



# ***fi-compass***

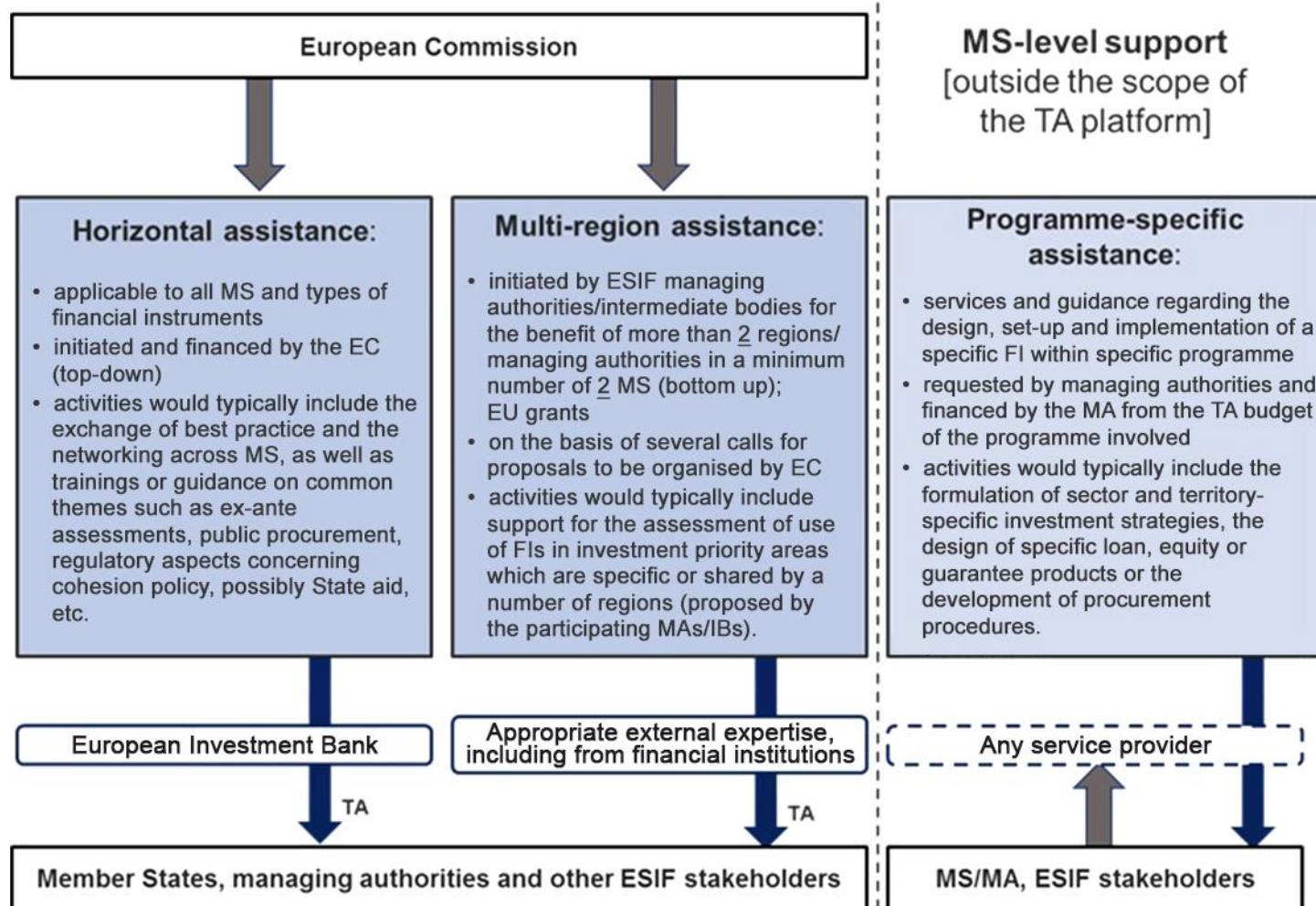
**Anna Zurek,**  
Advisory Services Department,  
European Investment Bank



# 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 practice, audio-visual materials*

2

Learning opportunities

to further the necessary understanding & skills in the market

► ***fi-compass offers:*** *Face to Face Training and 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.*

