



fi-compass - an introduction

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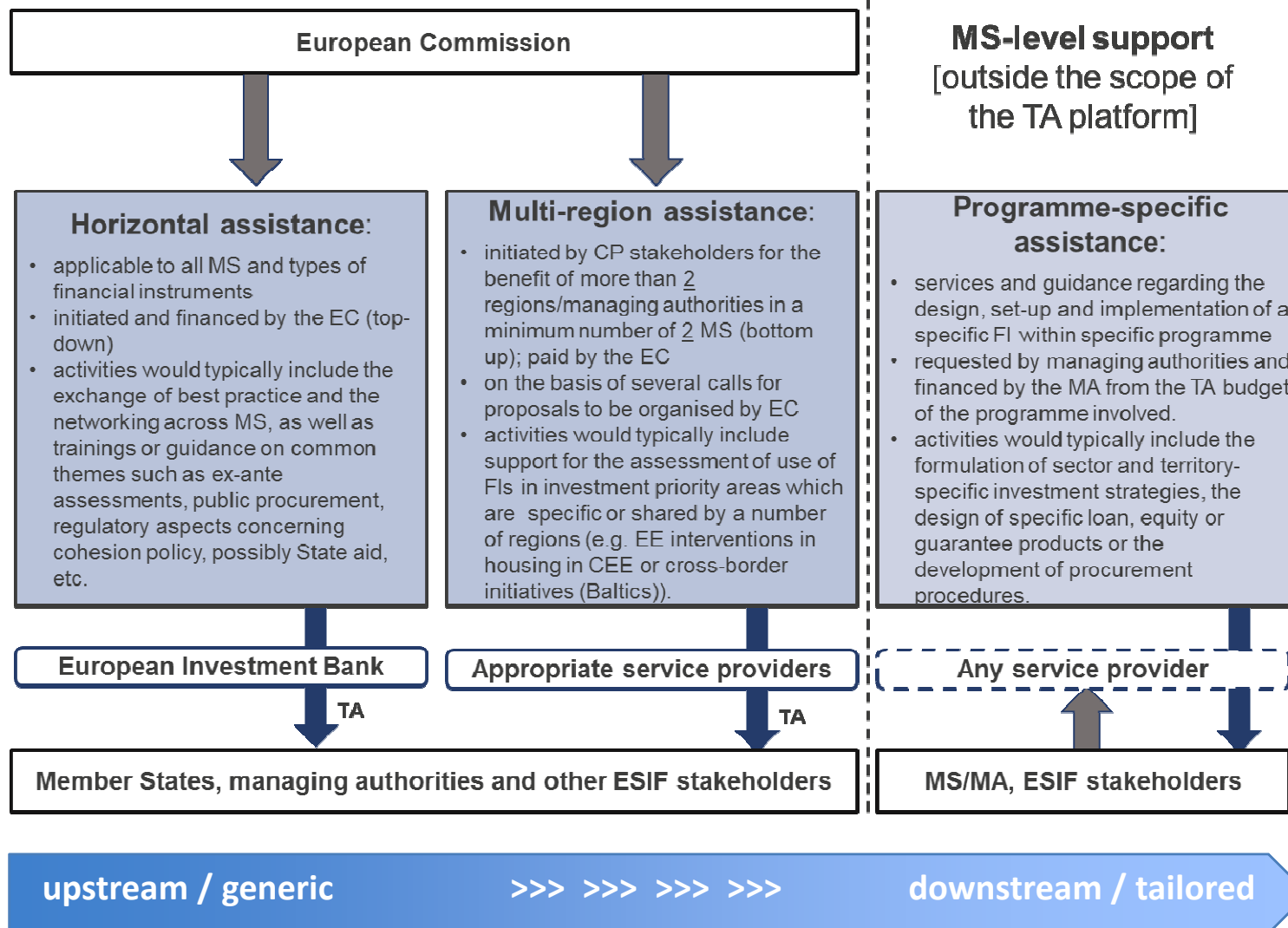
Head of *fi-compass* Advisory Services,
European Investment Bank



