



fi-compass advisory support

Ando Siitam

Advisory Services,

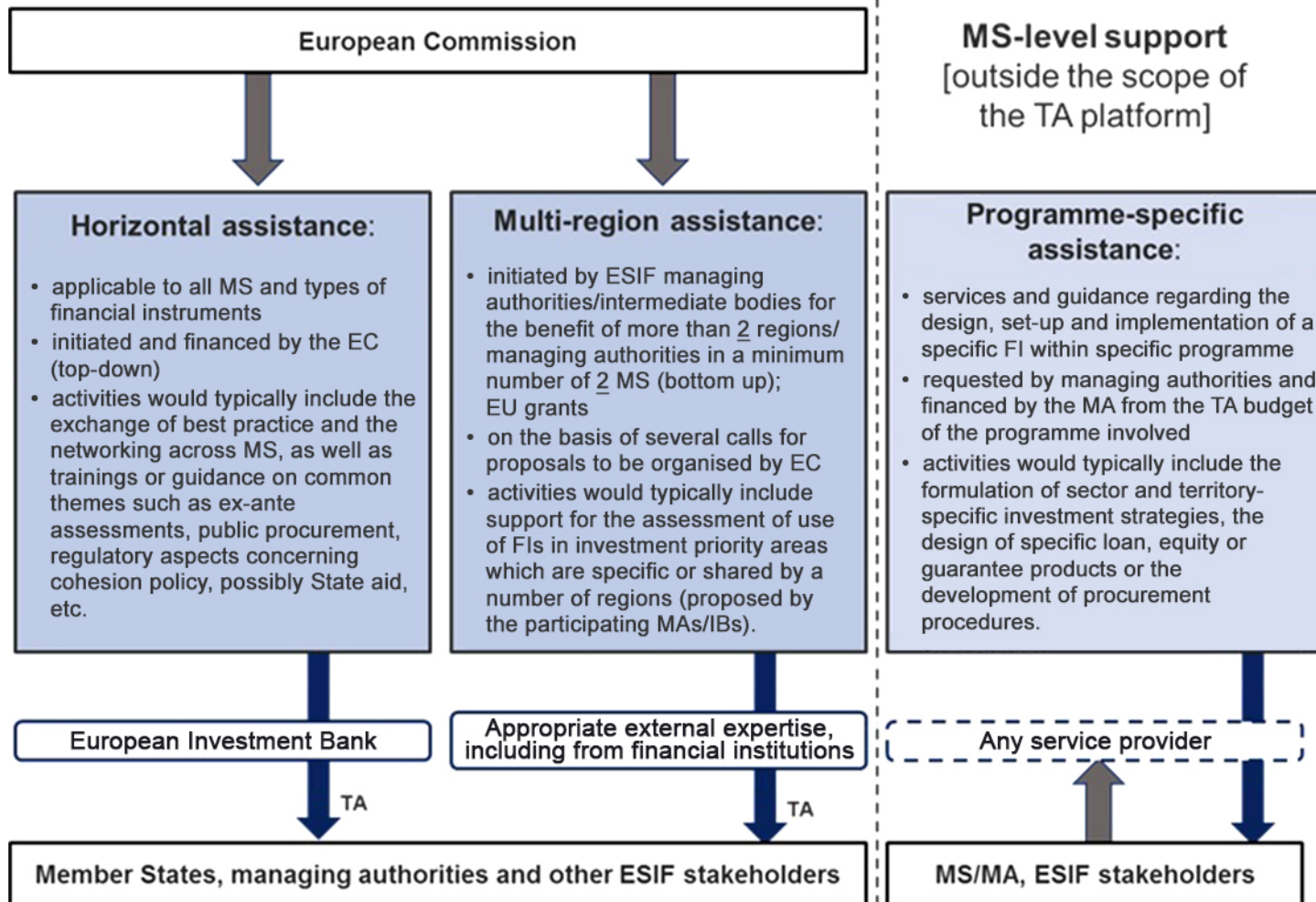
European Investment Bank



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.*

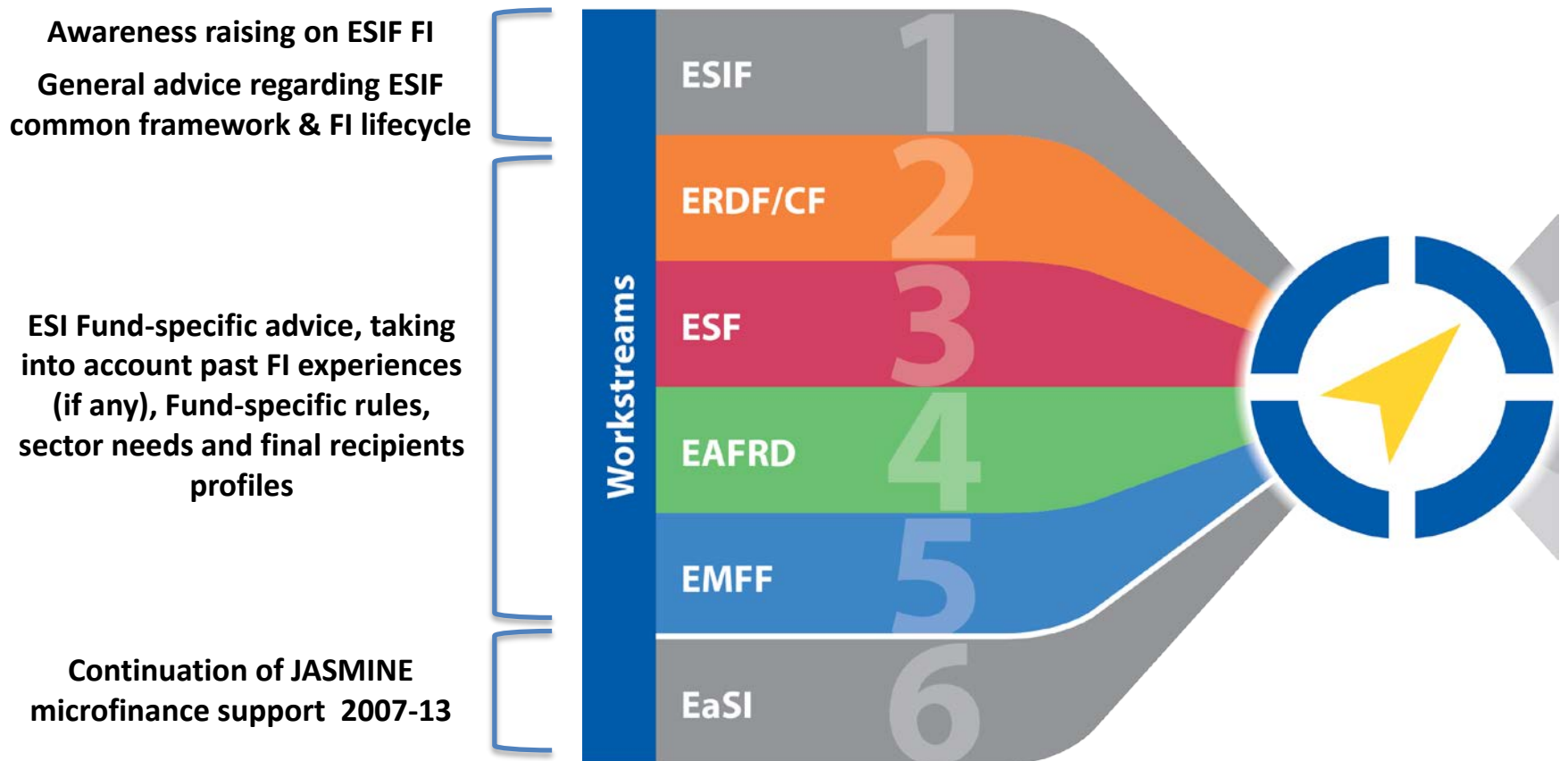
4

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



Home | fi-compass

fi-compass.eu/home

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

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

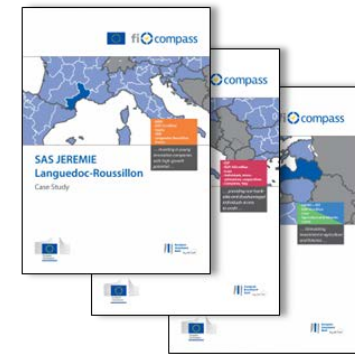
EaSI

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.