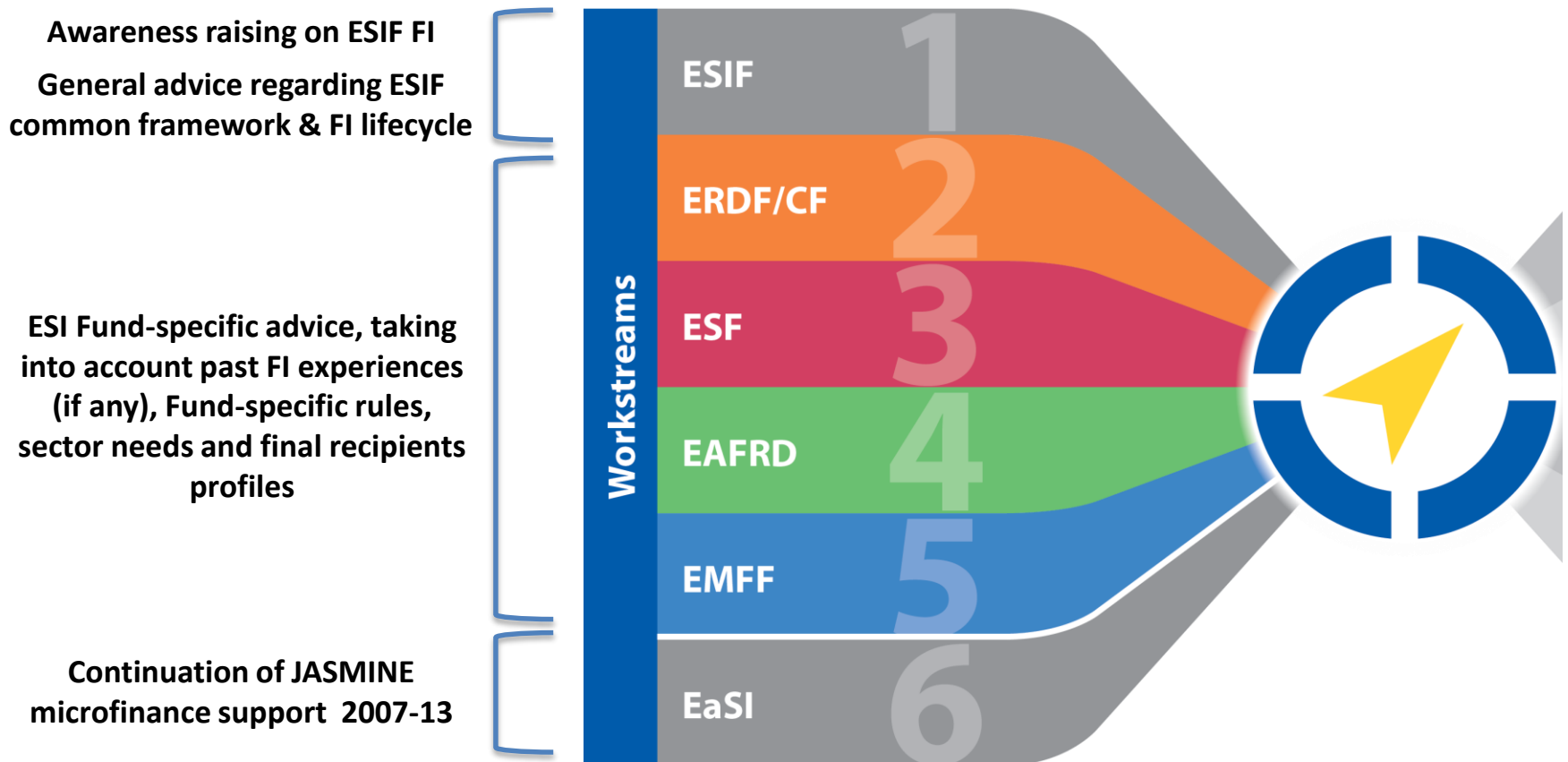
4

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.*

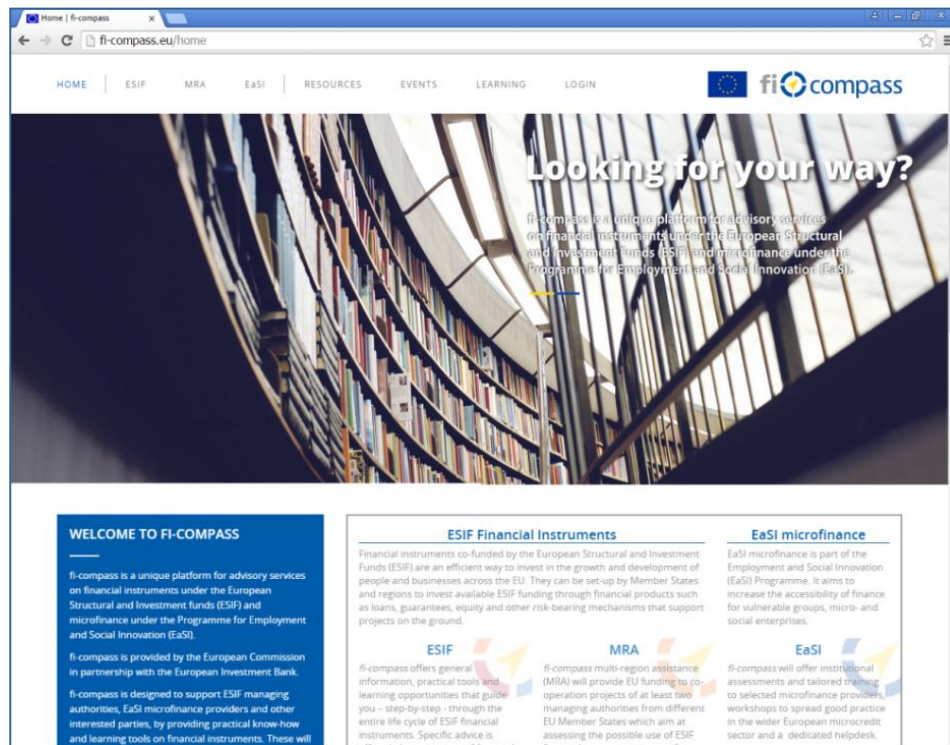
# How is *fi-compass* delivery structured?



**Distinct *fi-compass* work streams**



# fi-compass knowledge hub for ESIF FIs - single entry point



## Guides



## Case studies



## Audio-visual material



## Access to future and past events



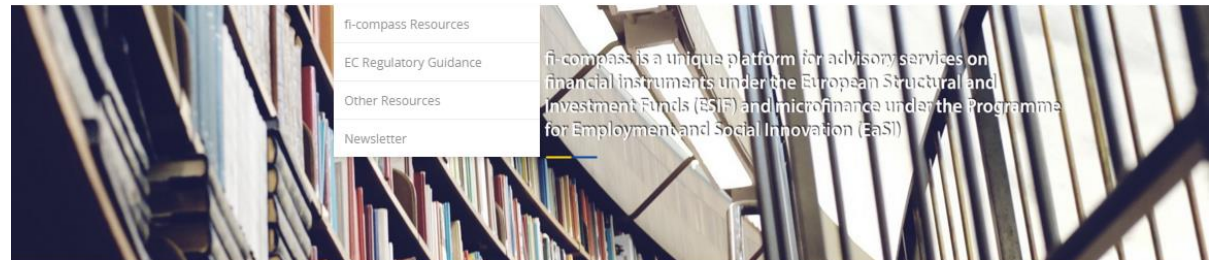
[www.fi-compass.eu](http://www.fi-compass.eu)

## 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**

**Deutsche Sprachversionen:**  
**ESIF, EFRE, ESF, ELER, EMFF**



### RESOURCES

#### EC REGULATORY GUIDANCE

#### FI-COMPASS RESOURCES

##### MANUALS

##### CASE STUDIES

##### BROCHURES

##### OTHER FI-COMPASS RESOURCES

#### OTHER RESOURCES

##### NEWSLETTER

##### FEATURES

##### TOOLKIT

### RESOURCES

Useful resources are available to managing authorities (MA) and financial instrument stakeholders from different providers. They include:

- **EC regulatory guidance** – The European Commission provides guidance in the form of working documents for colleagues and bodies involved in the monitoring, control or implementation of the European Structural and Investment Funds on how to interpret and apply the EU rules relevant to financial instruments. The Commission services' explanations and interpretations of the rules aim to facilitate programme implementation and to encourage good practice.
- **fi-compass resources** – Resources provided by fi-compass aim to address issues faced by MAs before and during establishment and the implementation of financial instruments, being responsive to their needs at different stages of the financial instrument lifecycle. fi-compass' resources aim to improve the understanding of MAs on the technical requirements and/or provide them with practical advice on the approach to take with regard to particular issues.
- **Other resources** – A variety of networks, organisations and practitioners are also forging ahead with implementing financial instruments or advancing the financial instruments agenda. Their insight and learning can be inspirational to those considering implementing financial instruments or looking to further the effectiveness of financial instrument implementation. You can search all these resources using the facility below.

