

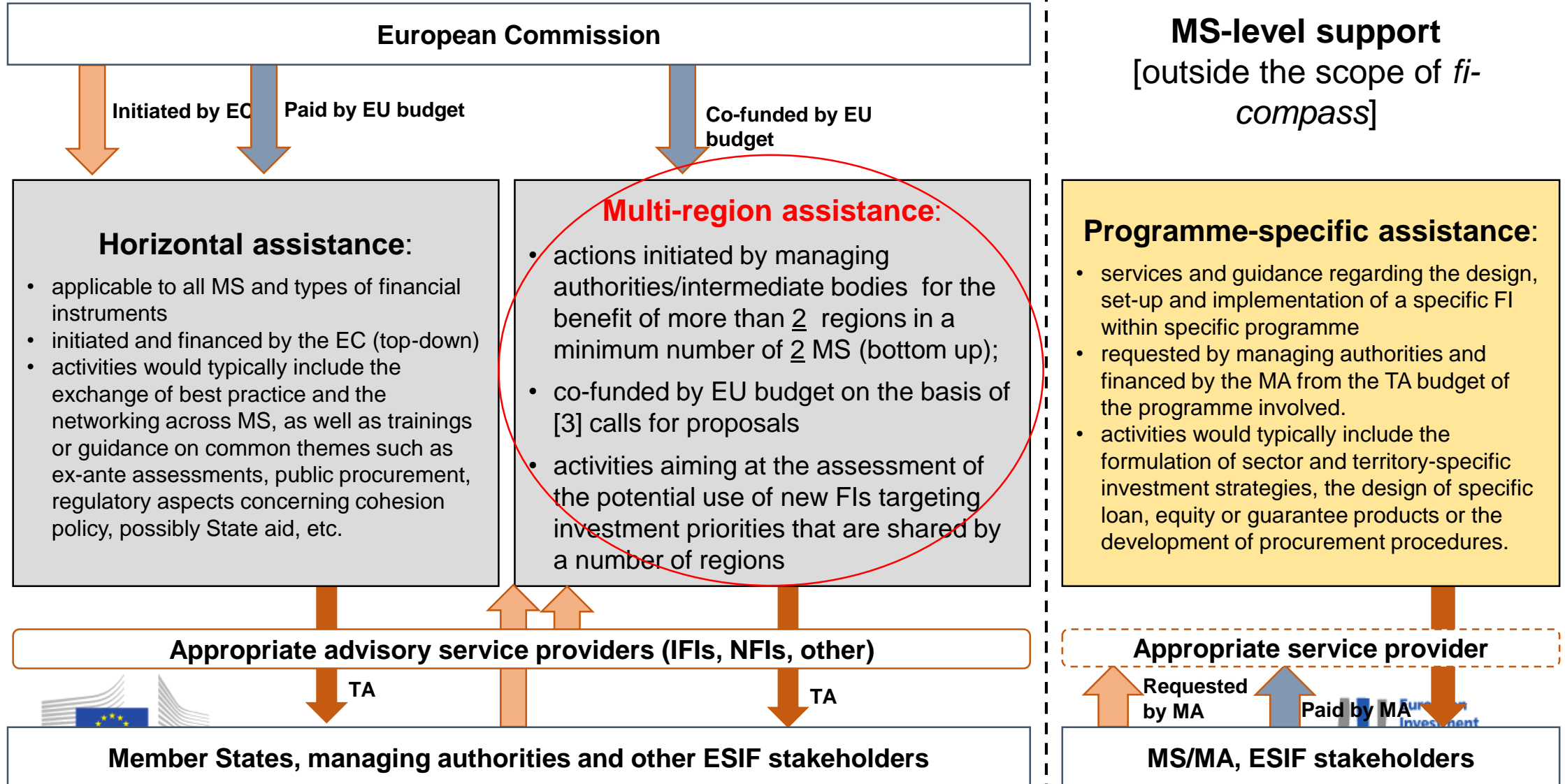


***fi-compass* and EIB Advisory initiatives supporting social economy**

**Eugenio Saba**, *fi-compass* team,  
European Investment Bank



# Two forms of assistance delivery under *fi-compass*



# fi-compass in a nutshell



*A joint EC – EIB Group initiative to promote financial instruments*

*In the EIB, it is part of the Advisory Services and operates alongside and in coordination with other initiatives.*

## Step-by-step process guidance

throughout the entire FI life cycle, consistent with regulatory provisions, evidence-based practice and the realities of ESIF MAs.

## Learning opportunities

to further the necessary understanding and skills in the market (studies, case studies, factsheets, videos, etc.).

