

FI Campus 2018

What next for ESIF financial instruments?

Creating new opportunities under the Omnibus Regulation

Brussels

Monday, 3 December – Wednesday, 5 December 2018

Programme





Background

fi-compass is pleased to announce the **FI Campus 2018** event 'What next for ESIF financial instruments? Creating new opportunities under the Omnibus Regulation' on 3-5 December 2018 in Brussels.

FI Campus 2018 is an event for all ESIF financial instruments practitioners from across the EU. It is organised by the European Commission and the European Investment Bank (EIB).

FI Campus 2018 will offer a comprehensive programme, including information sessions and interactive formats covering:

- **Case studies** on ESIF financial instruments 2014-2020 in different Member States and regions for a number of Thematic Objectives, including practical examples of using opportunities of the new Omnibus Regulation to combine ESIF and EFSI resources,
- **Workshops** on key horizontal topics related to ESIF financial instruments 2014-2020,
- **Discussion panels** on the role of financial intermediaries,
- Also **fund-specific sessions** related to financial instruments under the:
 - **European Regional Development Fund (ERDF)**,
 - **European Social Fund (ESF)**,
 - **European Agricultural Fund for Rural Development (EAFRD)**, and the
 - **European Maritime and Fisheries Fund (EMFF)**.

Audience

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 2018 participants will have the opportunity to create their own individual learning curricula, choosing the parallel sessions that reflect their particular interest.

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



[Click here to watch the FI Campus 2017 event summary video](#)



AgendaDay1

Monday, 3 December 2018 | **Venue:** Crowne Plaza Brussels - Le Palace, rue Gineste 3, 1210 Brussels, Belgium

PLENARY

- 16.00 – 17.30 *Arrival of participants at the venue and registration*
- 17.30 – 18.30 [010101] **Get-to-know and networking session**
ROOM: KLIMT AND OPEN SPACE ON THE GROUND FLOOR
- 18.30 – 19.00 [010201] **Official opening of FI Campus 2018 and welcome speeches**
ROOM: PALACE BALLROOM
- 19.00 – 19.30 [010301] **Financial instruments delivering ESIF policy objectives in 2014-2020: main messages of the latest annual summary**
ROOM: PALACE BALLROOM
- 19.30 – 22.00 [010401] **Networking cocktail with jazz**
ROOM: OPEN SPACE ON THE GROUND FLOOR



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AgendaDay2

Tuesday, 4 December 2018 | **Venue:** Crowne Plaza Brussels - Le Palace, rue Gineste 3, 1210 Brussels, Belgium

8.30 – 9.30 *Registration and coffee*

PLENARY SESSION ON THE OMNIBUS REGULATION

9.30 – 9.45 [020101] **Welcome and opening of FI Campus 2018**
 ROOM: PALACE BALLROOM

9.45 – 11.15 [020201] **ESIF/EFSI combination and the further opportunities offered by the Omnibus Regulation**
What next for financial instruments? An introduction to the ESIF/EFSI case studies
 ROOM: PALACE BALLROOM

11.15 – 11.45 *Coffee break*

PARALLEL SESSIONS

11.45 – 12.45 [020301] **Case study session 1**
 Financial instruments for SMEs
 (La Réunion/EquiFund)
 ROOM: PALACE BALLROOM

[020302] **Case study session 2**
 Financial instruments for low carbon
 (CAP TRI/London)
 ROOM: CREATIVITY & EXPLORATION (FIRST
 FLOOR)

[020303] **Case study session 3**
 Financial instruments for urban
 development (Bulgaria)
 ROOM: KLIMT

[020304] **Case study session 4**
 Social EFSI and innovative ESF
 financing instruments
 ROOM: HARMONY (FIRST FLOOR)

12.45 – 14.15 *Networking Lunch*



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AgendaDay2

Tuesday, 4 December 2018 | Venue: Crowne Plaza Brussels - Le Palace, rue Gineste 3, 1210 Brussels, Belgium

