2028-2034

HIT group meeting on Capitalisation and synergies in project design and assessment

18 September 2026

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Today's purpose

A first diagnostic and orientation meeting, not a wording negotiation

What we will do

- Share reading of survey learning points
- Identify improvement directions for the AF and assessment criteria

What we will not do

- Final wording or decisions today
- Close down options before written feedback and the next HIT discussion

What we need from you

Confirm, nuance or challenge what the survey suggests, based on your programme experience

Agenda

Setting the scene	Survey learning points	Template challenge	Technical blocks	Next steps
Shared framing on capitalisation and synergies in Interreg and HIT	Survey synthesis, discussions	Looking at joint improvement needs	Capitalisation and synergies specific sections	Conclusions and homework

Setting the scene

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Working definitions

Capitalisation: Builds on, **using, adapting, transferring, embedding or scaling** knowledge and results so that they contribute to **impact and lasting change**.

Developing Synergies: Build **clear links with other policies, programmes, funds, strategies or initiatives to avoid duplication**, get more out of the funding, and increase **impact**. Synergies place Interreg within the **bigger EU picture**

Synergies in current HIT Application Form

C.2.5 How does the project contribute to wider strategies and policies?

Please indicate to which strategies and policies your project will contribute. Then describe in what way you will contribute.

Strategy		Contribution
Strategy 1	☐	*Enter text*
Strategy 2	☐	*Enter text*

C.2.6 Which synergies with past or current EU and other projects or initiatives will the project make use of?

Project or initiative	Synergies
Enter title	*Enter text*
Enter title	*Enter text*

Capitalisation in current HIT Application Form

C.2.7 How does the project build on available knowledge?

Please describe the experiences/lessons learned that the project draws on, and other available knowledge the project capitalises on.

Enter text here

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Capitalisation in current HIT Application Form

C.8 Long-term plans

Purpose and logic:

- In all questions we use both terms: outputs/deliverables. Depending on programme rules, both can apply or only one or the other. Please adjust questions as needed.
- We ask only about the long-term plans for outputs because by using outputs the results are achieved. So, if outputs have a long-lasting effect, the results will also be long-lasting. It is important to emphasise that not all questions are relevant for all type of outputs.

As a programme, we would like to support projects that have a long-lasting effect in the territory and those who will benefit from them. Please describe below what you will do to ensure this.

C.8.1 Ownership - Please describe who will ensure the financial and institutional support for outputs/deliverables developed by the project (e.g., tools), and explain how these outputs/deliverables will be integrated in the work of partner organisations.

Enter text here

C.8.2 Durability - Some outputs/deliverables should be used by relevant groups (project partners or others) after the project's lifetime, in order to have a lasting effect on the territory and the population. For example, new practices in urban transport need to be used by local authorities to have cleaner air in the city, and the whole population will benefit from this. Please describe how your outputs/deliverables will be used after the project ends, and by whom.

Enter text here

C.8.3 Transferability - Some outputs/deliverables that you will deliver could be adapted or further developed to be used by other target groups or in other territories. What will you do to make sure that relevant groups are aware of your outputs/deliverables and are able to use them?

Enter text here

Current HIT assessment criteria

Strategic assessment criteria

Project relevance

How well is the need for the project justified?

...

- The project clearly contributes to a wider strategy on one or more policy levels (EU / national / regional). – AF C.2.5

...

How does the project build on existing practices?

- The project makes use of available knowledge and builds on existing results and practices. – AF C.2.7
- The project tries to avoid overlaps and replications; there is evolution of ideas. – AF C.2.2
- The project demonstrates new solutions that go beyond the existing practice in the sector/programme area/participating countries or adapts and implements already developed solutions. – AF C.2.2

Project intervention logic

...

To what extent will project outputs have an impact beyond project lifetime?

- Project outputs are durable (the proposal is expected to provide a significant and durable contribution to solving the challenges targeted) – if not, it is justified. – AF C.8.2
- Project main outputs are applicable and replicable by other organisations/regions/countries outside of the current partnership (transferability) – if not, it is justified. – AF C.8.3

Why discuss them capitalisation and synergies together?

Different notions, but common purpose: helping projects avoid working in isolation

Shared concern	Capitalisation angle	Synergies angle
Building on what exists	Previous knowledge, results, practices	Other projects, funds, strategies
Avoiding isolated projects	Reuse, uptake, transfer	Complementarity and coordination
Strengthening impact	Lasting use, durability, wider uptake	Combined or amplified effect. Avoid duplication
Making it operational	Users, work plan, resources, responsibilities	Coordination arrangements, work plan, timing, added value

Core question: how can HIT help applicants explain these elements clearly, without making the templates heavier than necessary?

Survey learning points

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How to read the survey

Initial evidence to structure the discussion, not final conclusions

26
entries received so far

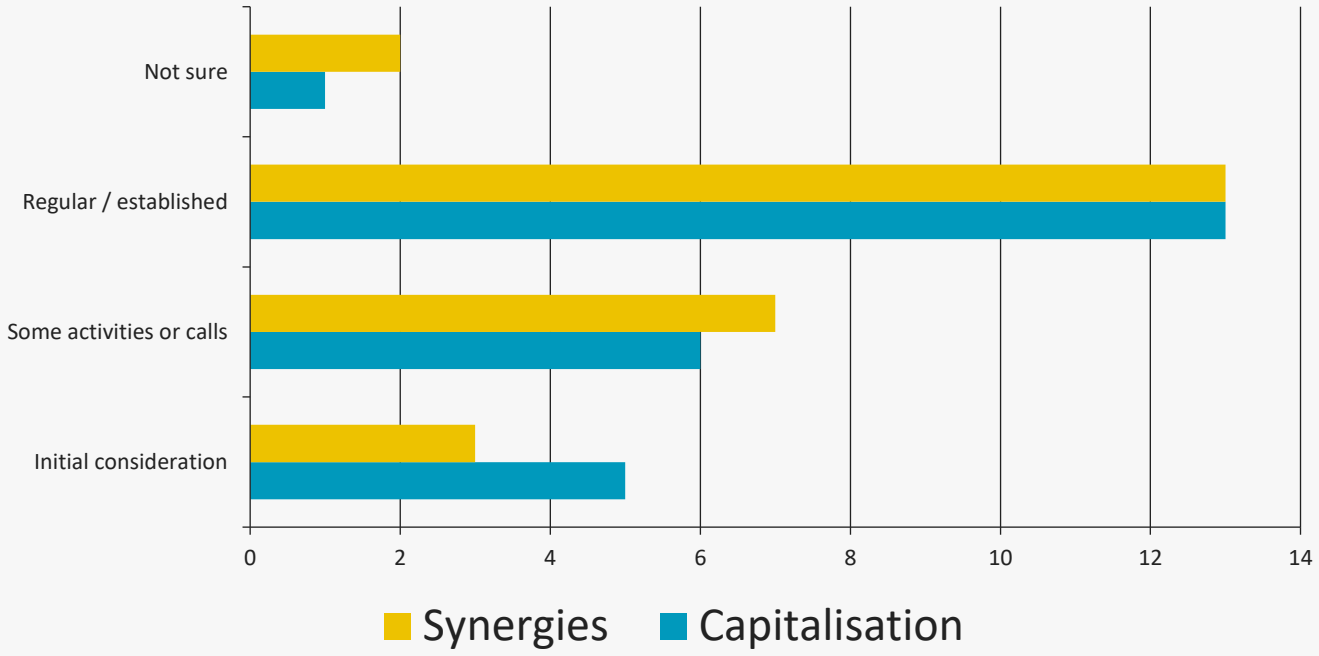
3
lenses for synthesis

Today's invitation

Confirm, nuance or challenge the learning points. Not all participants completed the survey, so the analysis is a starting point for further input.

Lens 1: programme maturity and diversity

A diverse group, but not a blank page.



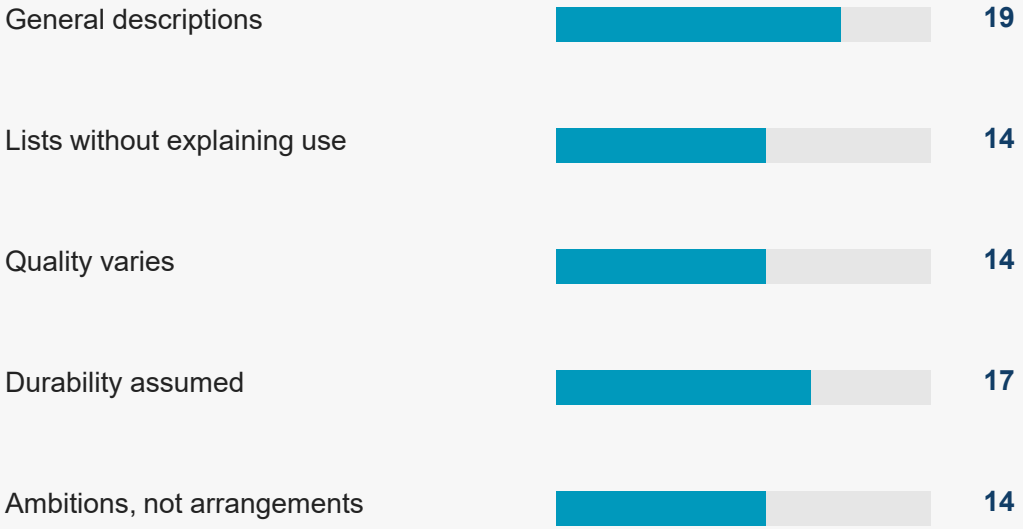
Learning point: Enough experience to learn from existing practice; enough diversity to keep future HIT proportionate.