### Factsheet (The European Regional Development Fund (ERDF))



#### Description:

Financial instruments co-funded by the European Regional Development Fund are a sustainable and efficient way to invest in the growth and development of people and businesses in EU regions and cities. They can support a broad range of development objectives to the benefit of a wide range of recipients with the potential for funds to be reused for further investments.

Country: EU28

Objective: 1 Methodological advice

Responsibility: EIB

FI phase: design

#### Download:

[BG](#) [CS](#) [DA](#) [DE](#) [EL](#) [EN](#) [ES](#) [ET](#) [FI](#) [FR](#) [HR](#) [HU](#) [IT](#) [LT](#) [LV](#) [MT](#) [NL](#) [PL](#) [PT](#)  
[RO](#) [SK](#) [SL](#) [SL](#)



## Search tool: advanced function

### Example: SMEs

HOME | ESIF | MRA | EaSI | RESOURCES | EVENTS | LEARNING | LOGIN



#### Search

Enter your keywords

SEARCH

#### Advanced search

Containing any of the words

Containing the phrase

Containing none of the words

search in the...

☐ Agenda

☐ Pages

☐ Events

☐ FAQ

☐ News

☒ Resources

☐ Videos

☐ Video Clip

ADVANCED SEARCH

#### Search results

##### [Guarantees for Agriculture and rural SMEs under the EAFRD](#)

... Guarantees for Agriculture and rural SMEs under the EAFRD Country: ...

##### [Presentation \(Support for SMEs Guarantee schemes under Tuscany ERDF 2007-13\)](#)

... Description: Support for SMEs Guarantee schemes under Tuscany ERDF 2007-13 ...

##### [Case study \(ERDF Languedoc-Roussillon\)](#)

... capital vehicle which takes equity in technology-based SMEs active in different sectors inter alia, health, information technology, ... the establishment of broad eligibility criteria for target SMEs allowed sufficient diversification at the level of the portfolio. The ...

##### [Case study \(First Loss Portfolio Guarantee\)](#)

- FI promotion, networking, exchange of experiences and learning
- Different types of events
  - Member State-specific events in nearly all MS; ca. 80-100 participants
  - ESI Fund-specific seminars (ERDF/CF; EAFRD; ESF); series of 3 events for each ESI-Fund in different EU locations, ca. 100-120 participants
  - EU conferences (ESIF general; EAFRD; ESF): 1-2 day events, up to 300 participants





# fi-compass events calendar



## Event section on the fi-compass website

- **Events calendar** with upcoming events; dedicated event pages with explanation on the aim of the event and the target audience, the (preliminary) agenda and the online registration
- Easy access to all materials from previous events in the **past events section**

HOME | ESIF | MRA | EaSI | RESOURCES | **EVENTS** | LEARNING | LOGOUT

Calendar of Events  
Events Open for Registration  
Event Material  
Past Events

**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 include specific training for quick to face training

**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.

**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 offered also on the use of financial instruments under the ERDF – the

**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 financial instruments in specific thematic areas of common interest

**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.

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.

So if you are a microfinance

# *fi-compass* upcoming events



## Upcoming fi-compass events

- 7 further national events
- Calendar for May 2016 and beyond in development

### EVENTS OPEN FOR REGISTRATION

#### March

	Date_update	Location	Title
📅 ⚡	08.03.2016 (All day)	Warsaw	<a href="#">Financial Instruments delivering ESI Funds</a>
📅 ⚡	10.03.2016 (All day)	Budapest	<a href="#">Financial Instruments delivering ESI Funds</a>
📅 ⚡	15.03.2016 (All day)	Tallinn	<a href="#">Financial Instruments delivering ESI Funds</a>
📅 ⚡	17.03.2016 (All day)	Vilnius	<a href="#">Financial Instruments delivering ESI Funds</a>
📅 ⚡	22.03.2016 (All day)	Paris	<a href="#">Financial Instruments delivering ESI Funds</a>

#### April

	Date_update	Location	Title
📅 ⚡	NEW DATE 14.04.2016	Nicosia	<a href="#">Financial Instruments delivering ESI Funds</a>
📅 ⚡	NEW DATE 19.04.2016	Stockholm	<a href="#">Financial Instruments delivering ESI Funds</a>

#### Legend

📅 Learning 📅 Events

📺 Webstreaming

⚡ Open for registration

\* The current planning for this seminar series is tentative. The indicative timetable will be confirmed as part of preparatory discussions with relevant authorities and stakeholders in Member States. The events will be confirmed with the opening of the registration process on the fi-compass website.