PARALLEL SESSIONS

14.15 – 15.15	<p>[020401] Roundtable discussion session 1 Financial instruments for SMEs (La Réunion/EquiFund) <u>ROOM</u>: PALACE BALLROOM</p>	<p>[020402] Roundtable discussion session 2 Financial instruments for low carbon (CAP TRI/London) <u>ROOM</u>: CREATIVITY & EXPLORATION (FIRST FLOOR)</p>	<p>[020403] Roundtable discussion session 3 Financial instruments for urban development (Bulgaria) <u>ROOM</u>: INNOVATION & EVASION (FIRST FLOOR)</p>	<p>[020404] Roundtable discussion session 4 Social EFSI and innovative ESF financing instruments <u>ROOM</u>: HARMONY (FIRST FLOOR)</p>	<p>[020405] Case study session 5 EAFRD Combination of support – Grants and financial instruments (Lombardy) <u>ROOM</u>: KLIMT</p>
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15.15 – 15.45 *Coffee break*

PARALLEL WORKSHOP SESSIONS

15.45 – 17.30	<p>[020501] Workshop session 1 Management verification and audit <u>ROOM</u>: PALACE BALLROOM</p>	<p>[020502] Workshop session 2 <i>fi-compass</i>: taking stock and looking ahead <u>ROOM</u>: CREATIVITY & EXPLORATION (FIRST FLOOR)</p>	<p>[020503] Workshop session 3 State aid <u>ROOM</u>: KLIMT</p>
19.00 – 22.30	<p>[020601] Networking evening programme Walking dinner at Bozar Centre for Fine Arts, 23, rue Ravenstein, 1000 Brussels (room Rotunda Bertouille)</p>		

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AgendaDay3

Wednesday, 5 December 2018 | Venue: Crowne Plaza Brussels - Le Palace, rue Gineste 3, 1210 Brussels, Belgium

8.30 – 9.00 *Arrival and coffee*

PARALLEL PANEL SESSIONS

9.00 – 10.10 [030101] **Financial intermediaries panel session 1**
ESIF debt instruments (loans and guarantees)
[ROOM: PALACE BALLROOM](#)

[030102] **Financial intermediaries panel session 2**
ESIF equity instruments
[ROOM: KLIMT](#)

10.10 – 10.20 *Changeover*

PARALLEL SESSIONS

10.20 – 11.15 [030201] **Case study session 6**
Financial instruments supporting RD&I (MIUR/Occitanie)
[ROOM: CREATIVITY & EXPLORATION \(FIRST FLOOR\)](#)

[030202] **Case study session 7**
NPBIs and multi-sector funds of funds (Hungary/Latvia/Croatia)
[ROOM: PALACE BALLROOM](#)

[030203] **Case study session 8**
ESF student loan financial instrument, Italy
[ROOM: INNOVATION & EVASION \(FIRST FLOOR\)](#)

[030204] **Case study session 9 part 1**
EAFRD ESIF/EFSI combination of support (Nouvelle Aquitaine/Portugal)
[ROOM: KLIMT](#)

[030205] **Case study session 10**
EMFF financial instruments for fisheries and aquaculture (Estonia)
[ROOM: HARMONY \(FIRST FLOOR\)](#)

11.15 – 11.45 *Coffee break*

PARALLEL ROUNDTABLE DISCUSSIONS

11.45 – 12.40 [030301] **Roundtable discussion session 6**
Financial instruments supporting RD&I (MIUR/Occitanie)
[ROOM: CREATIVITY & EXPLORATION \(FIRST FLOOR\)](#)

[030302] **Roundtable discussion session 7**
NPBIs and multi-sector funds of funds (Hungary/Latvia/Croatia)
[ROOM: PALACE BALLROOM](#)

[030303] **Roundtable discussion session 8**
ESF student loan financial instrument, Italy
[ROOM: INNOVATION & EVASION \(FIRST FLOOR\)](#)

[030304] **Case study session 9 part 2**
EAFRD ESIF/EFSI combination of support (Nouvelle Aquitaine/Portugal)
[ROOM: KLIMT](#)

[030305] **Roundtable discussion session 10**
EMFF financial instruments for fisheries and aquaculture (Estonia)
[ROOM: HARMONY \(FIRST FLOOR\)](#)

12.40 – 12.50 *Changeover*

FINAL PLENARY SESSION

12.50 – 13.30 [030401] **Plenary closure of the event**
[ROOM: PALACE BALLROOM](#)

13.30 – 14.30 [030501] *Standing lunch*



Registration

The deadline for registration was Tuesday, 27 November 2018.

