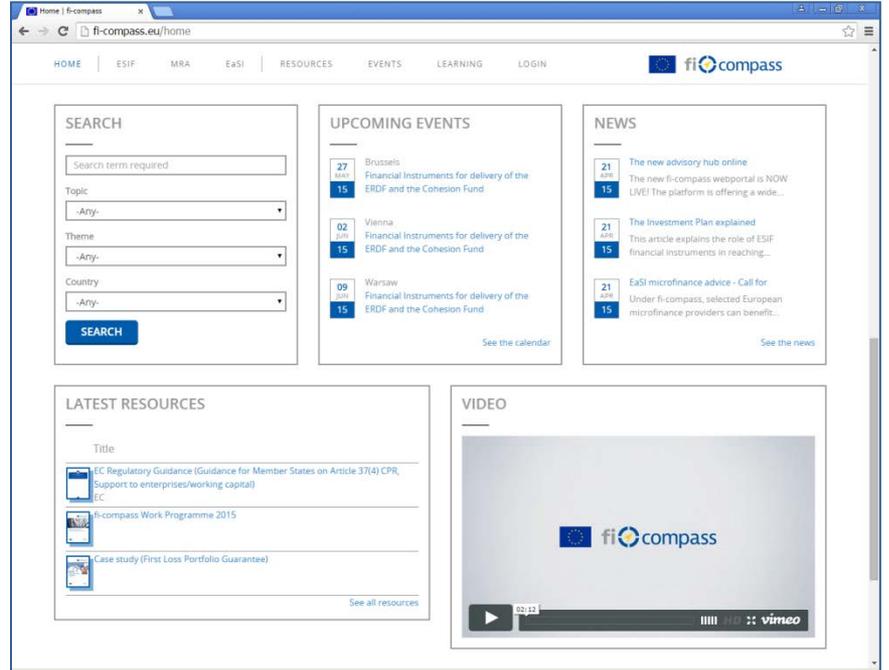
fi-compass offers general information, practical tools and learning opportunities that guide you - step-by-step - through the entire life cycle of ESIF financial instruments. Specific advice is

MRA

fi-compass multi-region assistance (MRA) will provide EU funding to co-operation projects of at least two managing authorities from different EU Member States which aim at assessing the possible use of ESIF

EaSI

fi-compass will offer institutional assessments and tailored training to selected microfinance providers, workshops to spread good practice in the wider European microcredit sector and a dedicated helpdesk.



SEARCH

Search term required

Topic: -Any-

Theme: -Any-

Country: -Any-

SEARCH

UPCOMING EVENTS

27 MAY 15 Brussels Financial Instruments for delivery of the ERDF and the Cohesion Fund

02 JUN 15 Vienna Financial Instruments for delivery of the ERDF and the Cohesion Fund

09 JUN 15 Warsaw Financial Instruments for delivery of the ERDF and the Cohesion Fund

See the calendar

NEWS

21 APR 15 The new advisory hub online The new fi-compass webportal is NOW LIVE! The platform is offering a wide...

21 APR 15 The Investment Plan explained This article explains the role of ESIF financial instruments in reaching...

21 APR 15 EaSI microfinance advice - Call for Under fi-compass, selected European microfinance providers can benefit...

See the news

LATEST RESOURCES

Title

EC Regulatory Guidance (Guidance for Member States on Article 37(4) CPR, Support to enterprises/working capital), EC

fi-compass Work Programme 2015

Case study (First Loss Portfolio Guarantee)

See all resources

VIDEO

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www.fi-compass.eu

fi-compass quarterly newsletter (“the beacon”):

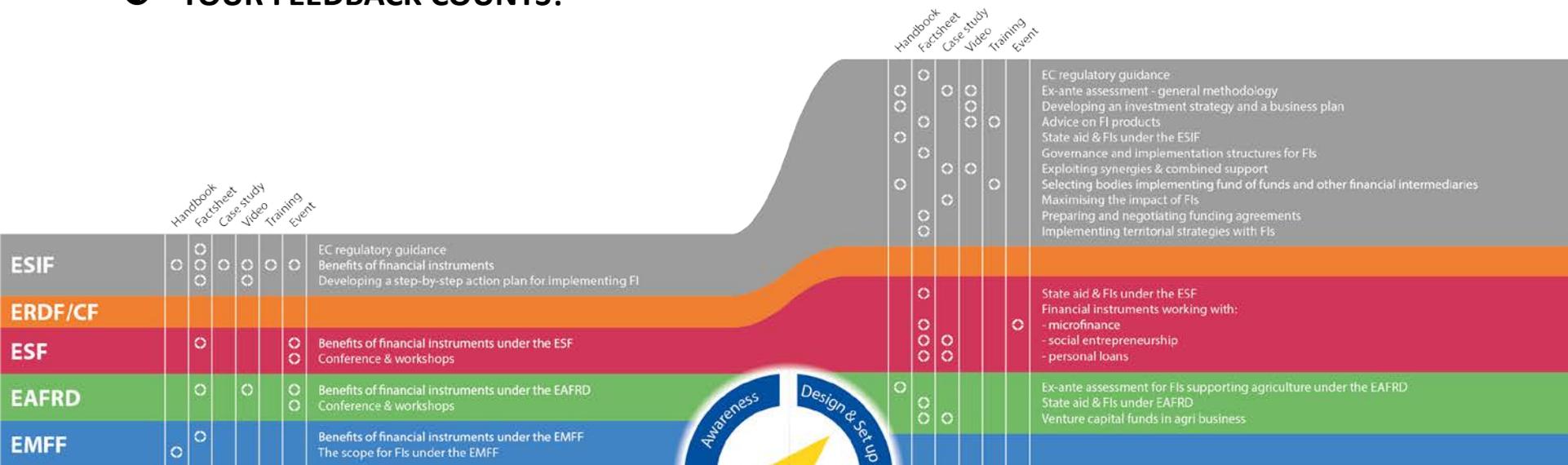
- April 2015 - <http://www.fi-compass.eu/content/beacon-april-2015-7>
- July 2015 - <https://www.fi-compass.eu/newsletter/beacon-july-2015>



What's next?

Next steps

- ➔ Elaborate communications & capacity building strategy (with first pilot activities); subsequent roll-out
- ➔ Further develop knowledge hub functionalities, social media presence and quarterly newsletter
- ➔ Assessment of specific advisory needs in MS and regions to inform the development of subsequent products and tools
- ➔ **YOUR FEEDBACK COUNTS!**



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Thank you

www.fi-compass.eu