Reminder: fi-compass is designed as a catalyst



Two forms of assistance delivery under *fi-compass*



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.*

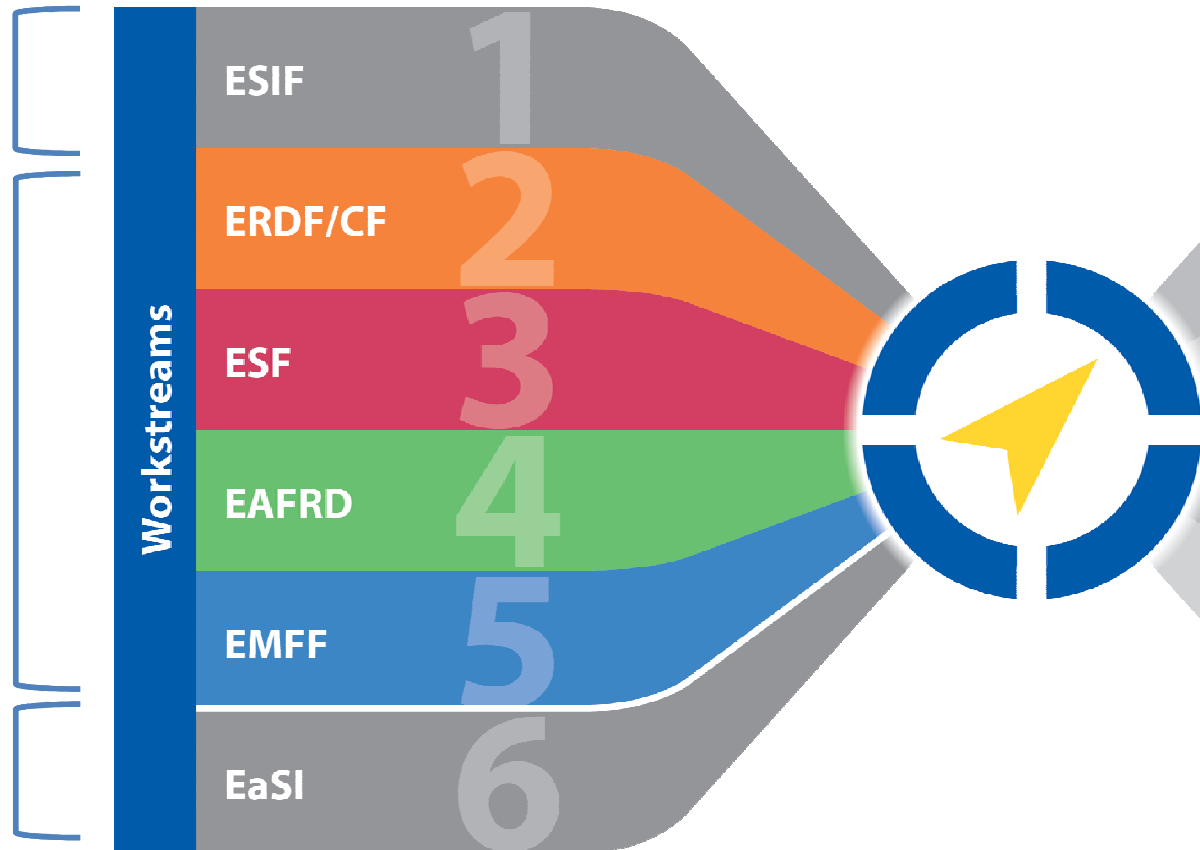
How is *fi-compass* delivery structured?



Awareness raising on ESIF FI
General advice regarding ESIF
common framework & FI lifecycle

ESI Fund-specific advice, taking
into account past FI experiences
(if any), Fund-specific rules,
sector needs and final recipients
profiles