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. 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.

How to create your individual learning curriculum at FI Campus 2018?

During **FI Campus 2018**, 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 2018** 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 2018** which you chose during your registration.



Organisational information

3-5 December 2018

The venue

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

[> How to get there](#)

Language

Simultaneous interpretation for a limited number of sessions will be provided.



Detailed information about the sessions

DAY 1

PLENARY, 17.30-19.30

Monday, 3 December 2018

[010101] ROOM: KLIMT AND OPEN SPACE ON THE GROUND FLOOR

Get-to-know and networking session

Facilitators: Nathalie Wergles, Eddy Adams and Tim Wills, *fi-compass* experts

The get-to-know and networking session will be an excellent occasion to meet and exchange with participants around team activities designed for that purpose. You will have the opportunity to discuss in smaller groups and to discover what are the interests of the other participant's vis-à-vis ESIF financial instruments.

[010201] ROOM: PALACE BALLROOM

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

Moderator: Jacki Davis, *fi-compass* expert

Speaker(s):

Eric von Breska, Director, Policy Directorate, Directorate-General for Regional and Urban Policy, European Commission

Simon Barnes, Head of Advisory Services, European Investment Bank

[010301] ROOM: PALACE BALLROOM

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

Moderator: Jacki Davis, *fi-compass* expert

Speaker(s): Stefan Appel, Head of Financial Instruments and International Financial Institutions Relations Unit, Directorate-General for Regional and Urban Policy, European Commission

[010401] ROOM: OPEN SPACE ON THE GROUND FLOOR

Networking cocktail with jazz

The networking cocktail dinner will take place in the Palace Lobby at the Crowne Plaza Brussels.

The evening will be animated by Jazz'n Bossa, a live jazz band with a unique chamber jazz style, characterised by a fresh and tasteful repertoire that is rooted to the great jazz masters.



DAY 2

PLENARY SESSION ON THE OMNIBUS REGULATION, 9.30-11.15

Tuesday, 4 December 2018

[020101] ROOM: PALACE BALLROOM

Welcome and opening of FI Campus 2018

Simultaneous interpretation will be provided between French and English.

Moderators: Jacki Davis and Eddy Adams, *fi-compass* experts

[020201] ROOM: PALACE BALLROOM

ESIF/EFSI combination and the further opportunities offered by the Omnibus Regulation

What next for financial instruments? An introduction to the ESIF/EFSI case studies

Simultaneous interpretation will be provided between French and English.

Moderator: Jacki Davis, *fi-compass* expert

Speaker(s):

Oana Dordain, Policy Officer, Financial Instruments and Relations with International Financial Institutions Unit, DG REGIO, European Commission

Frank Lee, Head of Financial Instruments Advisory Division, *fi-compass* team

The speaker from DG REGIO will present the key changes introduced by the Omnibus Regulation (No. 2018/1046) that affect the implementation of financial instruments. This presentation will describe the new provisions which are intended to simplify the rules for financial instruments, introducing new flexibilities to combine ESIF and EFSI resources.

This will be followed by an overview from the EIB of some of the potential opportunities created by the new flexibilities. The presentation will also include a look forward to future models for investment that utilise the new rules to mobilise additional investment in priority sectors.

The session will conclude with a Q&A and discussion session.



[020301] [020401] ROOM: PALACE BALLROOM

Case study and roundtable sessions 1: financial instruments for SMEs (La Réunion/EquiFund)

Simultaneous interpretation will be provided between French and English.

Moderator: **Bruno Robino**, Head of *fi-compass*

Speaker(s):

Youssef Cadjee, Chargé de mission – Ingénierie financière, Direction des Affaires Économiques, Region La Réunion, France

Emmanuelle Lacaille, Banque Française Commerciale Océan Indien, France

Jean-François Leprince, Financial Instruments – Western Europe, European Investment Bank

George Giakoumakis, Mandate Relationship Manager, European Investment Fund

This session features two different financial instruments that have been set up to use ESIF resources to mobilise EFSI and other funds to support SMEs. The La Réunion financial instrument has been developed to support investment in SMEs in the island through an innovative structure that uses debt and quasi-equity products. The case study will describe the set up of the fund and the key issues that arise in connection with the combination of EFSI and ESIF. The Equifund in Greece is an equity fund set up in Greece to mobilise ESIF, EFSI and significant private investment through three investment windows: innovation, early stage and growth stage. The case study will describe the operation, how it combines ESIF and EFSI and, in particular, the work undertaken to launch the fund and source suitable projects.