Core issue: What should HIT keep flexible because programme practice is not at the same stage everywhere?

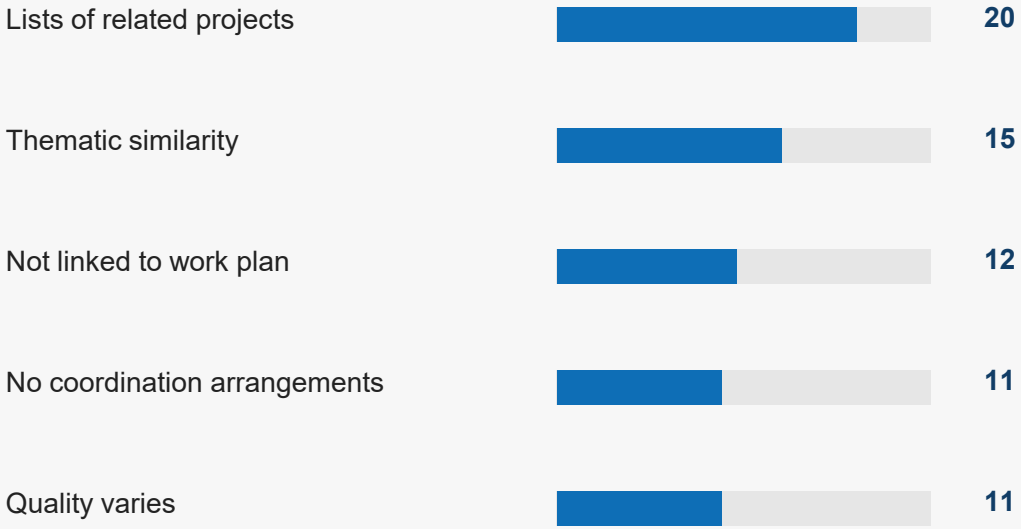
Lens 2: what applicants currently provide

Applicants often answer, but not always concretely

Capitalisation patterns



Synergies patterns



Core issue: moving from description to demonstration, who uses what, how it happens, and what value it adds

Lens 3: dedicated sections and cross-connections

Dedicated sections exist, but need stronger substance and links

Capitalisation potential

Current HIT AF rating: 2.7 / 5

Meaningful synergies

Current HIT AF rating: 2.7 / 5

Learning point: the current template gives an entry point, but not yet enough support to generate consistently useful, operational and assessable information

The HIT template challenge

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The HIT template challenge

Two complementary improvement needs

1. Substantiate dedicated sections
Help applicants understand what information is expected and why it matters.

2. Create targeted cross-links
Connect the logic to work plan, target groups, partnership, resources, results and assessment.

C.2.5
Strategies

C.2.6
Synergies

C.2.7
Available knowledge

C.8.1
Ownership

C.8.2
Durability

C.8.3
Transferability

Assessment
Criteria

Question for today: where should HIT provide stronger structure, and where would additional prompts create unnecessary burden?

Technical blocks

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Capitalisation block

From previous knowledge to uptake, transfer and lasting use

What should applicants demonstrate so that capitalisation is concrete, operational and assessable?

Capitalisation: notes and conclusions from the programmes

C.2.7 and C.8 need clearer links to practical use and lasting change

Previous work stays descriptive

C.2.7 often brings general descriptions or lists of projects, with little explanation of what the project will use, adapt or take further.

Users need a stronger role

Programmes ask for more focus on intended users and stakeholders, involving them early so outputs meet real needs and can be used.

Continued use is assumed

C.8 answers often describe ambitions, without credible arrangements for maintenance, institutional support or use after closure.

Assessment weight varies

C.2.7 and C.8 mostly feed into broader criteria. Programmes call for assessment to reflect the same logic of uptake and lasting use.

Weak links to the work plan

Plans for uptake and transfer often lack dedicated activities, resources or responsibilities. Applicants need clearer links to implementation.

Follow-through needs attention

Capitalisation receives more attention at application and assessment than during implementation or after closure. Programmes want stronger follow-through.

Proportionality matters: adapt the depth of transfer and uptake requirements to the project and call, with clear guidance and no repeated narrative.

Capitalisation: improvement levers

Capitalisation should not be only an end-of-project question

Previous knowledge
What is being used, adapted or taken further?

Users and stakeholders
Who needs to be involved for uptake?

Work plan and resources
What activities, timing and responsibilities?

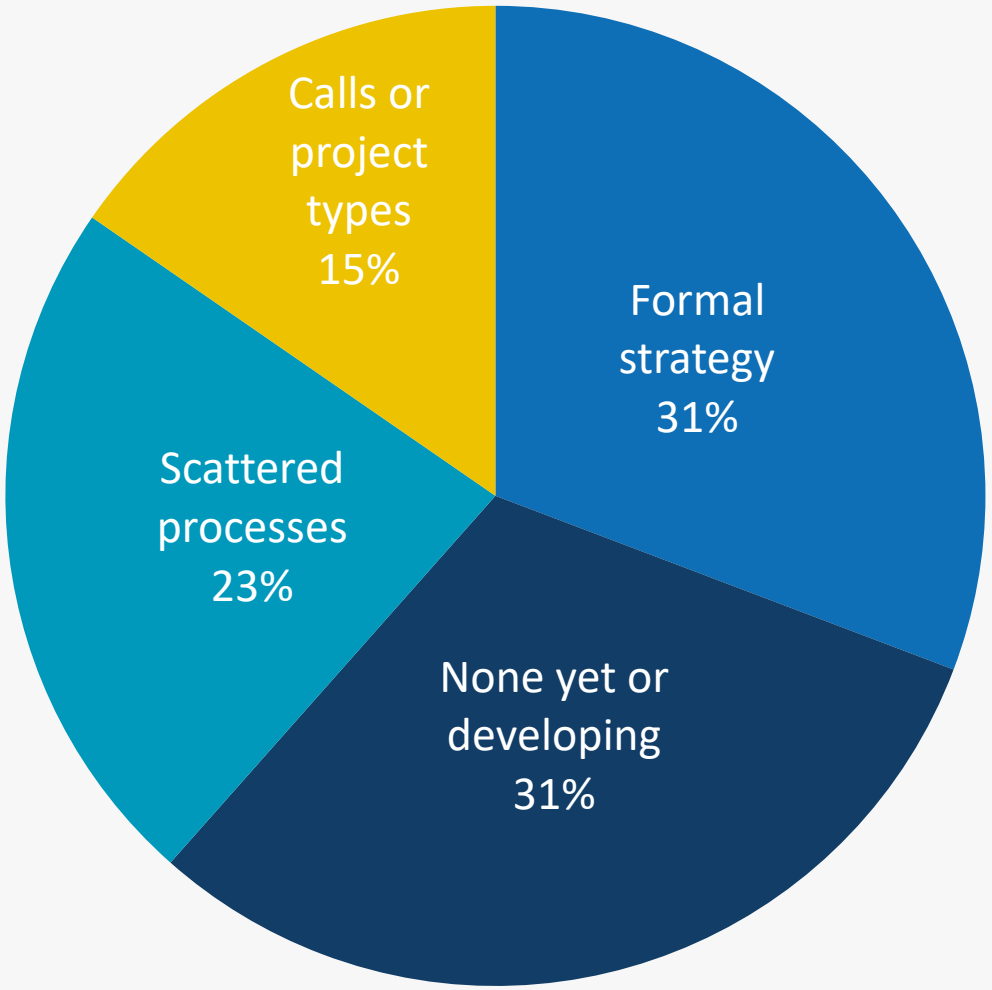
Lasting use and impact
What will continue, transfer or change?

Discussion focus

Which parts of this pathway belong in C.2.7 and C.8, and which need light links elsewhere in the Application Form or assessment criteria?

Explicit approach?

12 of 26 programmes have a formal capitalisation strategy (8) or dedicated calls and project types (4). Six address it through ad-hoc processes, and eight have no approach yet, are still building one or are not sure. Starting points differ widely.