Continuation of JASMINE
microfinance support 2007-13



Distinct *fi-compass* work streams

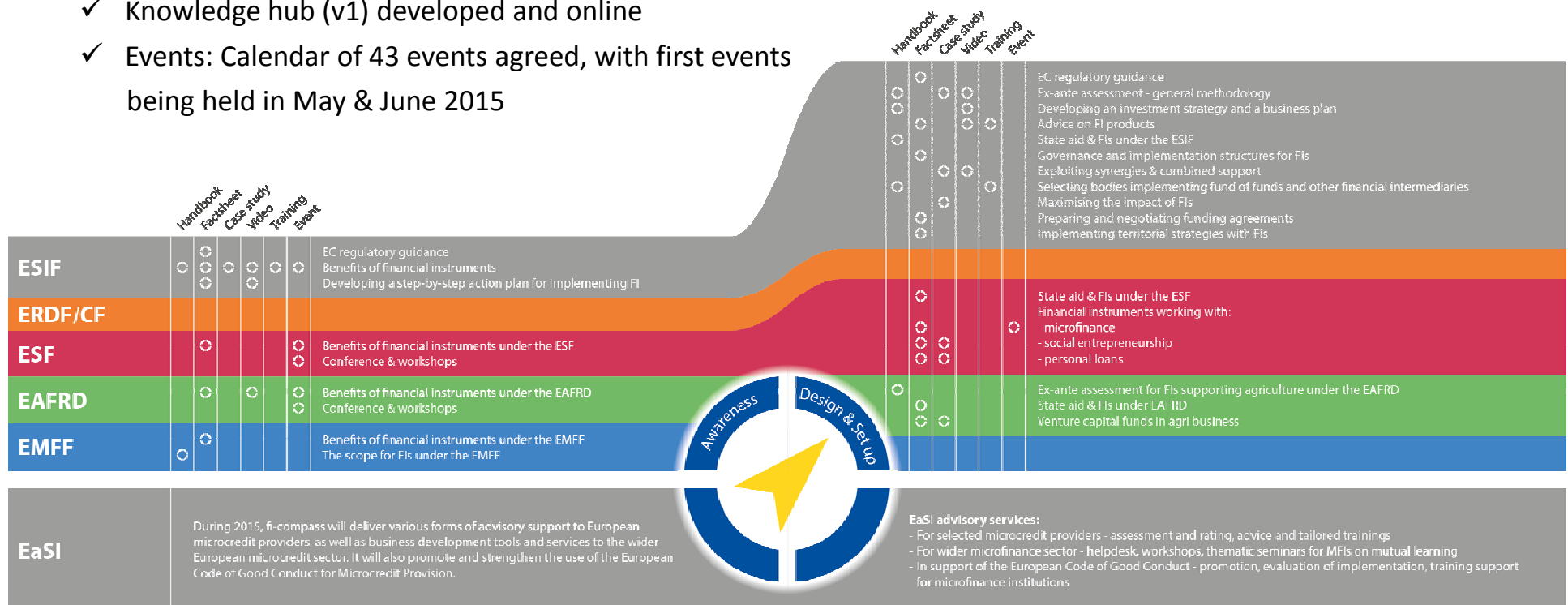
Where do we stand?

May/June 2015



Status update

- ✓ Formal programme launch in Jan 2015
- ✓ First info brochures, case studies, EC Guidance 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 **EAFRD** & **EMFF** advisory products under way
- ✓ Audio-visual (learning) material in the making
- ✓ Knowledge hub (v1) developed and online
- ✓ Events: Calendar of 43 events agreed, with first events being held in May & June 2015



fi-compass knowledge hub - single entry point



The image displays two screenshots of the fi-compass website. The left screenshot shows the homepage with a large banner titled "Looking for your way?" and a navigation menu. The right screenshot shows a detailed view of the homepage with sections for Search, Upcoming Events, News, Latest Resources, and Video.

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

fi-compass

00:11

iiiiii [VID](#) [vimeo](#)

www.fi-compass.eu

fi-compass newsletter #1: <http://www.fi-compass.eu/content/beacon-april-2015-7>

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; EAFRD; ESF); series of 3 events for each ESI-Fund in different EU locations, up to 100-120 participants
 - Member State-specific events (ESIF general tbc)); 26-28 events; 1 per MS, up to 80 participants
- **Registration to be gradually opened on *fi-compass* website**





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
 - Riga, 29 October 2015 (tbc)
 - Vienna, 1 Vienna 2015
 - Barcelona, 20 November 2015

Member State-specific events

- Paris, 24 September 2015
- Bratislava, 2 October 2015
- Sofia, 6 October 2015 (tbc)
- Bucharest, 8 October 2015
- Rome, 22 October 2015
- Riga, 30 October 2015

