



fi  compass

Final report
October 2025

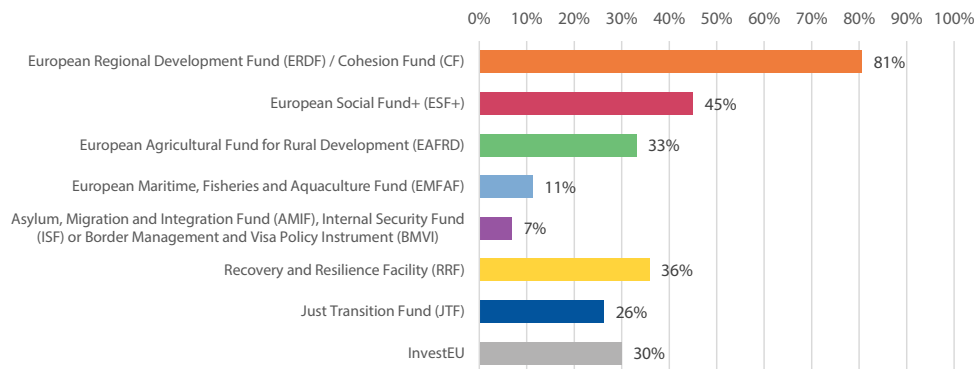
fi-compass survey 2024



1. Introduction

The fi-compass survey 2024 was conducted from 25 October to 13 December 2024 and targeted all registered fi-compass users. A total of **184 submitted relevant responses** were received, of which approximately 70% were from Managing authorities and bodies implementing financial instruments. The remainder of the responses were from other fi-compass stakeholder groups including EU institutions (principally the European Commission and European Investment Bank), other public bodies and consultants. **All the fi-compass funds were represented** and, interestingly around one third of the respondents also reported an involvement with other EU resources including resources, such as InvestEU and the Resilience and Recovery Facility (RRF).

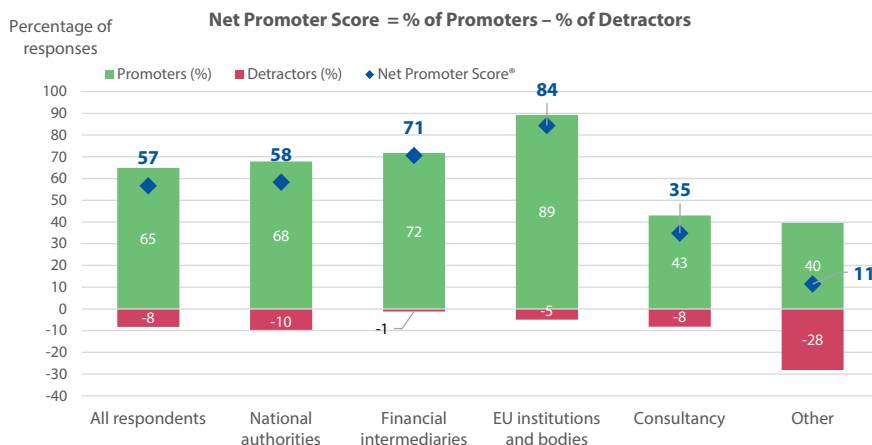
Figure 1: Representation of EU Funds



2. Impact of fi-compass

Respondents were invited to indicate whether they would recommend fi-compass to other colleagues with a view to assessing its **Net Promoter Score® (NPS)**, a standardised measure of user satisfaction. The responses showed that fi-compass had an **NPS of 57** (where an NPS above 50 is generally considered 'excellent')¹.