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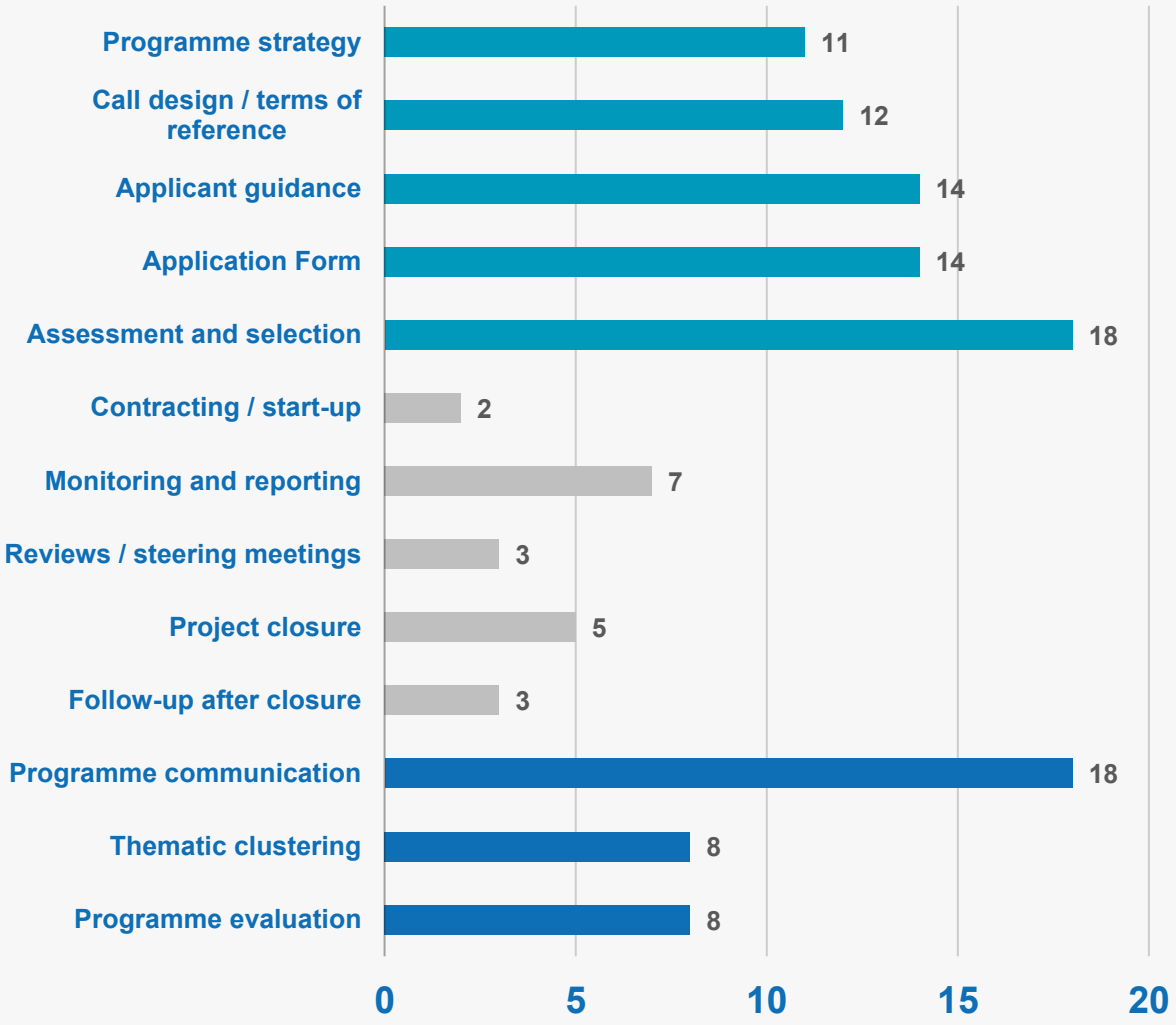
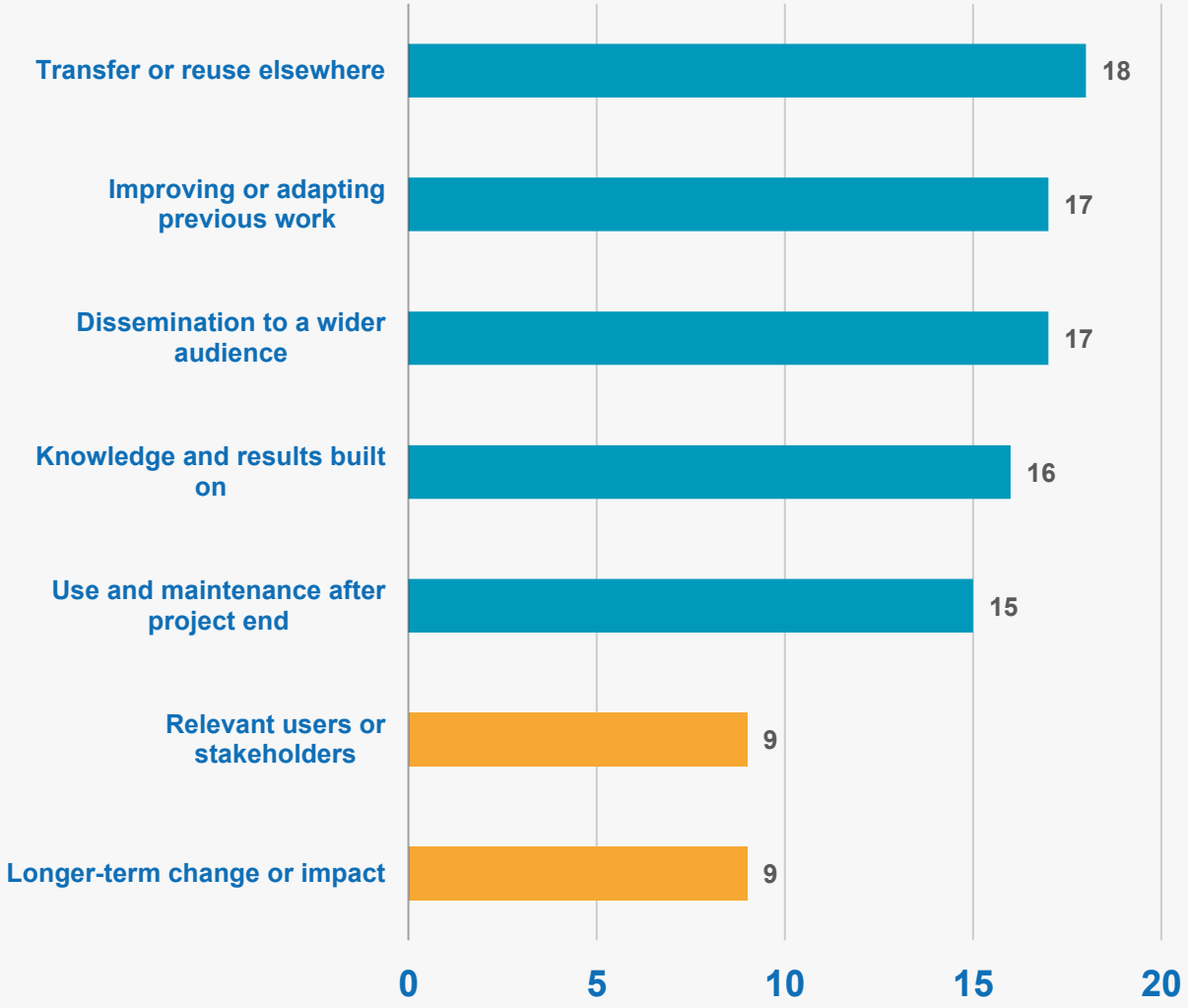


Capitalisation is strongest before projects start: assessment (18), guidance and the Application Form (14 each). It fades once projects run (grey): monitoring (7), closure (5), follow-up after closure (3). Programme communication (18) carries much of the load.

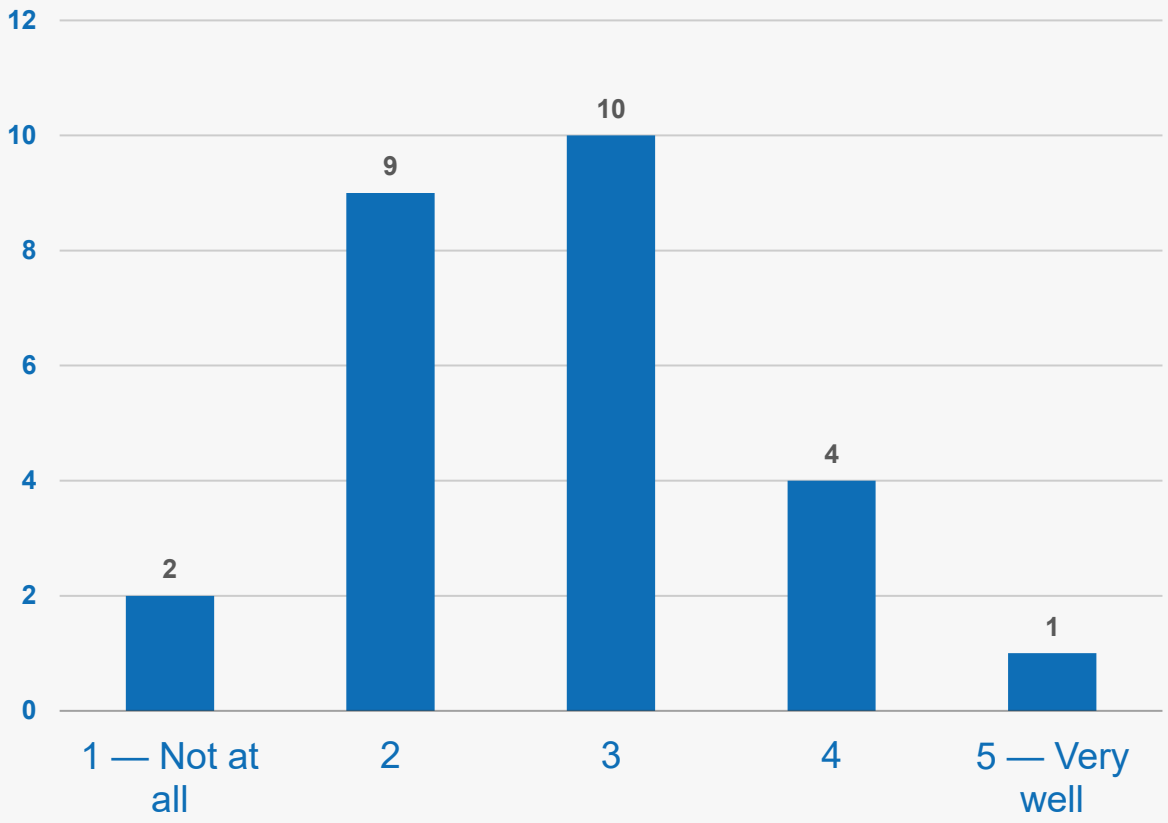
Expected evidence

Programmes mostly expect transfer (18), building on previous work (17) and dissemination (17). Far fewer specify who the users are (9) or what lasting change is expected (9) - the two elements that turn outputs into uptake.



