



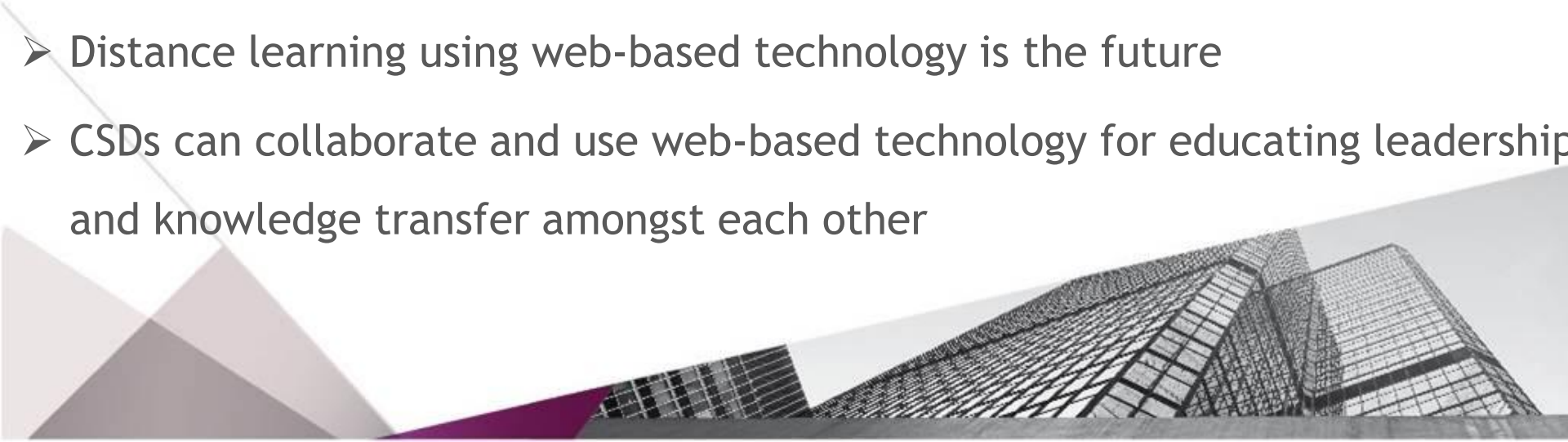
AMEDA 23rd Meeting, Tangier

Taking Education On Line

May 2016

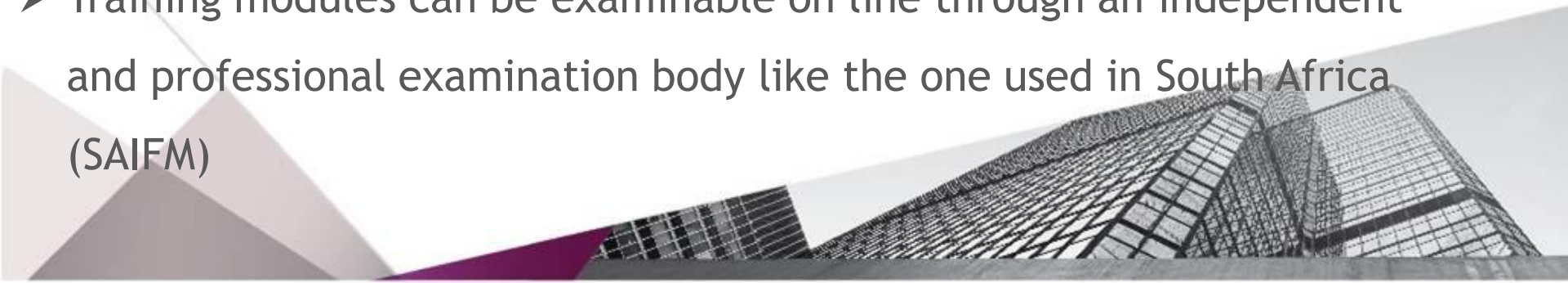
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- Industry leaders are ageing and CSDs have an obligation to build future leaders
- Greater need to create awareness and promote the CSD industry through education
- Financial markets are evolving and faster, more accessible ways to reach market players must be developed
- Education should be freely available and easily accessible to everyone
- Distance learning using web-based technology is the future
- CSDs can collaborate and use web-based technology for educating leadership and knowledge transfer amongst each other



Importance of On Line education

- Increase in demand for training from both local and international stakeholders
- Development of a web-based Application is cost effective and less time consuming
- Material is user-friendly, dynamic and easily accessible anywhere in the world
- Content is updated real time to ensure relevance
- Ability to partner with other training platforms for wider scope of material
- Training modules can be examinable on line through an independent and professional examination body like the one used in South Africa (SAIFM)