Figure 2: Net Promoter Score® (NPS) of fi-compass

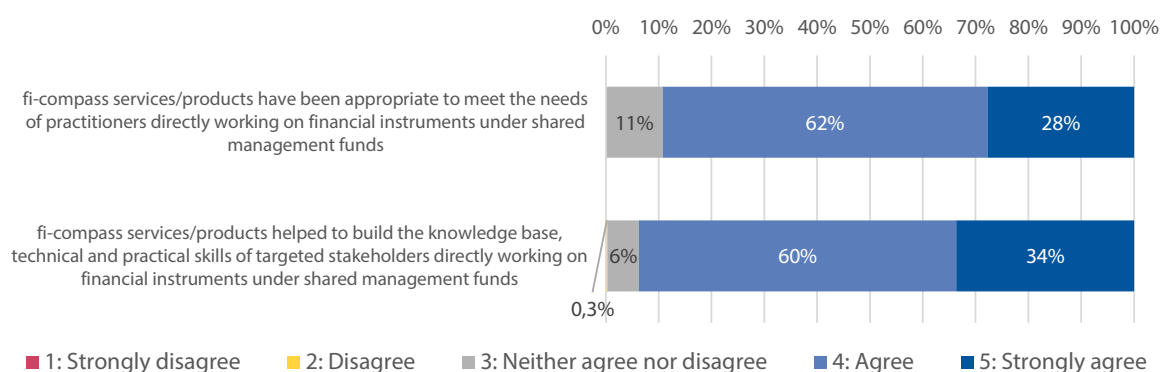


¹ The Net Promoter Score® is based on a survey question asking respondents to rate the likelihood that they would recommend fi-compass to a colleague on a 0-10 scale. Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

3. Direct results of fi-compass

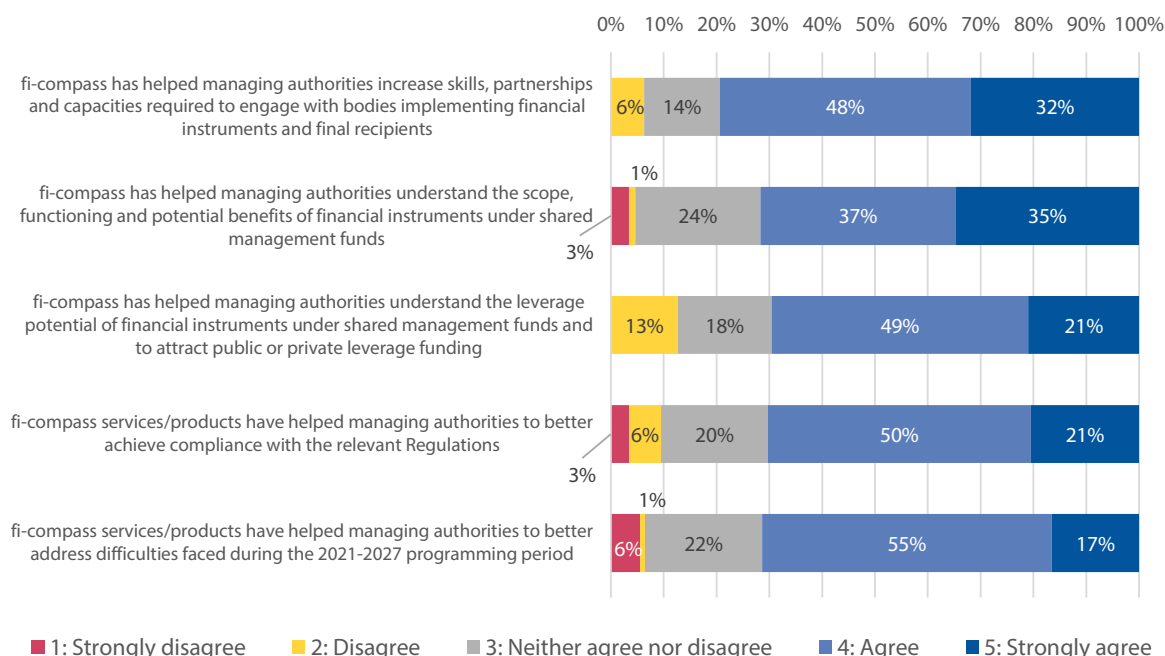
The majority of respondents have a consistently positive view of the direct results of fi-compass. 89% of participants believe that **fi-compass products are appropriate for meeting their needs** related to financial instruments under shared management funds. 94% of practitioners feel that fi-compass products have contributed to **enhancing their knowledge base**, as well as their **technical and practical skills** related to financial instruments under shared management funds.

Figure 3. Feedback from all practitioners



Respondents from managing authorities also have a positive view of the direct results for themselves. Managing authorities demonstrated the strongest agreement, with 48% agreeing and 32% strongly agreeing, that fi-compass has **helped them enhance their skills, build partnerships, and strengthen the capacities** needed to engage with bodies implementing financial instruments and final recipients.