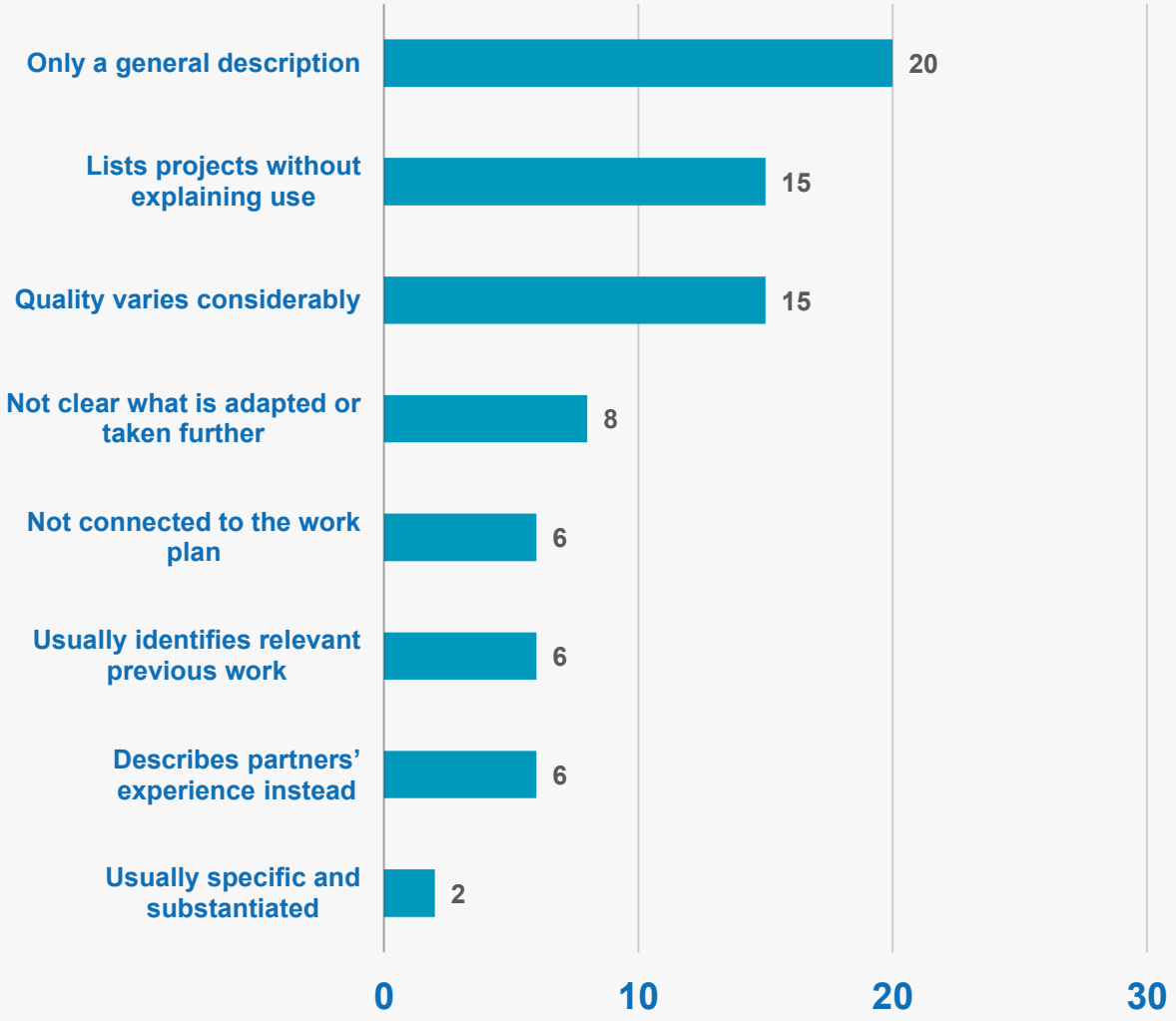
AF rating

The HIT Application Form scores 2.7 out of 5 for understanding a project's capitalisation potential. 19 of 26 programmes rate it a 2 or a 3; only one gives it a 5. A basis to build on, not yet a reliable tool.



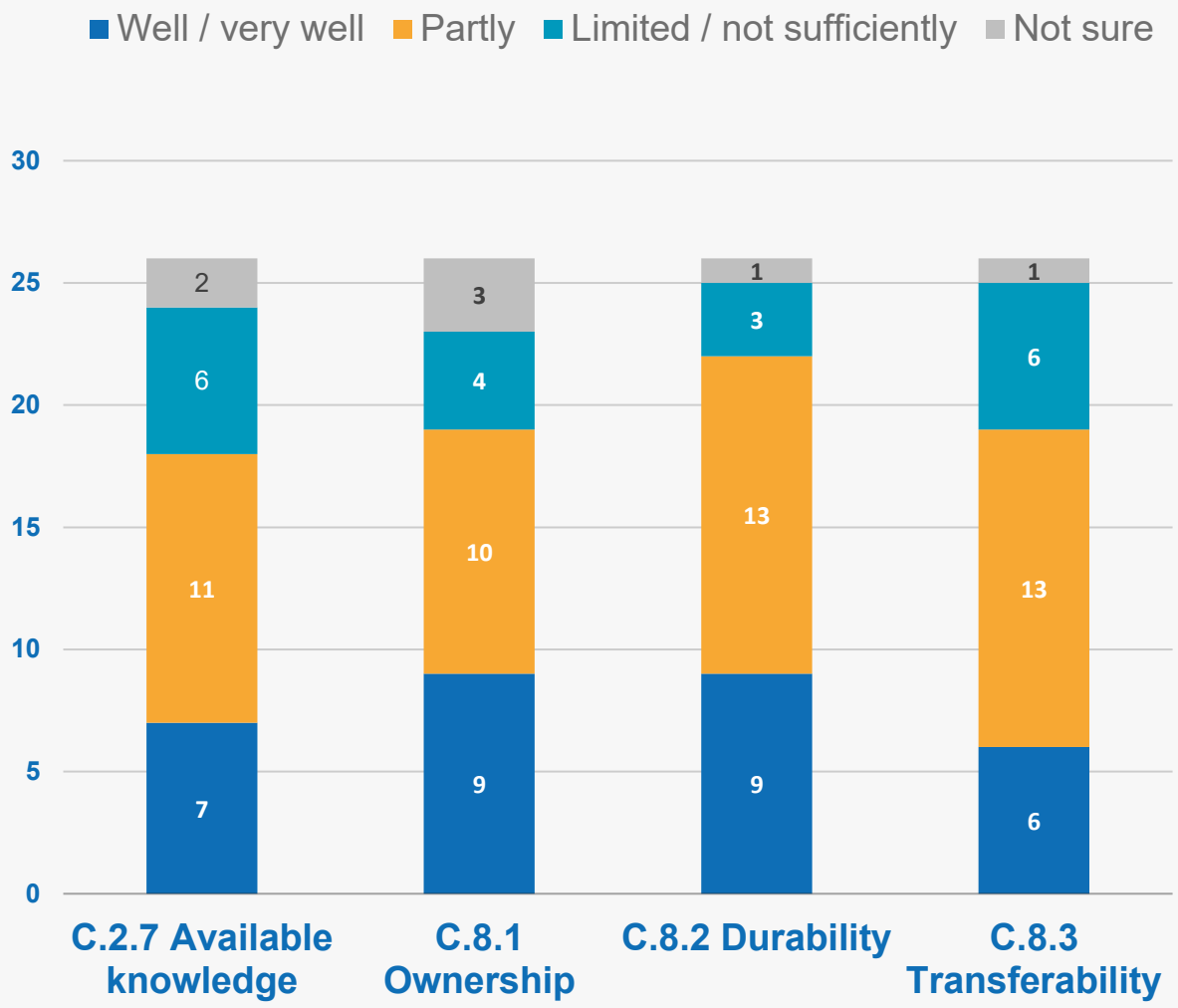
Knowledge base

C.2.7 answers are often general descriptions (20) or lists of previous projects without explaining how their results will be used (15).