Guides



Case studies



Audio-visual material



Access to future and past events



www.fi-compass.eu

fi-compass publications



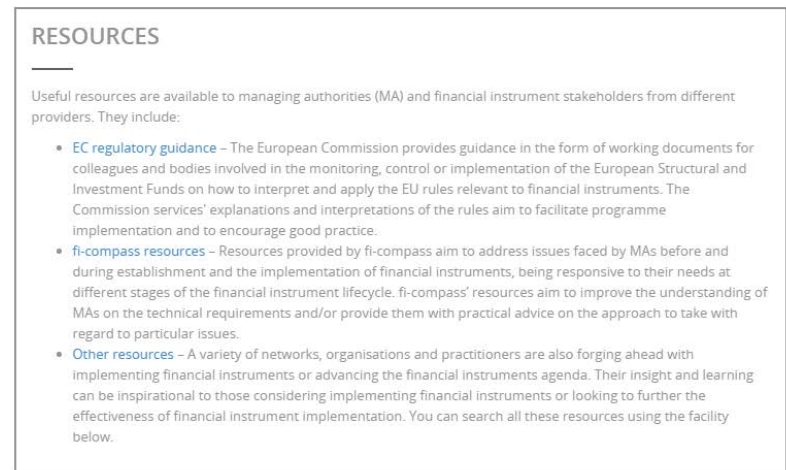
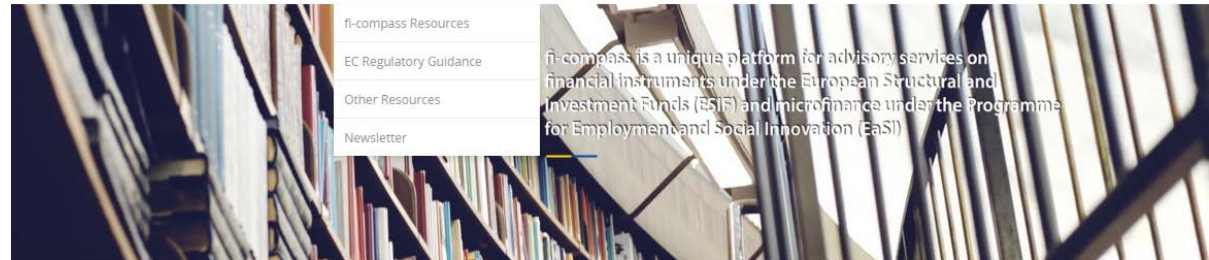
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Different types of publications

- **EC Regulatory Guidance**
- **fi-compass resources e.g. manuals, brochures, case studies**
- **Other resources**

Some publications available also in multiple languages





Search tool: advanced function

Example: ex-ante assessment

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Search

Enter your keywords

SEARCH

Advanced search

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ADVANCED SEARCH

Search results

Filter the results

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[Presentation \(Getting started in 2014-2020: Ex-ante assessment for Financial Instruments\)](#)

... Getting started in 2014-2020: Ex-ante assessment for Financial Instruments: Financial Instruments ...

[EC Regulatory Guidance \(Guidance for Member States on Article 37\(2\) CPR- Ex-ante assessment\)](#)

... Guidance for Member States on Article 37(2) CPR- Ex-ante assessment Country: EU28 ...

[Ex-ante assessment for SME-related financial Instruments: market analysis](#)

Ex-ante assessments are mandatory for managing authorities setting up or ... Commission has released an in-depth guidance covering Ex-ante Assessment Methodology. Volume III addresses specifically the ...

[Ex-ante assessment for SME-related financial Instruments: market analysis](#)

fi-compass events



- 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

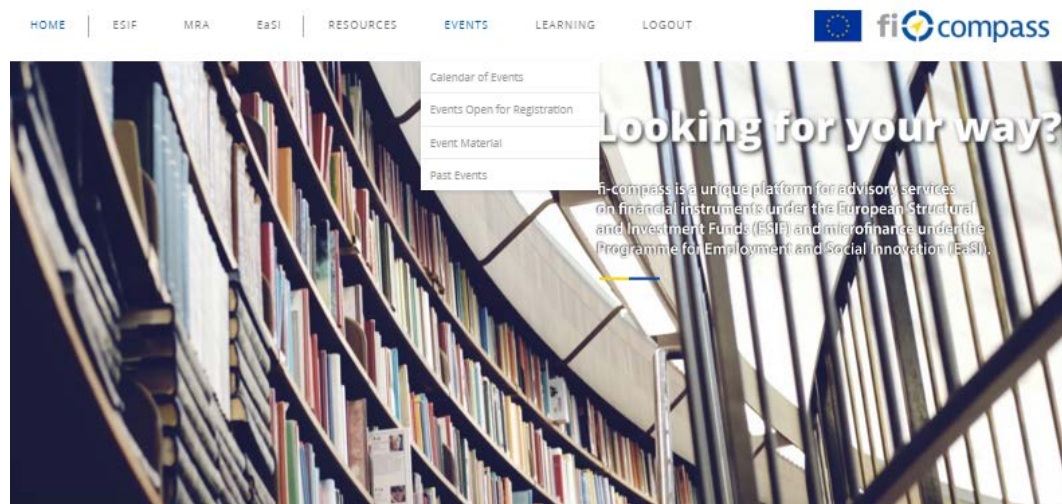


fi-compass events calendar



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**



WELCOME TO FI-COMPASS

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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:

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.