Figure 4. Feedback from managing authorities

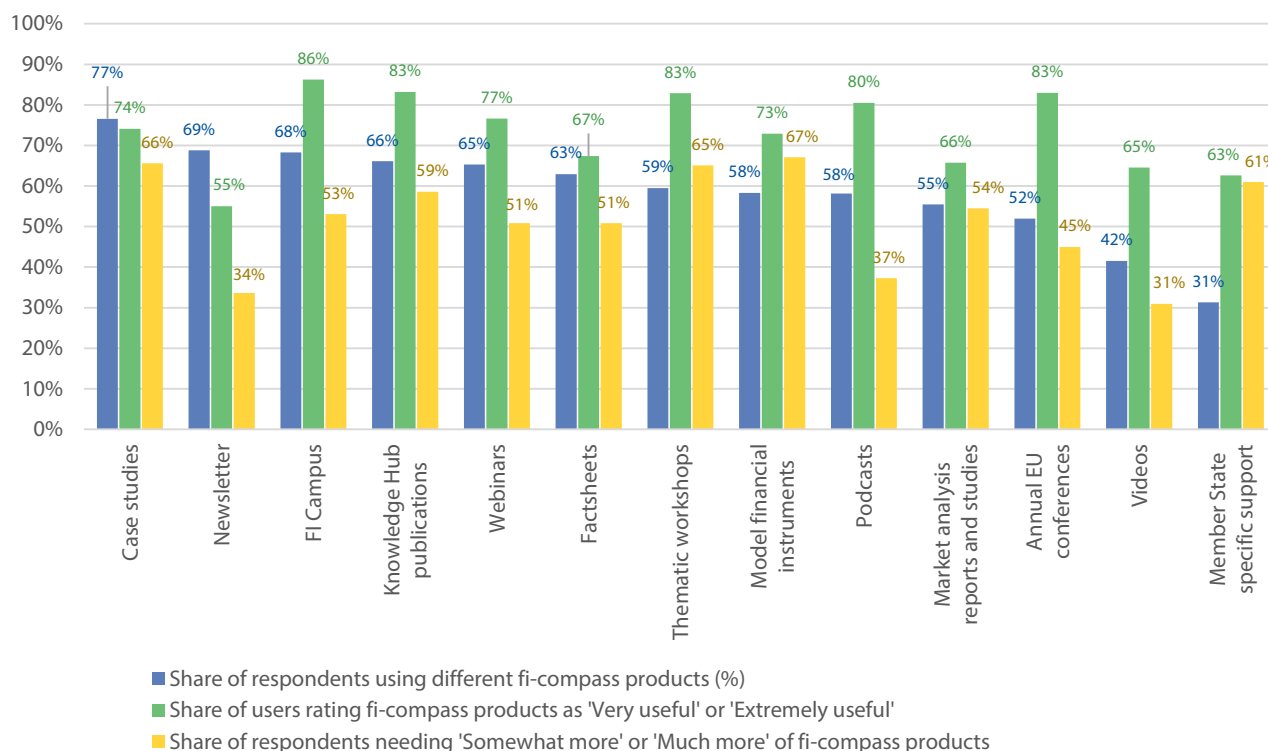


4. Feedback on products

The survey results indicate that **fi-compass products are widely used** by respondents, and that usage levels vary depending on the type of product and its target audience. Some products are designed for broader audiences, while others cater to more specialised groups, which is reflected their reach. **Respondents generally find fi-compass products useful**, with at least half of users rating each product

as 'Very useful' or 'Extremely useful' (4-5 on a 1-5 scale). Users also express overall satisfaction with the timeliness and accessibility of fi-compass products, with **in-person events and publications** receiving particularly high ratings. Respondents also indicated that they would like to see an increase in a number of products including **targeted coaching/Member State specific support, model financial instruments and case studies**.