[020302] [020402] ROOM: CREATIVITY & EXPLORATION (FIRST FLOOR)

Case study and roundtable sessions 2: financial instruments for low carbon (CAP TRI/London)

Simultaneous interpretation will be provided between French and English.

Moderator: Robert Pernetta, *fi-compass* team

Speaker(s):

Kenroy Quellennec-Reid, Financial Engineering Manager, European Programmes Unit, Greater London Authority, United Kingdom

Joanne Patrick, Principal JESSICA, AMBER Infrastructure Group, United Kingdom (*case study session*)

Peter Radford, Principal, AMBER Infrastructure Group, United Kingdom (*roundtable session*)

Alain Kauffmann, *fi-compass* team

Stéphane Andreani, Direction Europe, Conseiller technique, Région Hauts-de-France, France

Guillaume Thomé, Directeur de Participations, Finorpa Gestion, France

*CAP TRI, the fund set up in Haut de France to support businesses active in the circular economy has been the trailblazer for FIs combining ESIF and EFSI. The financial instrument is now well established in its sector and has been operational for several years. A *fi-compass case study* was published in 2017 describing its set up. This session will follow on from that, describing key lessons learned during the implementation of the fund and highlighting an example of a successful project supported by the fund. The session will also feature the Mayor of London's Energy Efficiency Fund which has been set up by the Greater London Authority. This fund combines ESIF with significant private sector investment (together with, potentially EIB lending) to support energy efficiency in public and private buildings in the capital. The presentation will describe the structure of the fund and the technical assistance support available to support the development of its project pipeline. The speaker will also provide a link to the outputs of the recent MRA RICE project that considered the potential for a multi-regional urban financial instrument.*

[020303] [020403] ROOM: KLIMT

Case study and roundtable sessions 3: financial instruments for urban development (Bulgaria)

Moderator: Emily Smith, Head of Unit - Bilateral Advisory Services, *fi-compass* team

Speaker(s):

Lazar Petrov, Director, Head of Unit Financial Instruments and EU Operational Programmes, Fund Manager of Financial Instruments in Bulgaria

Kamen Slavov, Head of Financial Instruments, Fund Manager of Financial Instruments in Bulgaria

Iva Petkova, Director Department, Sustainable Cities Fund, Bulgaria

Martin Zaimov, Executive Director, Regional Urban Development Fund, Bulgaria

The Urban Development Fund is a financial instrument set up by the Bulgarian Fund Manager of Financial Instruments (FoF) to address the investment needs in municipal buildings, infrastructure and urban regeneration projects in Bulgaria. This fund will aim to combine ESIF and EFSI to support investment in urban areas in the country, including smaller cities. The presentation from the FoF will describe how the fund is structured to combine the different requirements of ESIF and EFSI and then the speakers from the two financial intermediaries selected will share insights from the instrument's implementation.



[020304] [020404] ROOM: HARMONY (FIRST FLOOR)

Case study and roundtable sessions 4: Social EFSI and innovative ESF financing instruments

Moderator: Ando Siitam, *fi-compass* team

Speaker(s):

Philippe Bernard-Treille, Investment Officer, European Investment Fund

Carla Pedro, *fi-compass* expert

Teresa Bomba, *fi-compass* expert

Susanna Longo, European Project Management and Policy Officer, Finpiemonte, Italy

*This session presentations offer conference participants an opportunity to learn from the EIF's activities in the field of social impact and get an overview of specific EFSI instruments in action. *fi-compass* experts will present a study on how to set up outcome payment mechanisms with ESF, based on the Portuguese experience of Portugal Social Innovation Initiative and its Social Impact Bonds programme. The speaker from Italy will share their journey to develop a concrete Social Impact Bond project and how ESF resources could be into it. There will be a short Q&A at the end of the session and further interaction with the speakers (also for conference participants that don't attend the presentation) is assured via roundtable discussion in the follow-up session after lunch.*

[020405] ROOM: KLIMT

Case study session 5: EAFRD combination of support – Grants and financial instruments (Lombardy), only one session at 14.15-15.15

Simultaneous interpretation will be provided between Italian and English.