# fi-compass events – past events section



**General information about the event**

**Final agenda**

**Event photos, for some events also [video impressions](#) such as short video interviews with speakers and participants**

### ABSTRACT

A series of Member State events on financial instruments delivering ESI Funds was opened in Bratislava on 02 October 2015. A total of 25 such national events in nearly all Member States are planned for the next five months.

The seminar aimed to:

- provide Ministers, Managing Authorities and other relevant ESI stakeholders from the public and private sectors with an opportunity to learn more about the advantages, features and suitability of financial instruments in delivering ESI 2014-2020 objectives, with a specific focus on the thematic priorities of the Slovak Republic;
- provide the opportunity to learn about and discuss in depth the technical challenges that the stakeholders are facing as regards the design and set-up of financial instruments;
- offer support for Member States and Managing Authorities by introducing relevant fi-compass learning material.

The seminar in Bratislava featured case studies on financial instruments, the opportunities offered by the 2014-2020 regulatory framework, the advisory products issued by fi-compass to support the design and set-up of financial instruments. In addition, two hands-on oriented workshops were provided.

[The final agenda](#)  
[Photo Library](#)

### Seminar: Financial Instruments delivering ESI Funds, Bratislava, 2 October 2015

Bratislava was the stage for the first national fi-compass event, where participants from Slovakia and a few neighbouring countries explored the potential of using financial instruments to deliver 2014-2020 ESI objectives in the local and regional context. Similar seminars will be held in most other Member States during the next five months. The seminar provided the participants with practical information, including case studies and regulatory clarifications, on how financial instruments can help in their efforts to deliver ESI 2014-2020 objectives.

Ivan Lelay, the Slovak State Secretary from the Ministry of Finance welcomed the guests. Three case studies on financial instrument implementation from Slovakia and Poland were presented to provide practical insights for the use of financial instruments.

Martin Pokorný from the Slovak Ministry of Finance highlighted Slovakia's commitment to using financial instruments in 2014-2020 and illustrated the steps towards the set-up of the funds of funds. Two other cases featured experiences from the 2007-2013 period and lessons learned.

Other examples showcased included the Slovak State Housing Development Fund contributions to improved insulation of residential buildings, and a Polish financial instrument of particular relevance for ESI stakeholders supporting social enterprises.

These examples were complemented by a detailed presentation on the key roadmaps, implementation options and guidance provided by the European Commission. The European Investment Bank described what fi-compass can do to help Member States move forward with ESI financial instruments.

Afternoon sessions featured two workshops on both general features of financial instruments as well as an in-depth analysis of their design. During several roundtable sessions, participants engaged in discussions and exercises with moderators and representatives from the European Commission and the European Investment Bank.

Participants had plenty of networking opportunities, where many discussions focused on the specifics of the Slovak context for implementing financial instruments. Please check our [events page](#) for the full calendar of fi-compass seminars.

### VIDEO INTERVIEWS FROM PARTICIPANTS

### FINANCIAL INSTRUMENTS DELIVERING ESI FUNDS, BRATISLAVA, 2 OCTOBER 2015

TIME	SPEAKERS
10:00 - 10:15	Welcome Ivan Lelay, State Secretary of the Ministry of Finance of the Slovak Republic
10:15 - 10:30	Presentation of case studies on Financial Instruments
10:30 - 10:45	Financial Instruments in Slovakia: State of Play Martin Pokorný, Department of Financial Strategy for Economic Growth, Ministry of Finance of the Slovak Republic
10:45 - 11:00	State Housing Development Fund (SDSICA Slovakia) Michal Kaldovský, Head of EU Structural Funds Section, State Housing Development Fund, Slovak Republic
11:00 - 11:15	Loan Fund for Social Economy (European Social Fund) Joanna Wądrogalska, Vice President, Social and Economic Investment Company TISZ S.A. (Financial Intermediary), Republic of Poland
11:15 - 11:30	Opportunities offered by the European Commission (DG REGIO) 2014-2020 Framework
11:30 - 11:45	fi-compass advisory support: Peter Gajdos, European Investment Bank

