



## **The FDATA Open Finance Summit 2019**

Wednesday 4th and Thursday 5th December 2019  
**McEwan Hall, Edinburgh**

and

## **The FDATA Open Finance Awards 2019**

Thursday 5th December 2019  
**The National Museum of Scotland, Edinburgh**

## **Sponsor Prospectus**

## Who is FDATA Global?

*The Financial Data and Technology Association (FDATA) is a trade association.*

Open Finance presents a 'once in a generation' opportunity to ensure that every one of us can leverage our own data to make better decisions and take fuller control of our financial lives.

As a sector, we have a unique opportunity, and responsibility in equal measure, to deliver a revolution in financial services and to ensure that Consumer best interests are firmly at the very heart of this movement in the UK and around the world.

FDATA Global, with Chapters now in Europe, North America, Australia & New Zealand and Asia, (coming soon - Africa and South America), is a truly Global Association of like-minded businesses with a common Mission. That Mission is to ensure that all consumers, including the most vulnerable, have the right to access the best and most affordable financial products to suit their personal circumstances and aspirations.

## The FDATA Global Open Finance Summit

The Summit will bring together regulators and policy makers from around the world to discuss how we're going to deliver Open Finance, collaborate on standards and set the agenda for best practice. This event is about influencing the decision makers and regulators and establishing the tone for the Open Finance movement globally.

### The key themes are:

- The Customer Data Right and Open Finance - where are we going and why?
- Customer Betterment and use cases
- International Overview of Open Finance
- Protecting the Customer and Protecting the Ecosystem
- Data Ethics, Codes of Conduct and AI frameworks
- AI space. Algorithms and ethics – need to mainstream more for this year. Making informed decisions, value exchange etc.
- Designing Adequate Regulation
- Data Sandboxes, Regulatory Sandboxes and Test Environments
- Identity and Customer Experience
- Architecture, Systems Design, Security and Standards
- Open Finance Implementation, Conformance, Performance and KPIs

### Who will be there?

This is a must attend Summit for anyone interested in helping to shape the movement in the UK and internationally. It is a forum like no other, as Regulators and Policy makers come together, alongside senior representatives from Financial Services Companies, Advisers and suppliers, to explore how to work together more effectively and deliver Open Finance more efficiently.

## **FDATA 2nd Annual Global Open Finance Awards**

These Awards have been established to recognise those organisations and institutions that are actively establishing policies and delivering innovations that empower customers to leverage their financial data, so that they can make better decisions and take fuller control of their financial lives. Awards will be handed to those Organisations that can demonstrate that the work they are doing to deliver open finance to their clients and consumers is being done in the best interest of those that it directly affects.

### **Categories**

1. Most innovative new product feature using account aggregation as a force for making consumer lives better
2. lives better
3. Best new innovation in consumer savings or wealth journey using account aggregation
4. Best new innovation in consumer money management using account aggregation
5. Best new innovation in solving problems for small businesses using account aggregation
6. Best new innovation in driving frictionless digital financial distribution
7. Best new innovation in third party payment initiation for consumers
8. Best use of applied data science using account aggregation as a force for good
9. Best technology provider vending to Open API Standards
10. Best new innovation from a Technical Service Provider
11. Most Open Finance / fintech friendly financial institution for the consumer moving into the future
12. Best innovation in security management: Who has done the most to protect consumer data?
13. Best consumer engagement by a Financial institution
14. Best products or services designed to improve SME productivity
15. Best Financial Institution at social inclusion for all customers
16. Open Banking Hero Award

### **How can you get involved?**

There are a number of ways to get involved in this year's Summit and Awards. The sponsorship packages (attached) are available on a first come first reserved basis so contact us as soon as you can with your selections.

***We would strongly urge potential sponsors and attendees to consider the option of membership. FDATA is a not for profit organisation, all revenue raised through sponsorship, table and delegate sales, will be invested in the event itself and in other membership activities focused on delivering the Association's core mission. There are also significant discounts for members - so please do ask for more information if you'd like to consider it - contact [rebecca@fdata.global](mailto:rebecca@fdata.global).***

## Packages

### Platinum – Summit and Awards

- Opportunity to Chair a Keynote Session at the Summit
- 5 staff delegate passes for the two-day summit (including speaker pass)
- 15 VIP Summit Guest passes for allocation to Senior Representatives from Financial Institutions
- Priority selection of exhibition slot
- Opportunity to include a handout in Delegate Materials or seat drop in the main plenary room
- Senior team member to be invited to the VIP Breakfast on Day One of the Summit
- **Prominent branding at the Open Finance Awards and alignment with one Award Category**
- Two tables of 10 at the Open Finance Awards Dinner
- Branded Meet and Greet area at the Open Finance Awards Cocktail Reception with Sparking Wine provided
- Prominent branding on Summit and Awards website, email communications, printed materials and signage on-site including event Handouts
- Formal Announcement of Sponsorship through social media channels
- 50% discount off additional tables and seats at the Open Finance Awards and Summit delegate passes

**TOTAL: £15,000 + VAT\***

### Gold - Summit and Awards

- Opportunity to Chair a Panel Session at the Summit
- 3 staff delegate passes for the two-day summit
- 7 VIP Summit Guest passes for allocation to Senior Representatives from Financial Institutions
- Exhibition Slot
- Opportunity to include a handout in Delegate Materials or seat drop in the main plenary room
- **Branding at the Open Finance Awards and alignment with one Award Category**
- Table for 10 at the Open Finance Awards Dinner
- Branded Meet and Greet area at the Open Finance Awards Cocktail Reception with Sparking Wine provided
- Prominent branding on Summit and Awards website, email communications, printed materials and signage on-site including event Handouts
- Formal Announcement of Sponsorship through social media channels
- 50% discount off additional tables and seats at the Open Finance Awards and Summit delegate passes