Moderator: Mario Guido, *fi-compass* team

Speakers:

Petr Lapka, Deputy Head of Unit, DG Agriculture and Rural Development, European Commission

Paolo Zaggia, Financial Products and Services Directorate, Finlombarda, Italy

Stefania Stea, Products and Services Directorate, Finlombarda, Italy

The session will analyse the possibilities for combining grants and financial instruments under the EAFRD and how the Omnibus regulation has enhanced such opportunities. After an introduction from DG AGRI on the key regulatory provisions, representatives from Finlombarda, the in-house promotional agency of Lombardy Region, will deliver a presentation which will describe the financial instruments under its management, the "Credit Fund for rural development". Particularly, the combination of the loan scheme with grant support will be under the spotlight. This will be followed by a thematic discussion with open questions.



PARALLEL WORKSHOP SESSIONS, 15.45-17.30

Tuesday, 4 December 2018

[020501] ROOM: PALACE BALLROOM

Workshop session 1: Management verification and audit

Simultaneous interpretation will be provided between French and English.

Moderator: Eddy Adams, *fi-compass* expert

Speaker(s):

Rafael Lopez Sanchez, Deputy Head of Unit C.1 – Coordination, relations with the Court of Auditors and OLAF, Directorate-General for Regional and Urban Policy, European Commission

Vladislava Glietz, Team leader for audit methodology, Unit C.1 – Coordination, relations with the Court of Auditors and OLAF, Directorate-General for Regional and Urban Policy, European Commission

In this workshop, the Commission representatives will present the main aspects of management verification and audit for ESIF financial instruments. This will include also a look ahead to the new audit methodology.

Participants will have the opportunity to ask their questions about audit and control of financial instruments and share their inputs in a comprehensive Q&A session.

[020502] ROOM: CREATIVITY & EXPLORATION (FIRST FLOOR)

Workshop session 2: *fi-compass*: taking stock and looking ahead

Moderator: Jacki Davis, *fi-compass* expert

Speaker(s):

Emily Smith, Head of Unit - Bilateral Advisory Services, *fi-compass* team

[020503] ROOM: KLIMT

Workshop session 3: State aid

Moderator: Frank Lee, Head of Financial Instruments Advisory Division, *fi-compass* team

Speaker(s):

Martin Polónyi, Director of the Financial Instruments and International Institutions Unit, Ministry of Finance of the Slovak Republic

Desmond Gardner, *fi-compass* team

*In May/June 2018, at the request of the European Commission Services, *fi-compass* undertook a survey of managing authorities and intermediate bodies of their experience of implementing financial instruments within the existing State aid rules. This workshop will allow participants to engage with representatives from the European Commission to discuss the key findings of the survey, consider the technical requirements behind some of the key issues and to identify key State aid challenges for FIs, together with the current ways in which challenges are addressed and future needs for support and guidance.*



NETWORKING EVENING, 19.00-22.30

Tuesday, 4 December 2018

[020601]

Networking evening programme

Walking dinner at Bozar Centre for Fine Arts, 23, rue Ravenstein, 1000 Brussels (room Rotunda Bertouille).

DAY 3

PARALLEL PANEL SESSIONS, 9.00-10.10

Wednesday, 5 December 2018

[030101] ROOM: PALACE BALLROOM

Simultaneous interpretation will be provided between French and English.

Financial intermediaries panel session 1 - ESIF debt instruments (loans and guarantees)

Moderator: Frank Lee, Head of Financial Instruments Advisory Division, *fi-compass* team

Speaker(s):

Dina Ferreira, Managing Director of IFRRU, Portugal

Mark Scicluna Bartoli, Executive – EU & Institutional Affairs, Bank of Valletta, Malta

Madis Reinup, Member of the Management Board, Rural Development Foundation in Estonia

This session will allow participants to hear from practitioners from financial intermediaries and fund of funds managers who are managing debt and guarantee financial instruments. The session will be interactive with opportunities for participants to engage with the panel to ask questions and share their experiences during the session.

