

# fi-compass – an introduction

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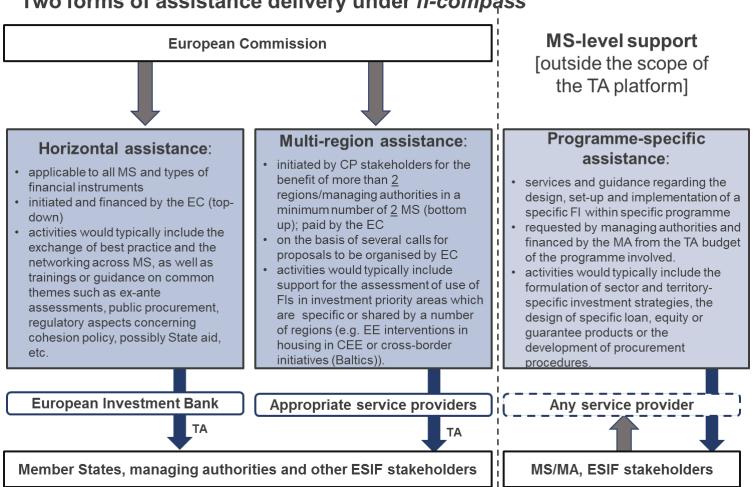




## Reminder: fi-compass is designed as a catalyst



#### 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.

▶ <u>fi-compass offers:</u> 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

► <u>fi-compass offers:</u> 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.

▶ <u>fi-compass offers:</u> 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.

<u>fi-compass offers:</u> Knowledge Management Hub (web portal), Newsletters, FAQ, specific publications, etc.

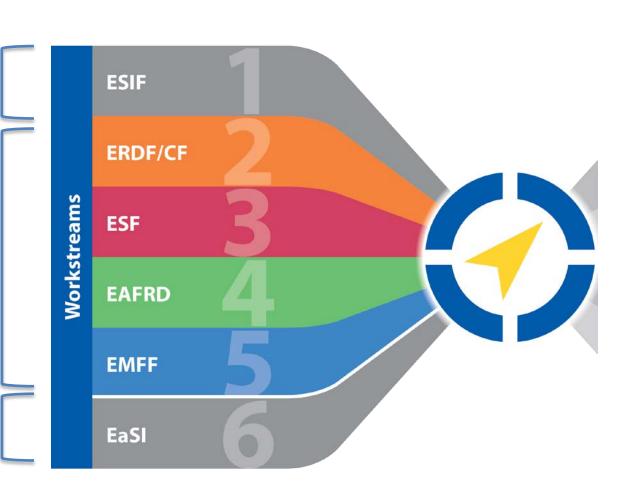
## How is *fi-compass* delivery structured?



Awareness raising on ESIF FI
General advice regarding ESIF
common framework & FI life cycle

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?



#### **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

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ERDF/CF											
ESF		0				00	Benefits of financial instruments under the ESF Conference & workshops				
EAFRD		0		0		00	Benefits of financial instruments under the EAFRD Conference & workshops				
EMFF	o	0		Ī	Ī		Benefits of financial instruments under the EMFF The scope for FIs under the EMFF				

#### **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 advisory needs to inform the development of subsequent products and tools

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of Set up	0	^					Ex-ante assessment for FIs supporting agriculture under the EAFRD State aid & FIs under EAFRD	
		0 000	00			0	State aid & FIs under the ESF Financial instruments working with: - microfinance - social entrepreneurship - personal loans	
.0	0	0 0 00	0	000 0	0		EC regulatory guidance Ex-ante assessment - general methodology Developing an investment strategy and a business plan Advice on FI products State aid & FIs under the ESIF Governance and implementation structures for FIs Exploiting synergies & combined support Selecting bodies implementing fund of funds and other financial intermediaries Maximising the impact of FIs Preparing and negotiating funding agreements Implementing territorial strategies with FIs	

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

## 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); 1 per MS, up to 80 participants
- Registration to be gradually opened on *fi-compass* website



















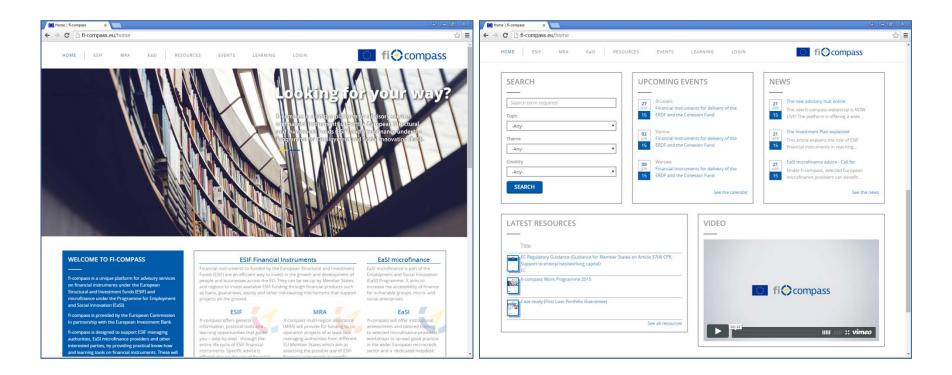






# fi-compass knowledge hub - single entry point





## www.fi-compass.eu

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

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



### Thank you

www.fi-compass.eu