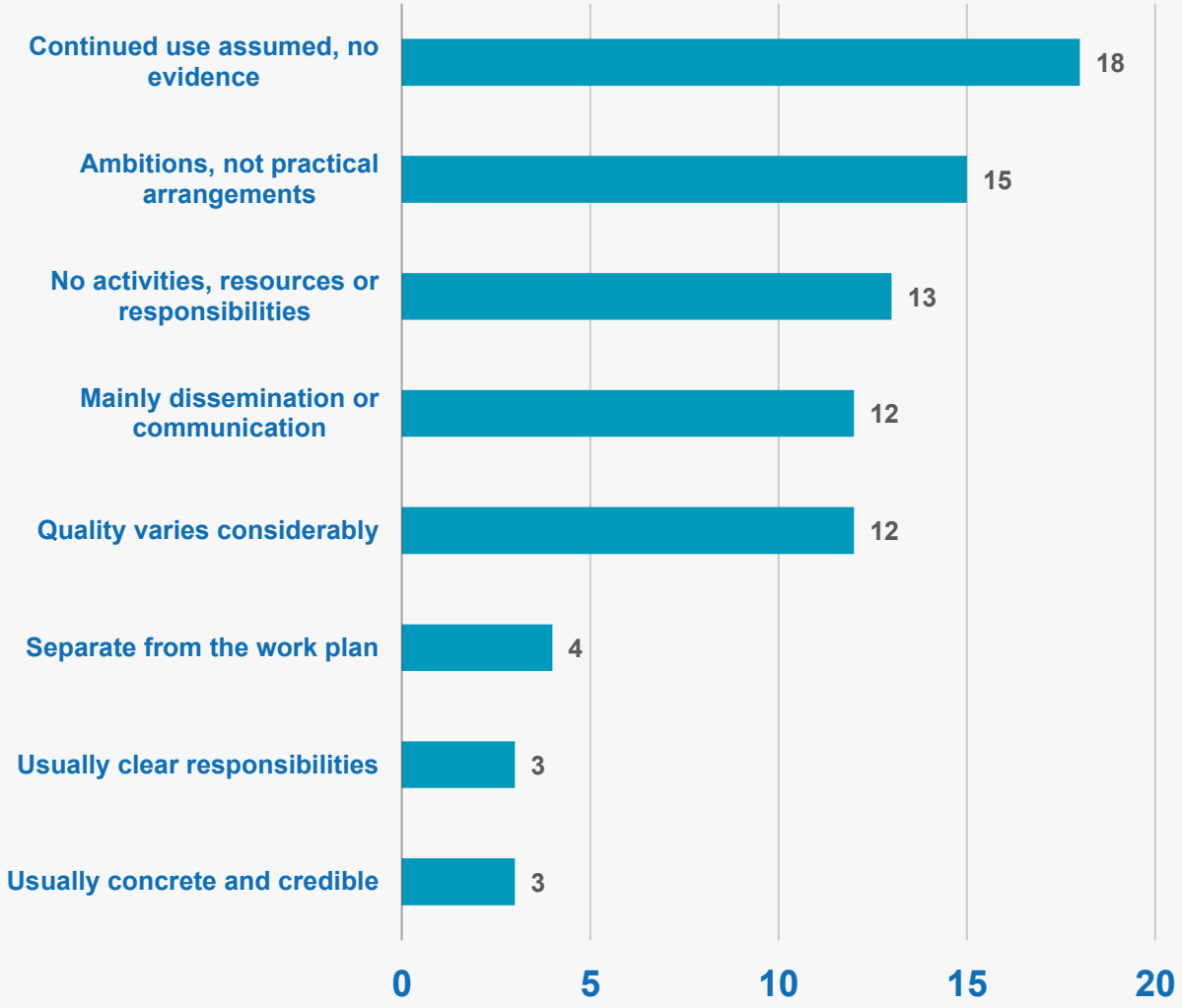
Section by section

Most programmes rate each section only “partly” helpful. Transferability (C.8.3) is weakest: just 6 rate it well and 6 limited. Ownership and durability do best, with 9 “well” each.



Long-term plans

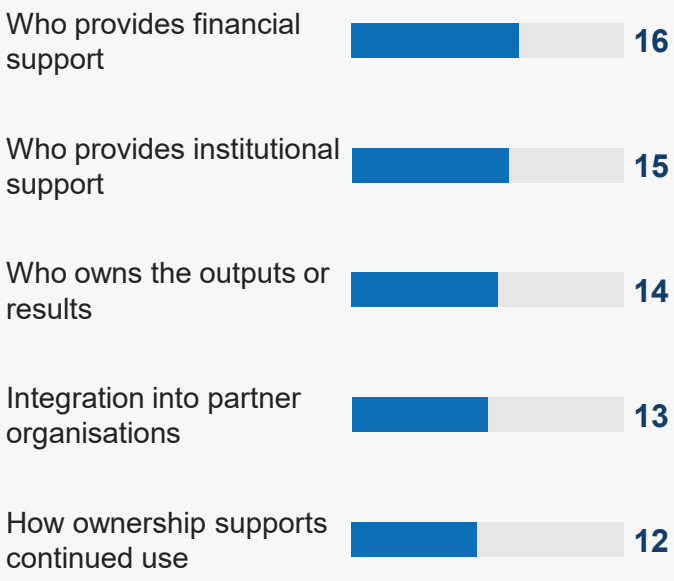
C.8 answers often assume outputs will simply continue (18) and describe ambitions rather than arrangements (15). Thirteen programmes miss dedicated activities, resources or responsibilities. Only 3 find answers usually concrete.



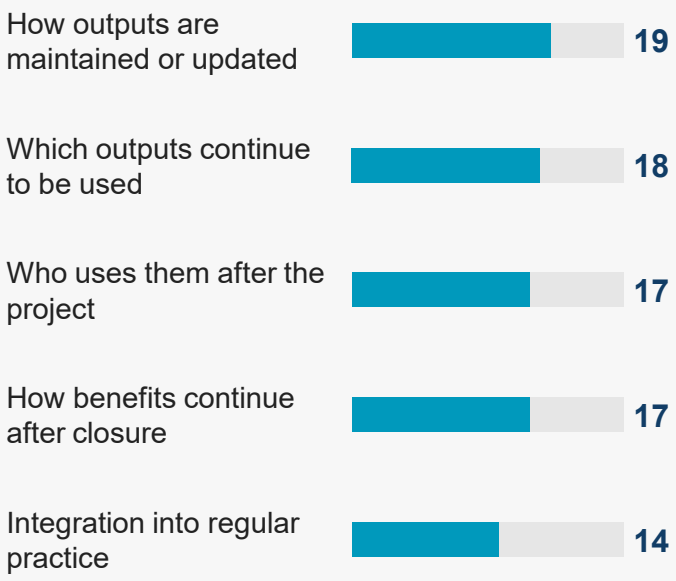
Capitalisation: what C.8 should demonstrate