## Targeted awareness raising and networking

for MAs, the general public, potential bodies implementing FIs, private and public investors interested in co-investing, enterprises or for other potential final recipients.

## Access to a single knowledge hub

to ensure (timely and targeted) availability of information and advice (FIs in my country, news and publications).

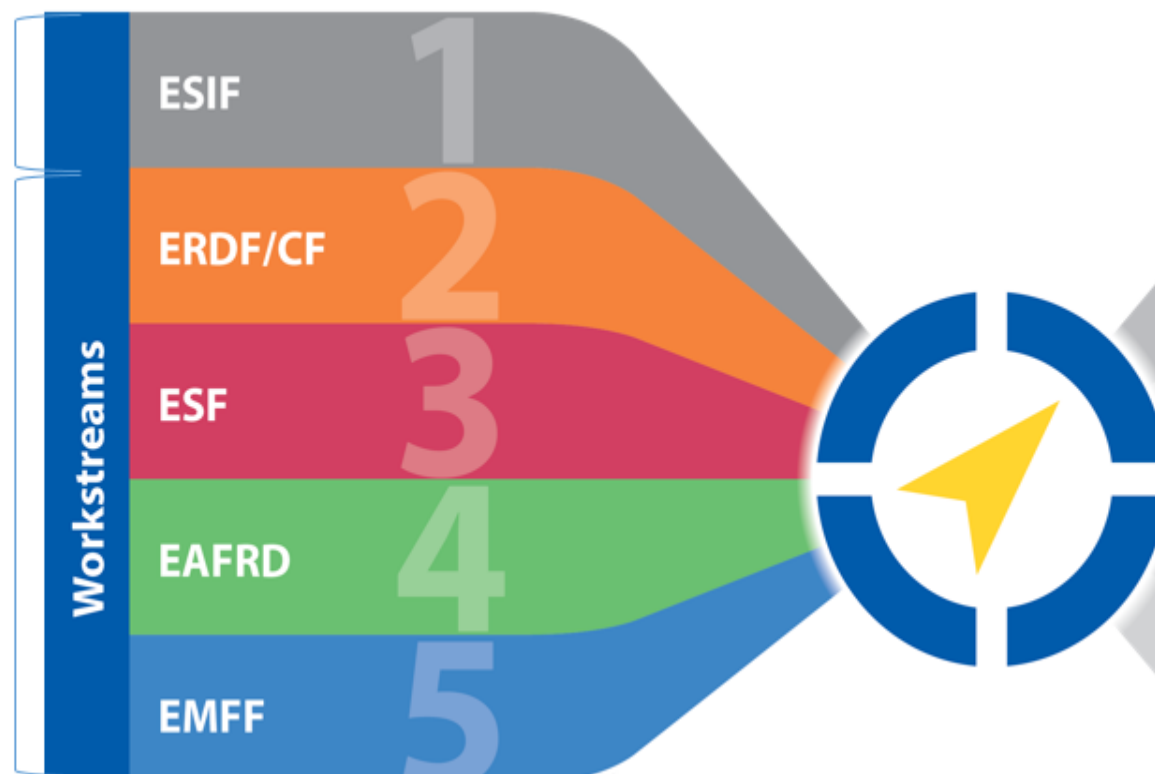


# How is *fi-compass* delivery structured?



Awareness raising on ESIF FI  
General advice regarding  
ESIF common framework  
and FIs lifecycle

ESI Fund-specific advice,  
taking into account past  
FIs experiences, Fund-  
specific rules, sector  
needs and final recipients  
profiles



# fi-compass activities in the social domain (ESF workstream)



**Manuals and factsheets:**  
**Microfinance, Personal loans, Social entrepreneurship**



**Survey to MAs and ESF stakeholders**

**Communities of Practice will follow**

## Awareness raising events across Europe

- **Multiregional events**
- **Thematic workshops**
- **EU level flagship conferences**



**Case studies**

## Capacity Building Services

**(basic modules and advanced modules)**





# fi-compass learning and communication

- Learning videos
- Video case studies
- Short video testimonials
- Event videos
- Beacon newsletter
- Social media activity (LinkedIn, Twitter, YouTube)

## fi-compass video gallery



European Commission

### Latest videos

14.12.2018

**Final recipient's perspective on support received through ESIF equity financial instruments – short interview with Nora Blum, Selfapy, Germany**  
Video testimonial recorded at the *fi-compass* event 'Financial intermediaries and equity financial instruments – Working with managing authorities on ESIF equity instruments', 15-16 October 2018, Berlin.