Figure 5. Use, usefulness and future needs of fi-compass products

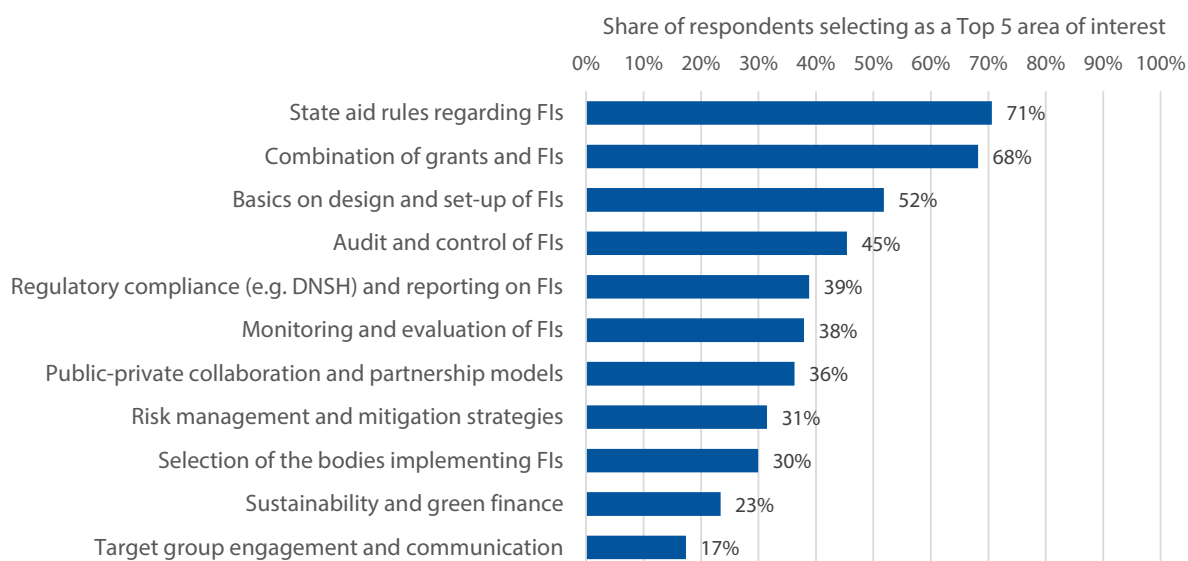


5. Future development of fi-compass

Respondents indicated demand for further topic-specific **events** and **practical content** such as case studies, model financial instruments and real-life examples, to support hands-on learning and knowledge sharing on financial instruments. In addition, a stronger **differentiation of products** to cater to varying levels of expertise was frequently mentioned as desirable by respondents. These suggestions are not universally validated by all respondents. However, they provide context and reasoning that complement the quantitative feedback on future needs regarding fi-compass products.

Respondents, on average, identified **State aid rules**, the **combination of grants with financial instruments**, and the fundamentals of **designing and setting up financial instruments** as the three most significant 'horizontal' areas of interest (see figure 6).