Programmes want practical arrangements for continued use, not intentions

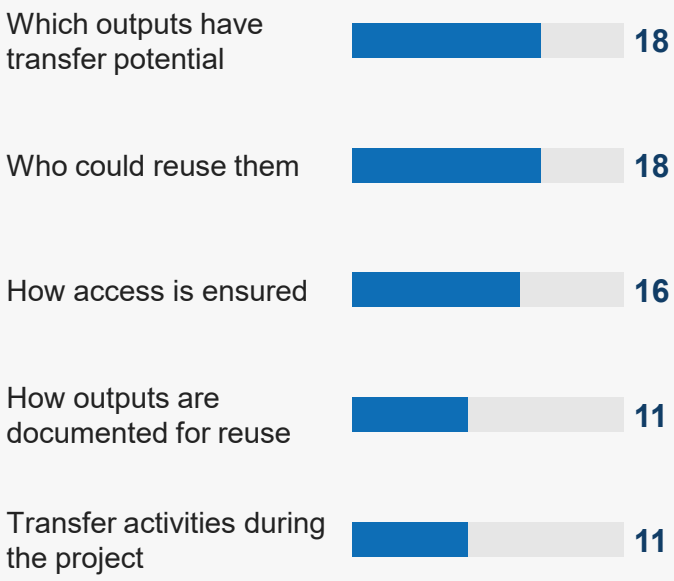
C.8.1 Ownership



C.8.2 Durability



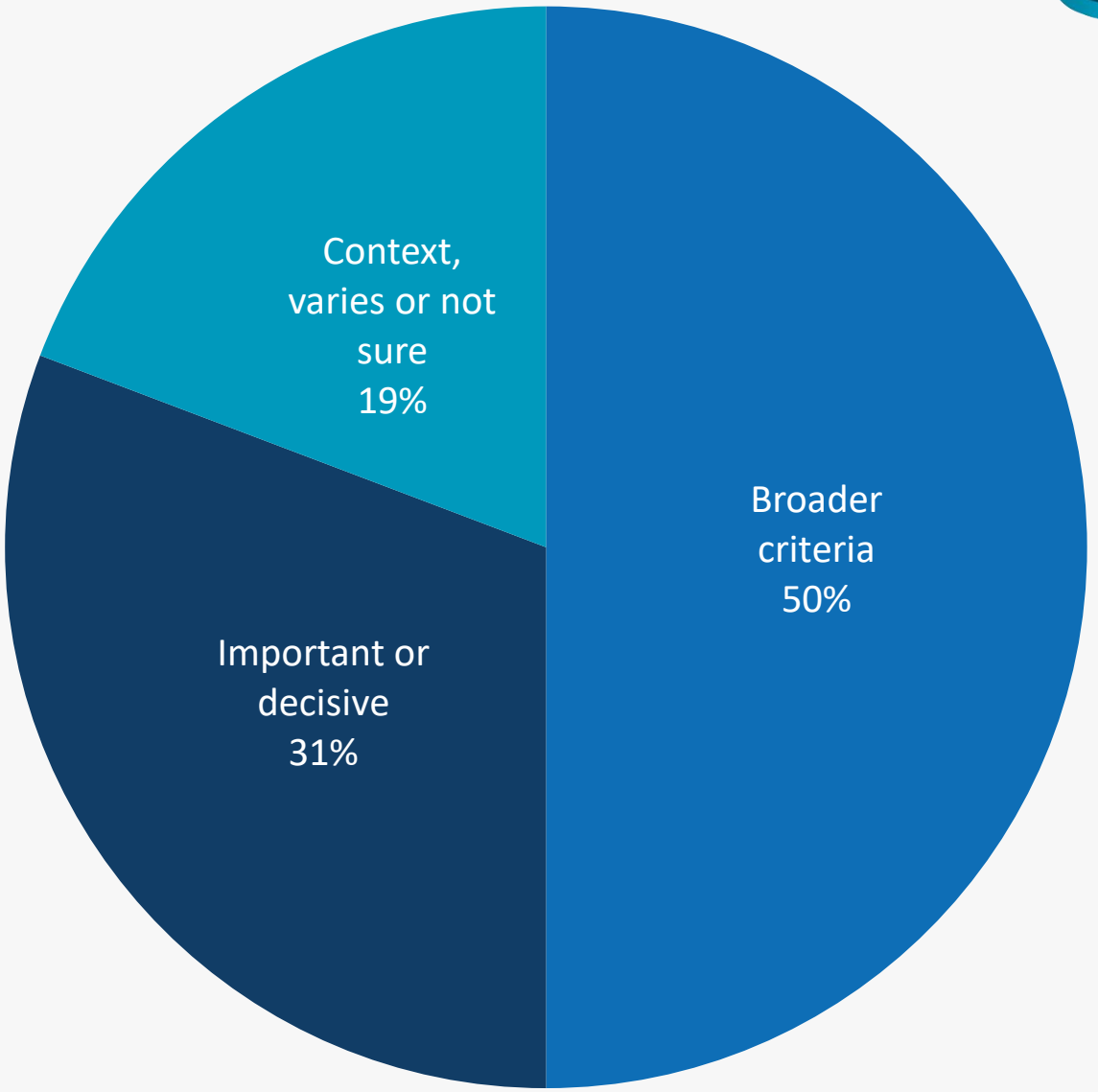
C.8.3 Transferability



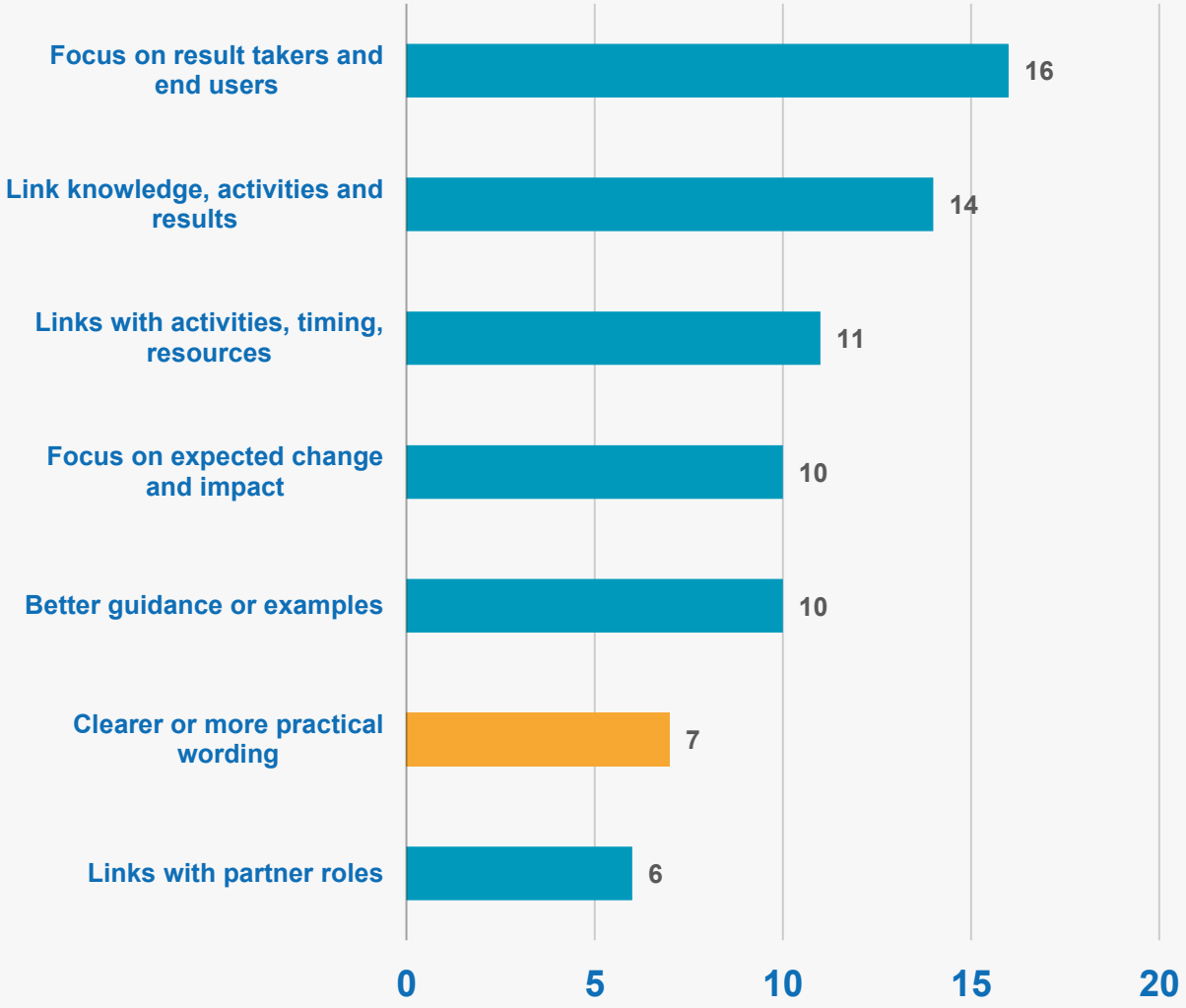
Less often expected: evidence of demand from users (9), responsible partner per output (8), follow-up of continued use (8), resources dedicated to transfer (5). Scale: 26 programmes.

Weight in assessment

For half of the programmes (13), C.2.7 and C.8 feed into broader assessment criteria; 7 see them as an important part and only 1 says they can swing the score. What is scored matters as much as what is asked.



What would help



Top asks: more focus on result takers and end users (16), and stronger links between previous knowledge, activities and results (14). Clearer wording comes near the bottom (7) - logic before language.

Capitalisation: proposed solutions

Capitalisation throughout project design, with proportionate requirements

FROM
Describing previous work and future ambitions

→

TO
Showing how knowledge becomes usable results and lasting change

1
Build on knowledge
In C.2.7, explain what existing knowledge or results the project will use, adapt or improve, and how this shapes the activities.

2
Involve future users
Identify who needs the results and how they will help develop or test them. Link target groups to uptake and expected change.

3
Make C.8 concrete
Clarify ownership, continued use and transfer. Ask who will maintain and use outputs, with what support, and how others can reuse them.

4
Link to delivery
Reflect uptake and transfer in the work plan, with activities, timing, responsibilities and resources. Use light cross-references.

5
Align assessment
Assess the credibility of planned use and lasting change. Match expectations to project types, with practical guidance and examples.

Integration: where should links appear?

Where would stronger links improve project design and assessment, and where would they create unnecessary burden?

AF / assessment section	Capitalisation	Synergies	Not at all
Project relevance (C.2)	○	○	○
Intervention logic	○	○	○
Partnership relevance (C.3) + Partner motivation and contribution (B.1.6)	○	○	○
Target groups / users (C.2.4)	○	○	○
Work plan (C.4)	○	○	○
Quality management (C.7.2) + Communication (C.7.3)	○	○	○
Budget / resources	○	○	○

Miro link

Synergies block

From thematic similarity

to complementarity and added value

What minimum information shows that a synergy is meaningful?

Synergies: notes and conclusions from the programmes

C.2.5 and C.2.6 ask for a list, not for a working connection

A list, not a connection

C.2.6 asks for “synergies with past or current projects” without separating a list of initiatives from how the project coordinates with, complements or avoids duplication with them.

No coordination mechanism

Nothing asks applicants to show concrete arrangements: with whom, how and with what resources. There is only a free-text box.

Scope too narrow

Strategies, policies and EU investments get their own question — but disconnected from C.2.6

No assessment counterpart

C.2.6 has no explicit criterion. Synergies are diluted in broader questions on building on existing practice and avoiding overlap.