Strate e-Tutor Educational Tool





Successes of Strate e-Tutor

- Launched end of October 2014, average number of 250 users per month
- 45% are returning to the App and 55% are new
- Feedback from stakeholders has been very positive from survey
- Clients are using the App to educate their clients
- Market players are utilising the App throughout their organisation as a training requirement
- Promoting the CSD industry to non-traditional stakeholders

Challenges faced

- Consistently keeping content up to date and relevant
- Content must cater for a wider scope of stakeholder needs
- Creating an awareness campaign ensuring the tool is being utilised effectively
- Implementing innovative ways to deliver material
- Measuring the effectiveness of the training and users competencies



- Strate examination certification has significant credibility on stakeholders CVs and is recognised by the Compliance Institute of South Africa
- International accreditation for qualification through a professional body in the UK - Chartered Institute of Securities and Investments (CISI)
- Entrant into Financial Services Research Gold Award for Innovation



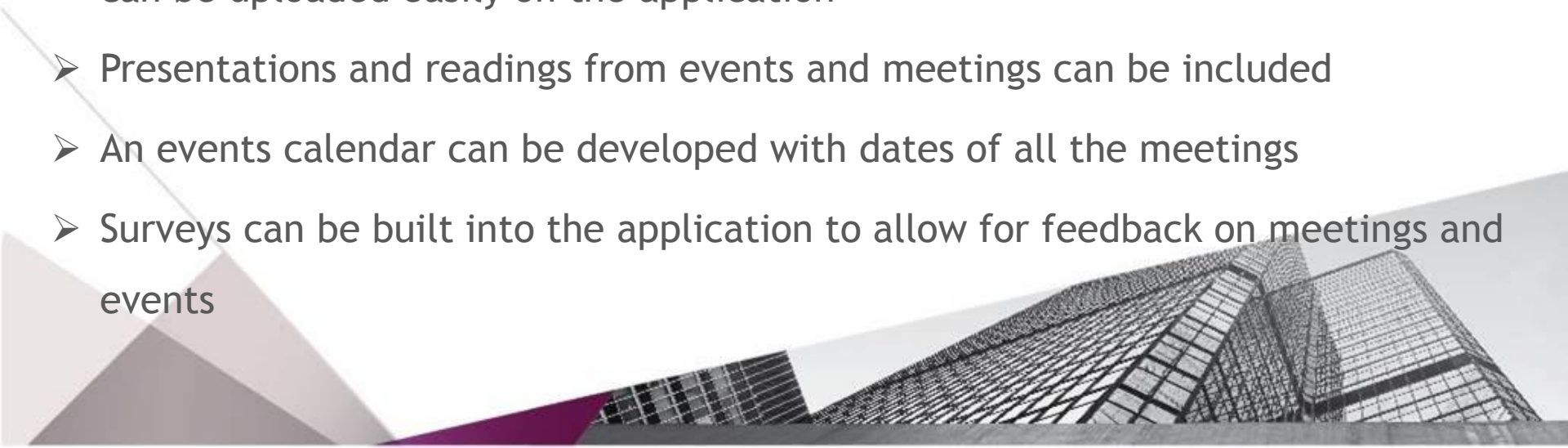
Benefits of an online application for the global CSD community

- CSDs could develop their own web-based application for their market and customise content to their stakeholder needs
- An on line educational App is being developed for the World Federation of CSDs - Go Live June 2016
- Access will be via the web and easily accessible
- It could provide a platform for collaboration and thought leadership across regions
- CSDs and Regional Associations are encouraged to share content and contribute to the App to keep it real time and relevant



Benefits of online education for the global CSD community (cont.)

- Development of a web-based application is more cost effective and less time consuming
- Training modules will be based on generic topics such as CPMI/IOSCO principles and the Role of a CSD in Financial Markets
- Articles on current developments in different regions and video clip interviews
- All pre-work and preparation for upcoming CSD events or regional meetings can be uploaded easily on the application
- Presentations and readings from events and meetings can be included
- An events calendar can be developed with dates of all the meetings
- Surveys can be built into the application to allow for feedback on meetings and events



Way Forward

- All CSDs, in any country, can use on line education to market themselves and to build a sustainable learning platform for their industry
- Strate is open to share lessons learnt, intellectual property and opportunities realized from the Strate e-Tutor platform
- Investigate the possibility of building a regional application for AMEDA under the Secretariat
- Use the application to upload material for preparation for AMEDA meetings
- Upload video clips or interviews from presentations at AMEDA meetings
- What could AMEDA contribute to the WFC on line application?