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### Financial instruments success stories

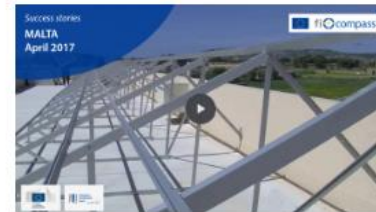
These videos from *fi-compass* show how financial instruments are being implemented around the EU.



Energy efficiency loans for Lithuanian homes



Financial Instruments within the European Social Fund (ESF) in Italy - SELFIEmployment



Financial instruments success stories: Experiences from Malta

[See all the success stories](#)

### Learning videos

The *fi-compass* learning videos are providing both general and technical advice about using ESIF financial instruments.



Capacity Building Services for the European Social Fund financial instruments



Financial instruments products



Developing an action plan for ESIF financial instruments

[See all the learning videos](#)

### Events videos

Videos on this playlist feature summaries of different *fi-compass* events covering different ESI Funds and countries. They include interviews with people involved in ESIF financial instruments.



FI Campus 2018 – Summary video



Fourth annual EU conference on EAFRD financial instruments for agriculture and rural development



Second *fi-compass* ESF Conference 'Financial instruments funded by the European Social Fund – boosting social impact', 8 – 9 March 2018, Brussels

# Country pages - new feature on the *fi-compass* website



Data on financial instruments from the Cohesion Policy Open Data Platform

*fi-compass* Country pages for all 28 Member States

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## Financial instruments in your country

In this section, you can find information about the state of play of the European Structural and Investment Fund financial instruments and relevant resources related to each country. Use the map below to select your country's page.

See the European Commission's website for data about the ESIF financial instruments in your country. The European Commission's dataset provides cumulative financial information on the different financial instruments supported by each specific ESI Fund programme during the 2014-2020 programming period.

Financial instrument data from the European Commission per country  
Interactive map  
EU facts and figures  
EU financial instruments

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## Italy facts and figures

(data from before 01.01.2018)

	ERDF	ESF	EAFRD	EMFF	CF
Total active financial instruments (2014-2020)	44	4	7	n/a	n/a
Total contributions to financial instruments (€ million)	1 695.02	142.99	89.20	n/a	n/a

(Source: Cohesion Policy Open Data Platform)

Financial instrument data from the European Commission per country  
Italy facts and figures  
Features  
Italy financial instruments  
Relevant resources  
Videos  
Publications  
Events

### Features

- The Multi-region assistance programme (MRA)**  
Discover the newly launched microsite dedicated to the Multi-region assistance (MRA) programme under fi-compass. The aim? To facilitate a broader use of financial instruments both in terms...
- The FIRECE project - fi-compass support for energy efficiency and renewable energy financial instruments**  
On 17-18th January 2019, fi-compass delivered a workshop for managing authorities and other stakeholders from the FIRECE project. This project, which is being undertaken under the Interreg...

## Italy financial instruments

Funds:  Thematic objective:

- AGRI Italy Platform
- AGRI Italy Platform
- AGRI Italy Platform
- Aiuti agli investimenti in forma di microcredito - Fondo microcredito
- Aiuti agli investimenti produttivi per progetti strategici (territoriali, settoriali, di filiera) Fondo rotativo
- CONFIDI
- Contributo congiunto garanzia e interessi
- Fondo Credito
- FONDO DI CAPITALE DI RISCHIO (VENTURE CAPITAL) PER INVESTIMENTI IN EQUITY PER LA CREAZIONE E LO SVILUPPO DI IMPRESE INNOVATIVE
- FONDO DI COMPETITIVITA' DELLE IMPRESE