Invisible in the work plan

Synergies are mentioned in the narrative but rarely translated into verifiable activities, responsibilities or timing.

Depth of synergy varies

Many projects stay at awareness or avoiding duplication. Fewer reach practical coordination or a combined, amplified effect.

Macro-regional and sea-basin strategies: a useful example where relevant to the programme geography — a conditional example, not a universal HIT requirement.

Synergies: improvement levers

The issue is not listing related projects, but showing how the connection works

1. Clarify C.2.5 and C.2.6

What should applicants explain beyond naming related initiatives? Should these 2 sections be separate?

2. Link to implementation

Should synergies show activities, timing, responsibilities or coordination mechanisms?

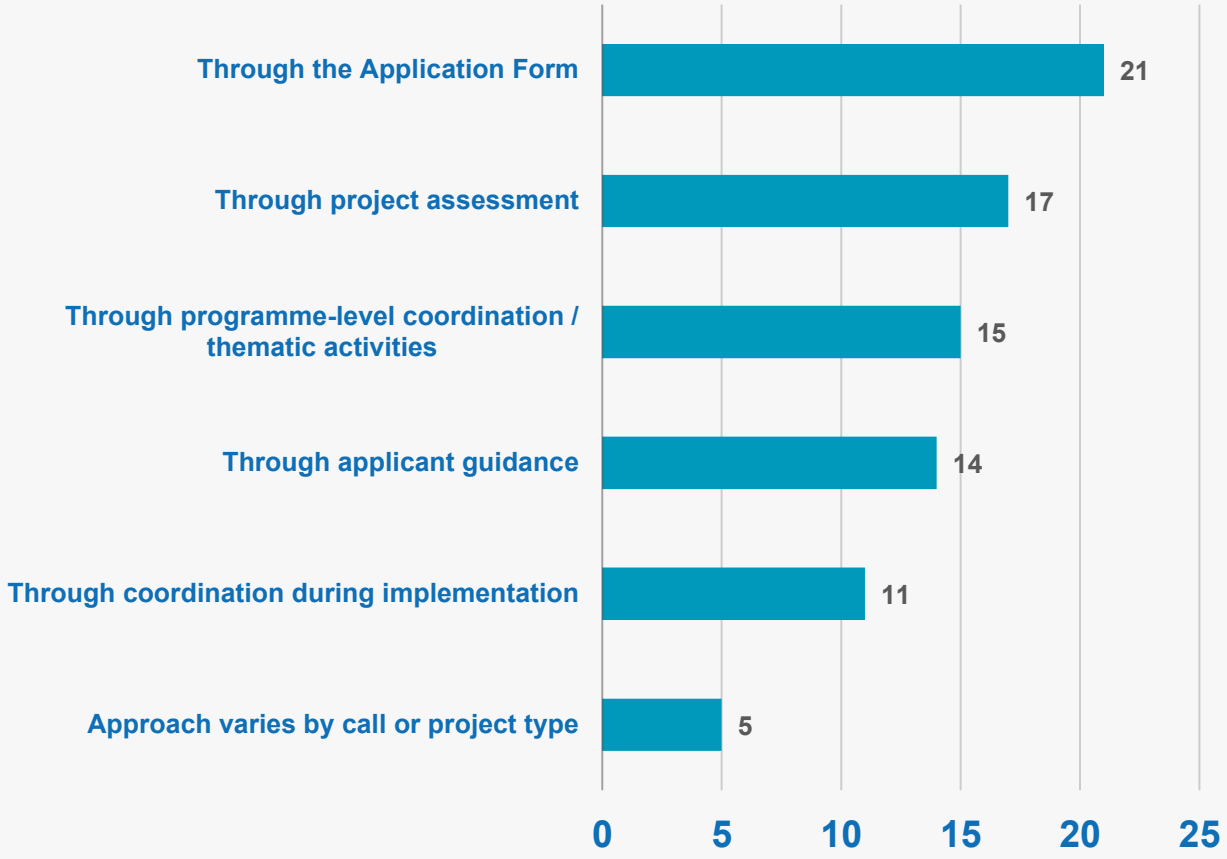
3. Support assessment

How can assessment distinguish thematic similarity from real synergy?

Formula: meaningful synergy = specific connection + practical mechanism + added value for results or impact

Current practice

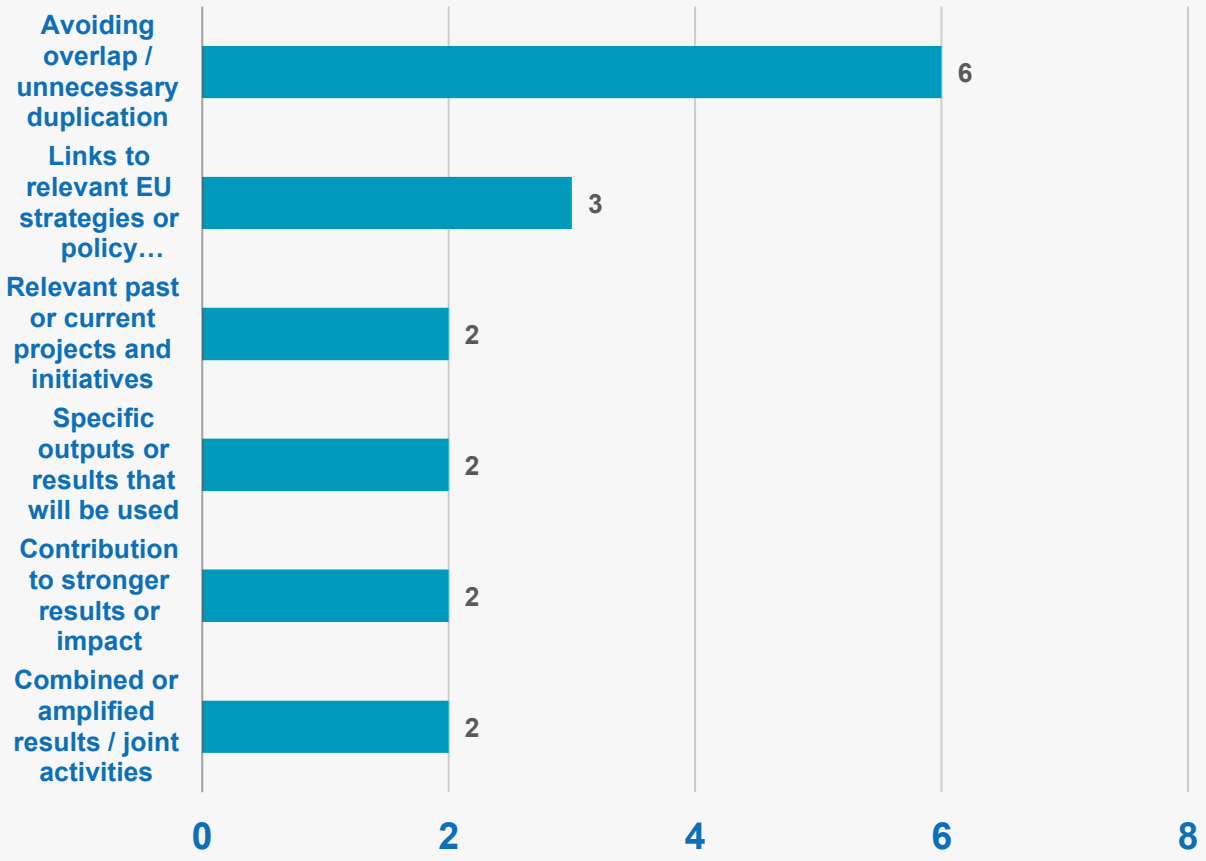
Almost every programme (21 of 26) builds synergies into the Application Form. Most also check them at assessment (17), and many during implementation (11). The AF question is one checkpoint among several — rewording it alone won't fix everything.