[presentation](#) [audio](#) [video](#) [case study](#) [file not yet available](#)

**Presentations (for some event also available as [audio](#) or [video](#) files)**

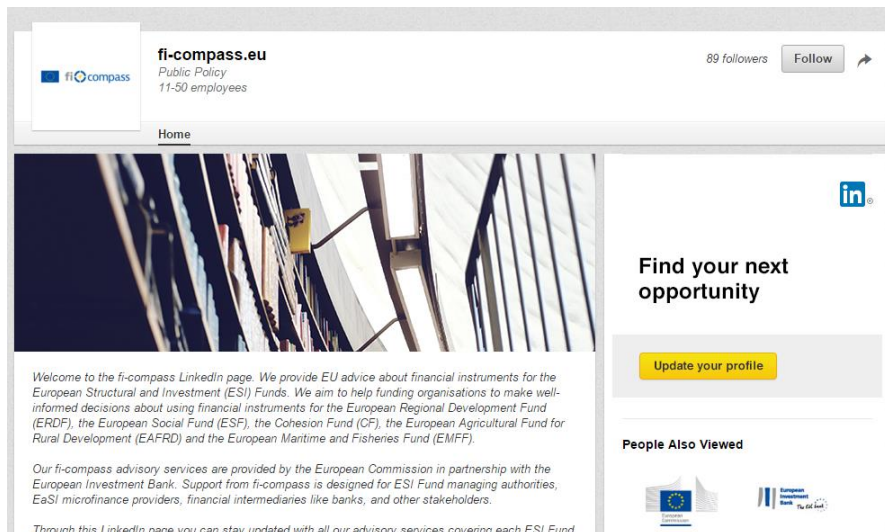
# fi-compass – keeping in touch in social media



## FOLLOW US / SHARE



## Follow us on LinkedIn



## Recent Updates

**fi-compass.eu** A new brochure has been published today that explains how to best combine the European Fund for Strategic Investments (EFSI) and European Structural and Investment Funds (ESI Funds). This brochure is designed to help local authorities and project ... [more](#)



### New guidelines on combining European Structural and Investment Funds with the EFSI

fi-compass.eu • [Add a description](#)

Like (3) • Comment • Share • 1 hour ago

You, IB Hussein and Prody Mwemena Mumba

[Add a comment...](#)

**fi-compass.eu** Awareness raising campaigns can be important success factors for ESIF financial instruments. Experience from Lithuania shows how a mix of marketing channels (including TV and a countrywide promotional campaign titled "Give me a chance") have been ... [more](#)



### Promoting financial instruments to final recipients: Lithuania's Entrepreneurship Promotion Fund

fi-compass.eu • 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)

Like • Comment • Share • 3 days ago

**fi-compass.eu** Microfinance instruments can be useful for supporting microenterprises, unemployed workers, and citizens suffering from disadvantages. By helping to improve access to more affordable finance, these instruments remain particularly useful for ... [more](#)





# fi-compass – keeping in touch in social media



FOLLOW US / SHARE



News

Follow us on  
**Twitter**

**#ficompass**

Search Twitter



Have an account? Log in -



The screenshot shows the Twitter profile of fi-compass (@ficompass). The header features a large banner image of hiking boots on a rocky path. Below the banner is the profile picture (the fi-compass logo) and the name 'fi-compass' with the handle '@ficompass'. The bio states: 'Platform for advisory services on financial instruments and microfinance provided by @EIBtheEUbank and @EU\_Commission #ficompass #financialinstruments'. The website 'fi-compass.eu' is listed. Statistics show 510 tweets, 193 following, 352 followers, 20 likes, and 1 list. A 'Follow' button is present. The 'Tweets' tab is selected, showing a tweet from @EU\_Social about the #ESDE2015 conference. Below it is a tweet from @ficompass about seminars in Valetta. The right sidebar includes a 'New to Twitter?' section with a 'Sign up' button, a 'You may also like' section with recommendations for Wolfgang Petzold, Regional Cooperation, ESPONontheRoad, Agnes MONFRET, and EIBtheEUbank, and a 'Trends' section with hashtags like #tom10, #wrongoneline, #arrow, #cassysbored, high school musical, StaceyDash, and #ntas.