[030102] ROOM: KLIMT

Financial intermediaries panel session 2 - ESIF equity instruments

Moderator: Bruno Robino, Head of *fi-compass*

Speaker(s):

Luigi Amati, Chairman, META Group, Italy

Alexandre Scherer, Investment Director, M Capital Partners, France

József Török, Director of Business Development & Startup Investments, Széchenyi Venture Capital Management, Hungary

Participants of this session have the opportunity to better understand key aspects of equity financial instrument implementation from the angle of financial intermediaries. The session will be interactive with opportunities for participants to engage with the panel to ask questions and share their experiences during the session.



PARALLEL SESSIONS ON CASE STUDIES, 10.20-11.15 AND 11.45-12.40

Wednesday, 5 December 2018

[030201] [030301] ROOM: CREATIVITY & EXPLORATION (FIRST FLOOR)

Case study and roundtable sessions 6: financial instruments supporting RD&I (MIUR/Occitanie)

Moderator: Bruno Robino, Head of *fi-compass*

Speaker(s):

Maurizio Guglielmini, Key Financial Manager, RIF team, Equiter, Italy

Andrea Bua, Head of Unit, Operations Departments, European Investment Bank

Paola Del Fabro, Responsible for the Fondo Ricerca & Innovazione, Banco di Sardegna, Italy

Stéphane Molinier, Directeur Général Délégué, La Région Occitanie, France

The MIUR financial instrument is aimed at financing new research development and innovation (RD&I) projects in the south of Italy, through a combination of ESIF, EIB (partly under EFSI) and other public and private resources. The representatives of the fund manager/financial intermediaries directly involved in the ERDF funded financial instrument for RD&I support (TO 1) will present to participants the current status of the financial instrument. The speakers will focus on the challenges of financing RD&I through ERDF financial instruments and the lessons learnt how to deploy a debt instrument to support research, development and innovation. The Occitanie region has a long tradition of the use of financial instruments to support innovative SMEs. Representatives from the managing authority and the EIF will present their experience of supporting innovation through financial instruments.

[030202] [030302] ROOM: PALACE BALLROOM

Case study and roundtable sessions 7: NPBIs and multi-sector funds of funds (Hungary/Latvia/Croatia)

Moderator: Emily Smith, Head of Unit - Bilateral Advisory Services, *fi-compass* team

Speaker(s):

Cecília Gyalog, Director, EU Coordination Directorate, MFB Hungarian Development Bank

Juris Vaskāns, Member of the Board of Directors, Altum, Latvia

Marina Marasović, Managing Director, EU Funds and Financial Instruments, Croatian Bank for Reconstruction and Development (HBOR)

The Croatian Bank for Reconstruction and Development (HBOR), MFB Hungarian Development Bank and Altum are examples of national promotional banks and institutions (NPBIs) acting as multi-sector funds of funds for ESIF financial instruments 2014-2020. This session will focus on the role of NPBIs in the deployment of such instruments, taking into consideration the different implementation options. Speakers will discuss their practical challenges, lessons learnt and well as how to foster collaboration with managing authorities as well as financial intermediaries.



[030203] [030303] ROOM: INNOVATION & EVASION (FIRST FLOOR)

Case study and roundtable sessions 8: ESF student loan financial instrument, Italy

Moderator: Ando Siitam, *fi-compass* team

Speaker(s):

Anna Maria Fontana, Manager in charge of Financial Instruments, Agenzia per la Coesione Territoriale, Italy

Daniele Alfonsi, *fi-compass* team

Alessandro Apa, Senior Fund and Structuring Officer, European Investment Bank

Francesco Gargani, Associate Partner, PwC, Italy (*roundtable discussion*)

This case study session offers participants an opportunity to learn from the first European Social Fund co-funded financial instrument investing in education (thematic objective 10) by providing student loans in Italy. Representatives of the Italian Cohesion Agency and the fund of funds manager as well as experts involved in the ex-ante assessment will share their experience in the design and set up of the financial instrument. There will be a short Q&A after the presentation and further interaction with the experts (also for conference participants that don't attend the presentation) is assured via separate roundtable discussion.

[030204] ROOM: KLIMT

Case study session 9, part 1: EAFRD ESIF/EFSI combination of support (Nouvelle Aquitaine/Portugal), 10.20-11.15

Simultaneous interpretation will be provided between French and English.