1 2 3 4 5 6 ... LAST

### Relevant resources

Videos

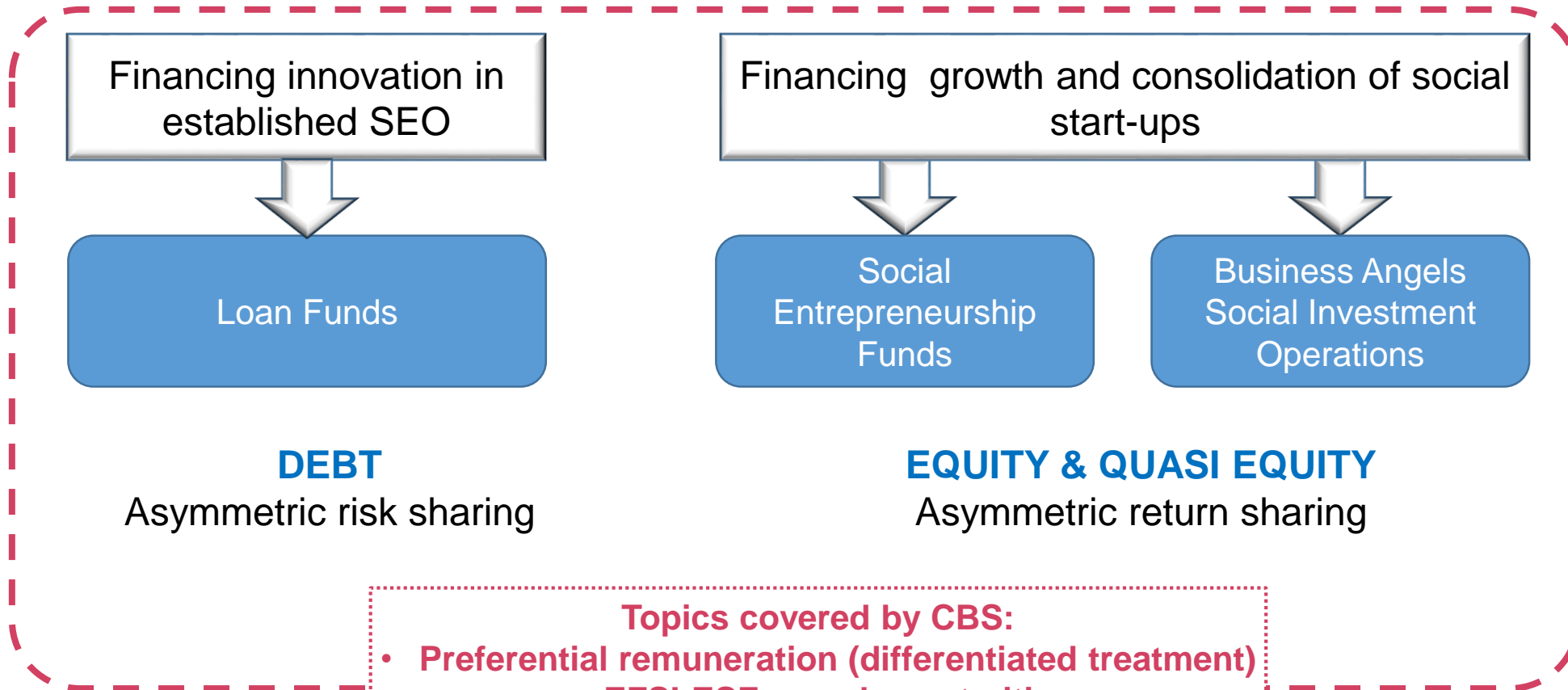
Q&A



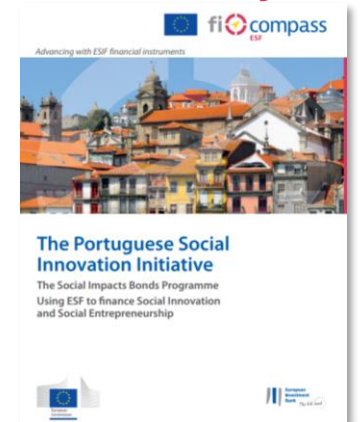
# CBS example: Portugal



## Portugal Inovação Social Initiative



It has become a Case Study!





# Furthering MAs' and stakeholders' engagement



How to fully exploit the potential of ESF financial instruments for social impact?



 #ficompass



# MAs engagement (1)



## Capacity Building Services

*ask for tailored assistance!*

CBS can provide tangible support in getting your FIs going, also by removing bottlenecks to FIs implementation.



We need your feedback! Web-based [survey on the use of FIs under ESF](#) – challenges and needs for support.



Survey on financial instruments under European Social Fund (ESF).  
Reflections at present and ideas for future

The European Commission, Directorate-General for Employment, Social Affairs and Inclusion (DG EMPL) and the European Investment Bank (*fi-compass*) are carrying out a survey on ESF Managing Authorities and stakeholders, aiming to receive their feedbacks on present experiences on financial instruments (FIs) under European Social Fund (ESF), in addition to collecting future views and suggestions.

In this context, we share with you a short [online questionnaire](#):

[Go to questionnaire](#)

## Communities of Practice

*Assisted peer-to-peer working communities*

According to the Survey's feedback, MAs and ESF stakeholders can work and exchange on a peer-to-peer level on specific topics, assisted by EC, EIB and sectorial experts.



# MAs engagement (2)



Other upcoming [fi-compass](#) activities engaging ESF MAs:

- Thematic workshop on **Social Innovation and Entrepreneurship**  
**Lisbon, 10 September 2019.**
- Thematic workshop on **Student loans**  
**Autumn 2019, venue *tbd.***