Member State-specific events

- Warsaw, 5 November 2015
- Prague, 10 November 2015 (tbc)
- Madrid, 18 November 2015
- 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)
- Vienna, 8 March 2016 (tbc)
- Budapest, 10 March 2016
- Tallinn, 15 March 2016
- Vilnius, 17 March 2016
- Helsinki, 7 April 2016

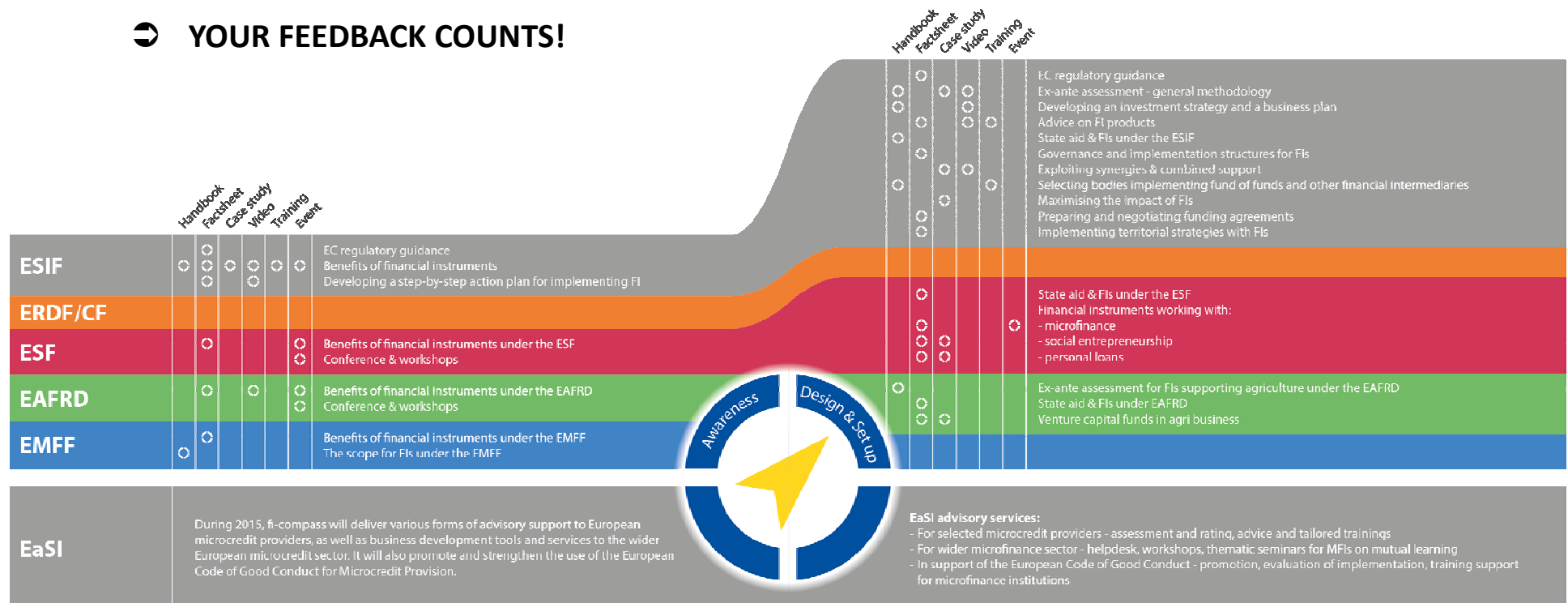
What's next?

May/June 2015



Next steps

- ➔ Continuously develop knowledge hub functionalities, social media presence and quarterly newsletter
- ➔ Preparation and delivery of all fi-compass events 2015/16
- ➔ Launch **EaSI TA** (microfinance) component in May/June 2015
- ➔ Kick-off **ESF** work programme in May/June 2015
- ➔ Step-up communication activities > more active stakeholder engagement
- ➔ Elaborate mid- to long-term capacity building strategy (with first pilot activities); subsequent roll-out
- ➔ Start work programme development 2016-17 in Q3 2015
- ➔ **YOUR FEEDBACK COUNTS!**





Thank you

www.fi-compass.eu