Moderator: Mario Guido, *fi-compass* team

Speakers:

Michael Pielke, Head of Unit F.3, DG Agriculture and Rural Development, European Commission

Lise Chaumont, Direction de l'agriculture, de l'agroalimentaire et de la pêche (région Nouvelle-Aquitaine), France

Gabriela Freitas, Managing Authority PDR2020, Portugal

This session will explore the opportunities of combining the EAFRD with the EFSI support. After the introduction from DG AGRI on the novelties of the Omnibus regulation, the floor will be given to representatives of the Nouvelle-Aquitaine Region who will deliver on the set-up of a financial instrument in the Region.

*The presentation will inform the participants about the envisaged structure of the financial instrument and about the support received by the managing authority from the *fi-compass* advisory platform. The Portuguese managing authority will then present its experience on financial instruments under the EAFRD in the current programming period, touching upon the process that is leading the managing authority to the set-up of the financial instrument. The presentations will be followed by questions and answers.*



[030304] ROOM: KLIMT

Case study session 9, part 2: EAFRD ESIF/EFSI combination of support (Nouvelle Aquitaine/Portugal), 11.45-12.40

Simultaneous interpretation will be provided between French and English.

Moderator: **Mario Guido**, *fi-compass* team

Speaker:

Michael Pielke, Head of Unit F.3, DG Agriculture and Rural Development, European Commission

Lise Chaumond, Direction de l'agriculture, de l'agroalimentaire et de la pêche (région Nouvelle-Aquitaine), France

Gabriela Freitas, Managing Authority PDR2020, Portugal

Alessandro Gargani, Business Development and Mandate Manager, European Investment Fund

This session is a continuation of the previous one. The representative from the EIF will discuss the process to select financial intermediaries, as well as the envisaged implementation of the financial instruments. The presentation will be followed by a panel discussion which will involve all the speakers and will allow the Omnibus novelties, including the opportunities of combining the EAFRD with the EFSI support, to be further elaborated on. Participants will have the opportunity to exchange views with the speakers and experts.

[030205] [030305] ROOM: HARMONY (FIRST FLOOR)

Case study and roundtable sessions 10: EMFF financial instruments for fisheries and aquaculture (Estonia)

Moderator: **Eddy Adams**, *fi-compass* expert

Speaker(s):

Eduard Koitmaa, Ministry of Rural Affairs of the Republic of Estonia, Fisheries Economics Department, Market Regulation and Trade Bureau, Managing Authority of EMFF OP

Madis Reinup, Member of the Board, Rural Development Foundation, Estonia

Mart Undrest, Association of Estonian Fish Producer Organizations

*The objective of this session is to provide the participants with experience with implementing in practice financial instruments under the EMFF for fisheries and Aquaculture. As Estonia is a pioneer in this sector, representatives from the managing authority and the body implementing the financial instrument will speak about their experience with European Maritime and Fisheries Fund (EMFF) financial instruments over the two programming periods, with specific focus on the 2014-2020 period financial instruments. Speakers will take participants through the process of establishing the financial instrument and will describe different life cycle phases, analysing the essential practical aspects and key challenges, lessons learned, results achieved and plans for reusing the repayments from the instrument from the 2007-2013 period. In addition, a representative from a final recipient company currently building a new fish processing factory with support provided through the EMFF financial instrument will share his experience with the EMFF financial instruments. The *fi-compass* video case study on Estonia's FI for Aquaculture and Fisheries will be shown.*

The topic of the Roundtable session on EMFF Financial instruments is intended to bring together stakeholders involved in the EMFF financial instruments or interested in that to discuss their experiences/challenges related to using EMFF financial instruments. Participants can freely circulate to exchange views with the experts and each other.



FINAL PLENARY SESSION, 12.50-13.30

Wednesday, 5 December 2018

[030401] ROOM: PALACE BALLROOM

Plenary closure of the event

Simultaneous interpretation will be provided between French and English.

Moderator: Eddy Adams, *fi-compass* expert

Speaker(s):

Jonathan Denness, Head of Unit - Head of the Competence Centre Closure and Major Projects, Directorate-General for Regional and Urban Policy, European Commission



For inspiration, we encourage you to watch our event overview video from FI Campus 2017:



#ficompass

Last update, November 2018

www.fi-compass.eu
contact@fi-compass.eu
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European Commission
Directorate-General
Regional and Urban Policy
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