**fi-compass**  
@ficompass

Platform for advisory services on financial instruments and microfinance provided by @EIBtheEUbank and @EU\_Commission #ficompass #financialinstruments

fi-compass.eu

13 Photos and videos

**Tweets** Tweets & replies Photos & videos

fi-compass Retweeted  
EU Social @EU\_Social - Jan 17  
Coming up on Thu: #ESDE2015 conf on employment & social dev'ts in Europe. Watch it live: ec.europa.eu/social/main.js...

fi-compass @ficompass - 17h  
Financial Instruments delivering ESI Funds – Next seminars in Valetta 25/01, The Hague 27/01 and London 18/02 fi-compass.eu/events/list

fi-compass @ficompass - Jan 19  
Flagship fi-compass events will focus on the European Social Fund #ficompass

**New to Twitter?**  
Sign up now to get your own personalized timeline!  
Sign up

**You may also like** - Refresh

- Wolfgang Petzold @WolfgangPetzold
- Regional Cooperation @RegioCoop
- ESPONontheRoad @ESPONontheRoad
- Agnes MONFRET @AgnesMONFRET
- EIBtheEUbank @EIBtheEUbank

**Trends**

- #tom10
- #wrongoneline
- #arrow
- #cassysbored
- high school musical
- StaceyDash
- #ntas


# fi-compass – keeping in touch in social media




FOLLOW US / SHARE

Watch us on  
YouTube









## fi-compass ESIF financial instruments

[Home](#) [Videos](#) [Playlists](#) [Channels](#) [Discussion](#) [About](#) [Search](#)


Popular uploads




Overview from the fi-compass Member State seminar in...  
340 views • 3 months ago




Overview from the fi-compass Regional ESF Seminar in Paris,...  
306 views • 4 months ago




Overview film from the fi-compass regional EAFRD...  
268 views • 3 months ago



Seven steps to effective ex-ante assessments for ESIF financial...  
218 views • 3 months ago




Benefits of financial instruments from the European Agricultural...  
214 views • 5 months ago




Implementing financial instruments in the European...  
214 views • 2 months ago


Uploads




Juan Carlos Maneiro Cadillo, Government of Galicia, Spain  
33 views • 2 weeks ago




Teresa Medina Plan talks about financial instruments in Catalonia  
29 views • 3 weeks ago




José Luis González Serrano, Fisheries Department of the...  
25 views • 3 weeks ago



Pilar Durán Solano on her experience with JEREMIE  
25 views • 3 weeks ago



Miguel Peña Castellot, DG Mare: financial instruments and the...  
64 views • 2 months ago

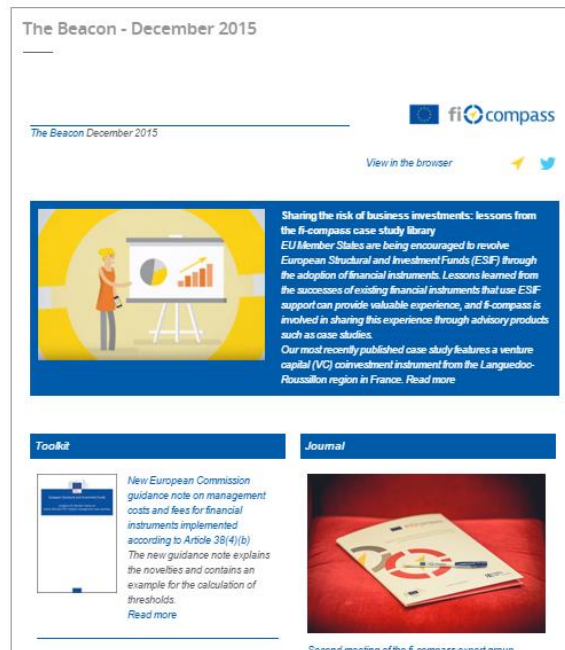


Implementing financial instruments in the European...  
214 views • 2 months ago



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

- April 2015
- July 2015
- Oct 2015
- Dec 2015
- Next newsletter planned for March 2016



## *fi-compass* videos:

- Benefits of financial instruments
- Seven steps to effective ex-ante assessments for ESIF Financial Instruments
- Benefits of the FIs in EAFRD



**Thank you**

[www.fi-compass.eu](http://www.fi-compass.eu)