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.

So if you are a microfinance

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 ESF 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 Ministries, Managing Authorities and other relevant ESF stakeholders from the public and private sectors with an opportunity to learn more about the advantages, features and suitability of financial instruments in delivering ESF 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 ESF 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 ESF 2014-2020 objectives.

Ivan Lesay, 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 Polányi 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 ESF stakeholders supporting social enterprises.

These examples were complemented by a detailed presentation on the key novelties, 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 ESF 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

Title	Speakers
Welcome	Ivan Lesay, State Secretary of the Ministry of Finance of the Slovak Republic
Presentation of case studies on Financial Instruments	
Financial Instruments in Slovakia: State of Play	Martin Polányi, Department of Financial Strategy for Economic Growth, Ministry of Finance of the Slovak Republic
State Housing Development Fund (ESSIFCA Slovakia)	Michaella Kolářová, Head of EU Structural Funds Section, State Housing Development Fund, Slovak Republic
Loan Fund for Social Economy (European Social Fund)	Joanna Władzyska, Vice President, Social and Economic Investment Company TISE S.A. (Financial Intermediary), Republic of Poland
Opportunities offered by the European Commission (DG REGIO) 2014-20 framework	
fi-compass advisory support	Pieter Coppens, 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



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fi-compass.eu Looking for advice about ex-ante assessments for financial instruments? Check out our library of manuals on this topic which includes quick reference guides as well as four detailed 'how to' guides for ESIF financial instruments aimed at: • SME ... [more](#)



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Roberto Palloni +1

Add a comment...

fi-compass.eu Did you know that our website hosts the most up-to-date guidance from the European Commission about ESIF financial instruments? You can find all this official guidance here: <https://lnkd.in/dEMNGqg>



fi-compass – keeping in touch in social media



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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...



22 5

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

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Trends

- #hsm10
- #wrongonlive
- #arroy
- #caseystbored
- high school musical
- Stacey Dash
- #ntas

fi-compass – keeping in touch in social media



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The screenshot shows the YouTube channel page for 'fi-compass'. The channel name is 'fi-compass' with a subscriber count of 23. The channel banner features a library aisle. The video player displays 'fi-compass ESIF financial instruments'. Below the player are navigation tabs for Home, Videos, Playlists, Channels, Discussion, and About. The 'Popular uploads' section includes:

- Overview film from the fi-compass regional EAFRD (234 views, 2 months ago)
- Overview from the fi-compass Member State seminar in (239 views, 2 months ago)
- Overview from the fi-compass Regional ESF Seminar in Paris, (233 views, 3 months ago)
- Seven steps to effective ex-ante assessments for ESIF financial (150 views, 2 months ago)
- Martina Rosato: Italian managing authority for the European Soci... (100 views, 3 months ago)
- Alessandro Valenza: fi-compass financial instruments expert (75 views, 2 months ago)

The 'Uploads' section includes:

- Madrid Snapshot Miquel Pena Castellot (32 views, 1 month ago)
- Implementing financial instruments in the European (72 views, 1 month ago)
- Seven steps to effective ex-ante assessments for ESIF financial (150 views, 2 months ago)
- Pavel Chorąży: Polish Ministry of Infrastructure and Development (52 views, 2 months ago)
- Barbara Dziubak: Poland's managing authority for the (74 views, 2 months ago)
- Juris Cebulis: Altum Latvia (27 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**



The Beacon - December 2015

fi-compass

The Beacon December 2015

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Sharing the risk of business investments: lessons from the fi-compass case study library
EU Member States are being encouraged to revolve European Structural and Investment Funds (ESIF) through the adoption of financial instruments. Lessons learned from the successes of existing financial instruments that use ESF support can provide valuable experience, and fi-compass is involved in sharing this experience through advisory products such as case studies.
Our most recently published case study features a venture capital (VC) co-investment instrument from the Languedoc-Roussillon region in France. [Read more](#)

Toolkit

Journal

New European Commission guidance note on management costs and fees for financial instruments implemented according to Article 38(4)(b). The new guidance note explains the novelties and contains an example for the calculation of thresholds. [Read more](#)

Second meeting of the fi-compass expert group



fi  compass

Thank you

www.fi-compass.eu