**TOTAL: £10,000 + VAT\***

### **Silver – Summit and Awards**

- 2 staff delegate passes for the two-day summit
- 3 VIP Summit Guest passes for allocation to Senior Representatives from Financial Institutions
- Exhibition Slot
- Opportunity to include a handout in Delegate Materials or seat drop in the main plenary room
- **1/2 at table (5 seats) 10 Open Finance Awards Dinner**
- Branding on Summit and Awards website, email communications, printed materials and signage on-site including event Handouts
- Formal Announcement of Sponsorship through social media channels
- 25% discount off additional tables and seats at the Awards and Summit delegate passes

**TOTAL: £7,500 + VAT\***

### **Lanyard Sponsor for Open Finance Summit**

- Branding on all Summit Lanyards
- Two delegate Pass for the Open Finance Summit
- Branding on Summit a website, email communications, printed materials and signage on-site for the two-day summit including event Handouts
- Formal Announcement of Sponsorship through social media channels
- 25% discount off additional Summit delegate passes and tables and seats at the Open Finance Awards

**TOTAL: £5,000 + VAT\***

### **Bag Sponsor**

- Branding all Summit Bags
- Two delegate Pass for the Open Finance Summit
- Branding on Summit website, email communications, printed materials and signage on-site for the two-day summit including event Handouts
- Formal Announcement of Sponsorship through social media channels
- 25% discount off additional Summit delegate passes and tables and seats at the Open Finance Awards

**TOTAL: £5,000 + VAT\***

### **Stationery Sponsor**

- Branding all Summit Stationery
- Two delegate Pass for the Open Finance Summit
- Branding on Summit website, email communications, printed materials and signage on-site for the two-day summit including event Handouts
- Formal Announcement of Sponsorship through social media channels
- 25% discount off additional Summit delegate passes and tables and seats at the Open Finance Awards

**TOTAL: £5,000 + VAT\***

### **Regulators' Meeting**

- Opportunity for a senior member of the team to attend the Regulators' Briefing Sessions
- Opportunity for Branding in the Regulators' Session Room
- Two delegate Pass for the Open Finance Summit
- Branding on Summit website, email communications, printed materials and signage on-site for the two-day summit including event Handouts
- Formal Announcement of Sponsorship through social media channels
- 25% discount off additional Summit delegate passes and tables and seats at the Open Finance Awards

**TOTAL: £5,000 + VAT\***

### **VIP Breakfast Sponsor**

- Opportunity for up to two members of the team to attend the VIP Breakfast on Day One of the Summit
- Opportunity for Branding in the Regulators' Session Room
- Two delegate Pass for the Open Finance Summit
- Branding on Summit website, email communications, printed materials and signage on-site for the two-day summit including event Handouts
- Formal Announcement of Sponsorship through social media channels
- 25% discount off additional Summit delegate passes and tables and seats at the Open Finance Awards

**TOTAL: £3,000 + VAT\***

### **Exhibition Stand at the Open Finance Summit**

- Exhibition Slot
- 2 staff delegate passes for the two-day summit
- Branding on Summit website, email communications, printed materials and signage on-site for the two-day summit including event Handouts
- 25% discount off additional Summit delegate passes and tables and seats at the Open Finance Awards

**TOTAL: £5,000 + VAT\***

### **Category Sponsor – Corporate**

- Branding at the Open Finance Awards and alignment with one Award Category
- Table for 10 at the Open Finance Awards Dinner
- Branded Meet and Greet area at the Open Finance Awards Cocktail Reception with Sparking Wine provided
- Prominent branding on Awards website, email communications, printed materials and signage on-site for the Awards
- Formal Announcement of Sponsorship through social media channels
- Listing and branding in Awards Handouts
- 25% discount off additional tables and seats at the Open Finance Awards and Summit delegate passes

**TOTAL: £5,000 + VAT\***

### **Cocktail Reception Sponsor**

- Branding at the Awards Cocktail Reception
- **1/2 at table (5 seats) 10 Open Finance Awards Dinner**
- Branding on Awards website and signage on-site for the Awards
- Formal Announcement of Sponsorship through social media channels
- Listing and branding in the Awards Handouts
- 25% discount off additional tables and seats at the Open Finance Awards and Summit delegate passes

**TOTAL: £5,000 + VAT\***

### **Winners' Gift Sponsor**

- Branding on Champagne Bottles to be presented to all winners
- Branding on Awards website and signage on-site for the Awards
- **1/2 at table (5 seats) 10 Open Finance Awards Dinner**
- Formal Announcement of Sponsorship through social media channels
- Listing and branding in the Awards Handouts
- 25% discount off additional tables and seats at the Open Finance Awards and Summit delegate passes

**TOTAL: £5,000 + VAT\***

### **Entertainment Sponsor**

- Opportunity to select Award Host and receive special mention
- Opportunity to introduce the celebrity host and evening entertainment
- **1/2 at table (5 seats) 10 Open Finance Awards Dinner**
- Branding on Awards website and signage on-site for the Awards
- Formal Announcement of Sponsorship through social media channels
- Listing and branding in the Awards Handouts
- 25% discount off additional tables and seats at the Open Finance Awards and Summit delegate passes

**TOTAL: TBC**

### **Bar Sponsor**

- Opportunity to sponsor the bar for post Awards drinks
- **1/2 at table (5 seats) 10 Open Finance Awards Dinner**
- Branding on Awards website and signage on-site for the Awards
- Formal Announcement of Sponsorship through social media channels
- Listing and branding in the Awards Handouts
- 25% discount off additional tables and seats at the Open Finance Awards and Summit delegate passes

**TOTAL: £5,000 + VAT\***