Figure 6. Most important areas of interest for the future



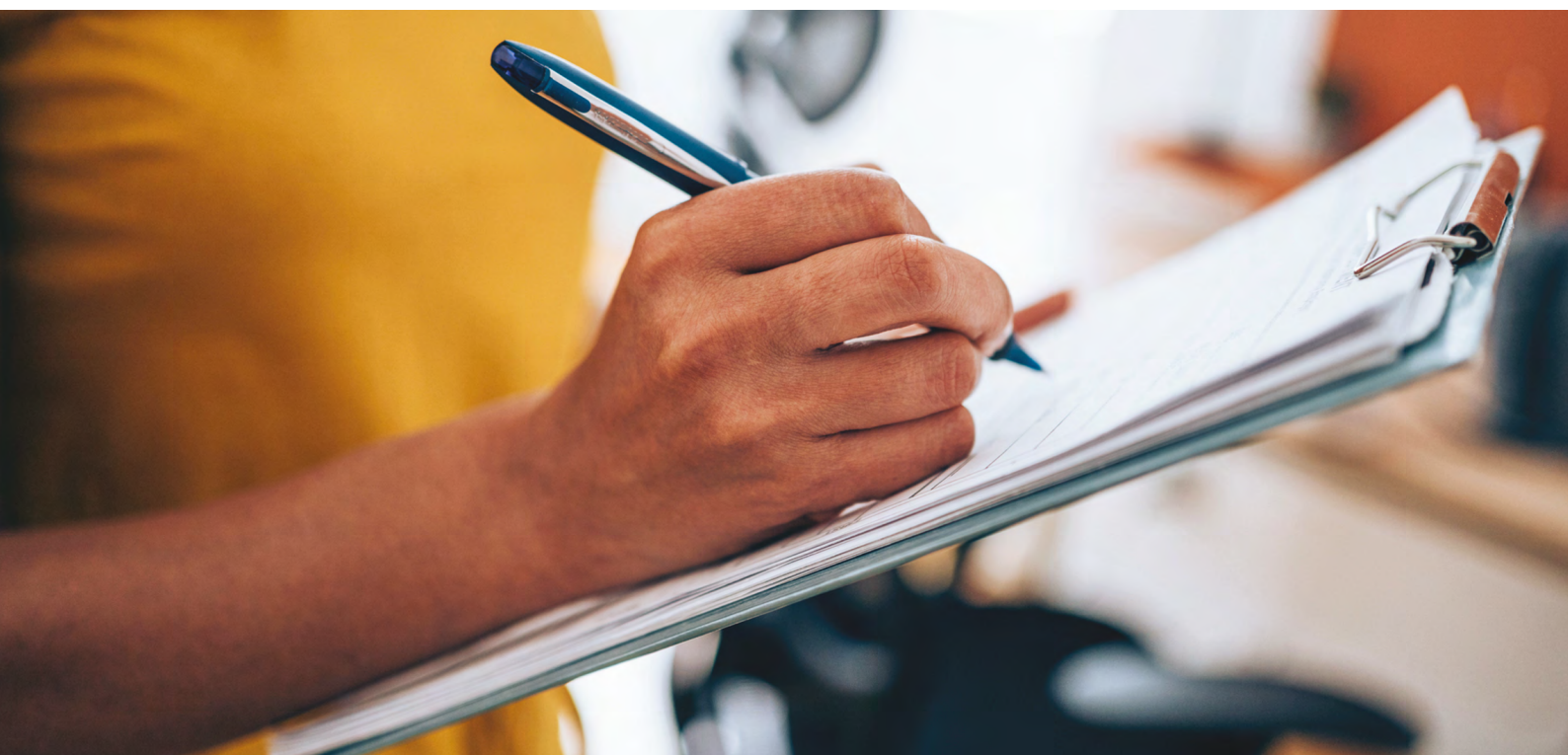
Beyond the most frequently covered thematic areas (e.g. SMEs, energy efficiency, renewable energy sources, R&D), there is an emerging need for fi-compass to help design financial instruments in areas such as **affordable housing, the circular economy, and agricultural sector competitiveness**. Respondents indicated a high need for capacity building events, mentioning particularly the in-person flagship conferences such as **FI Campus and the annual EAFRD conference** but also thematic and Fund-specific events.

6. Further feedback

Respondents provided additional feedback, through free text boxes included in the survey. In addition, follow-up interviews were carried out with a sample of respondents. Although the feedback is anecdotal, some common themes emerged which are helpful in interpreting the results.

The interview responses indicated that fi-compass remains highly relevant to its stakeholders' needs and is valued for its **professionalism, technical expertise and support for networking opportunities/peer to peer exchanges**. Respondents appreciate the accessibility of the resources and the practical approach to supporting practitioners to find workable solutions to common challenges in areas such as State aid, audit, combination and regulatory compliance. There is a growing demand for **differentiated resources** for different groups (e.g. introductory materials for newcomers and know-how for experts) and more events would be welcomed by some practitioners.

Overall, the feedback supported the findings of the survey. **Events remain an important part of fi-compass** with flagship events such as FI Campus and the annual EAFRD conference being highly prized for providing comprehensive coverage of key topics and productive networking opportunities. At the same time smaller events such as the Knowledge Hub and online thematic workshops allow more technical topics to be addressed in a timely way. Resources including **case studies, model financial instruments and market studies** also continue to provide practical know-how and support to the implementation of financial instruments in Member States.



www.fi-compass.eu
contact@fi-compass.eu
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European Commission
Directorate-General
Regional and Urban Policy
Unit B.3 "Financial Instruments
and IFIs' Relations"
B-1049 Brussels

European Investment Bank
EIB Advisory
fi-compass
98-100, boulevard Konrad Adenauer
L-2950 Luxembourg