What's expected

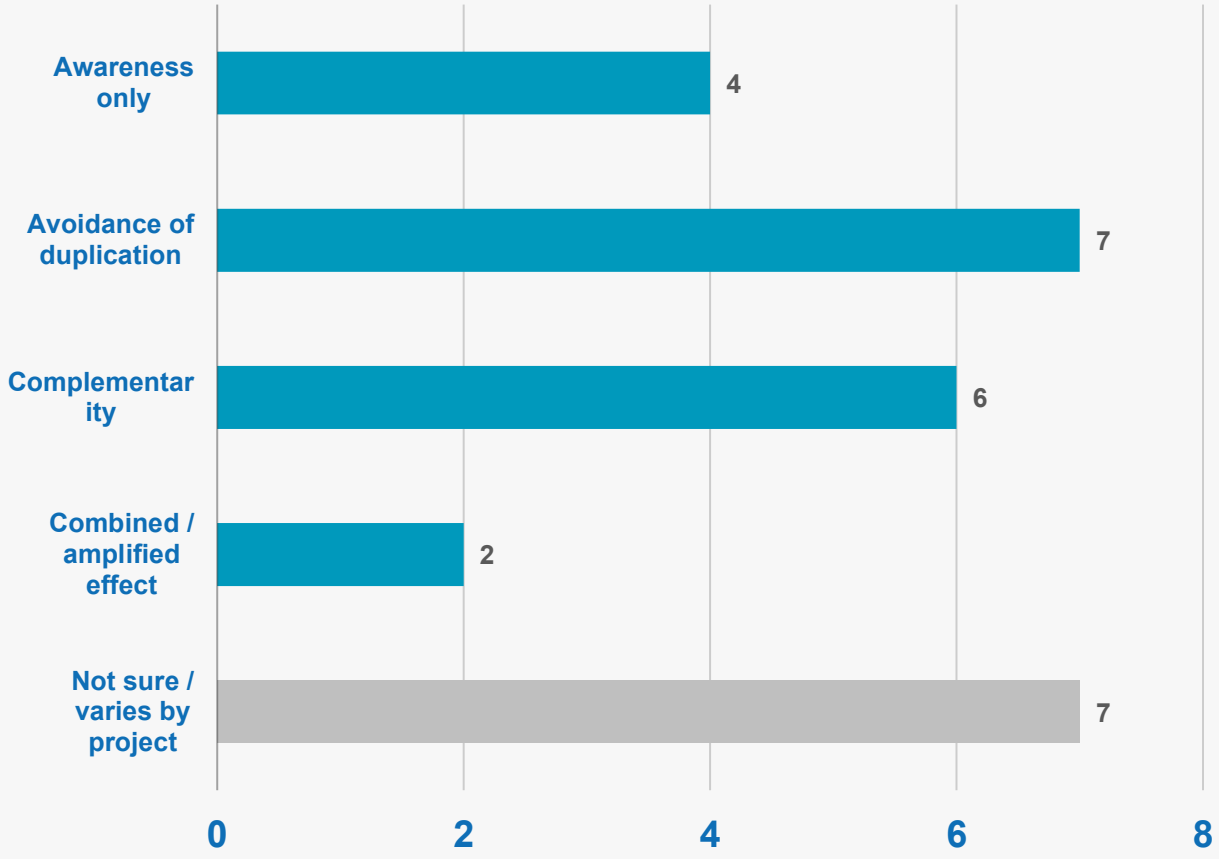
No single idea dominates: avoiding overlap leads (6), but 8 programmes answered most options — they expect a mix. Before rewording C.2.6

it's worth agreeing what "good" looks like across programmes.



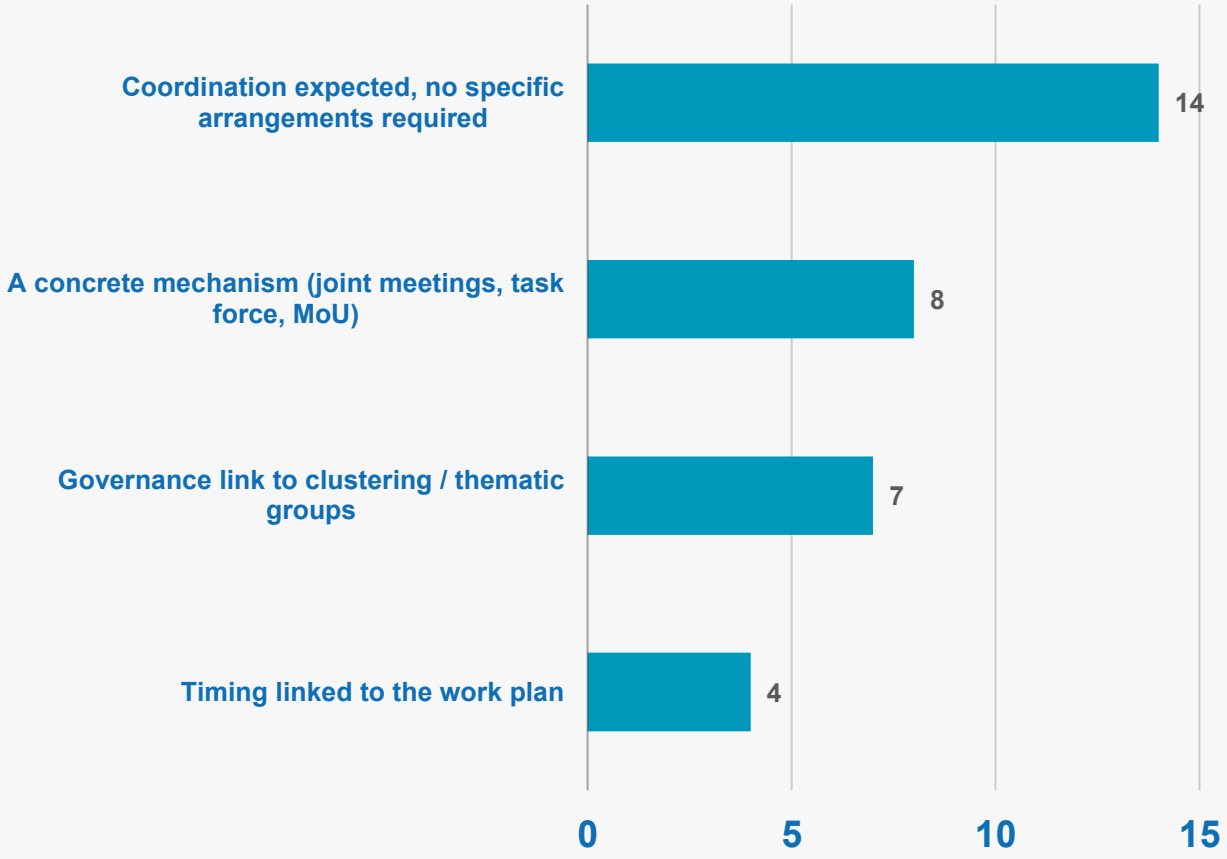
Maturity ladder

Only 2 of 26 programmes (8%) see genuine pooled results or joint activities. 11 stop at listing related initiatives or avoiding overlap, and 7 aren't sure. This is the headline gap for the AF revision.



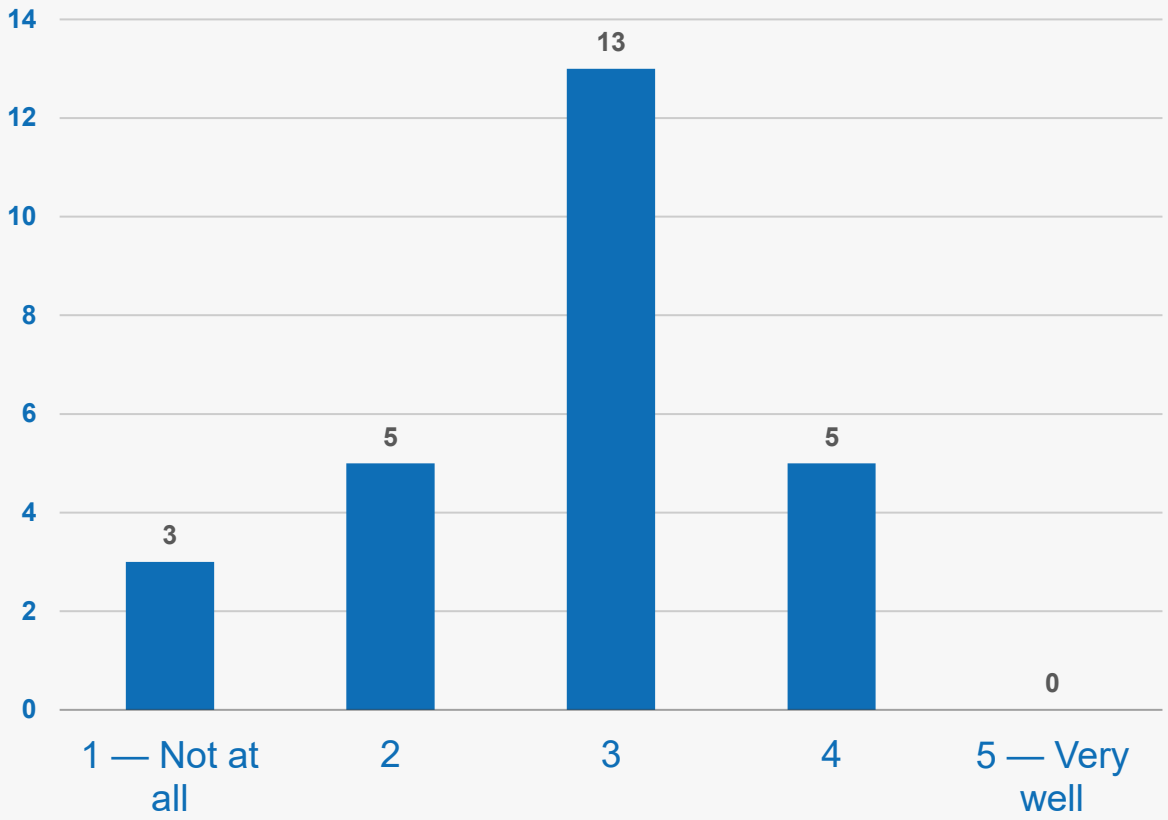
Working together

Fourteen of 26 programmes expect coordination “in principle” with no evidence required. Asking for a concrete mechanism — not just an intention — would close the gap between expectation and proof.



Tool check

C.2.6 scores 2.77 out of 5 on average: workable, not sharp. Responses cluster in the middle — 13 programmes rate it a 3, none a 5 — a sign for targeted rewording, not a full redesign.



Hardest to assess

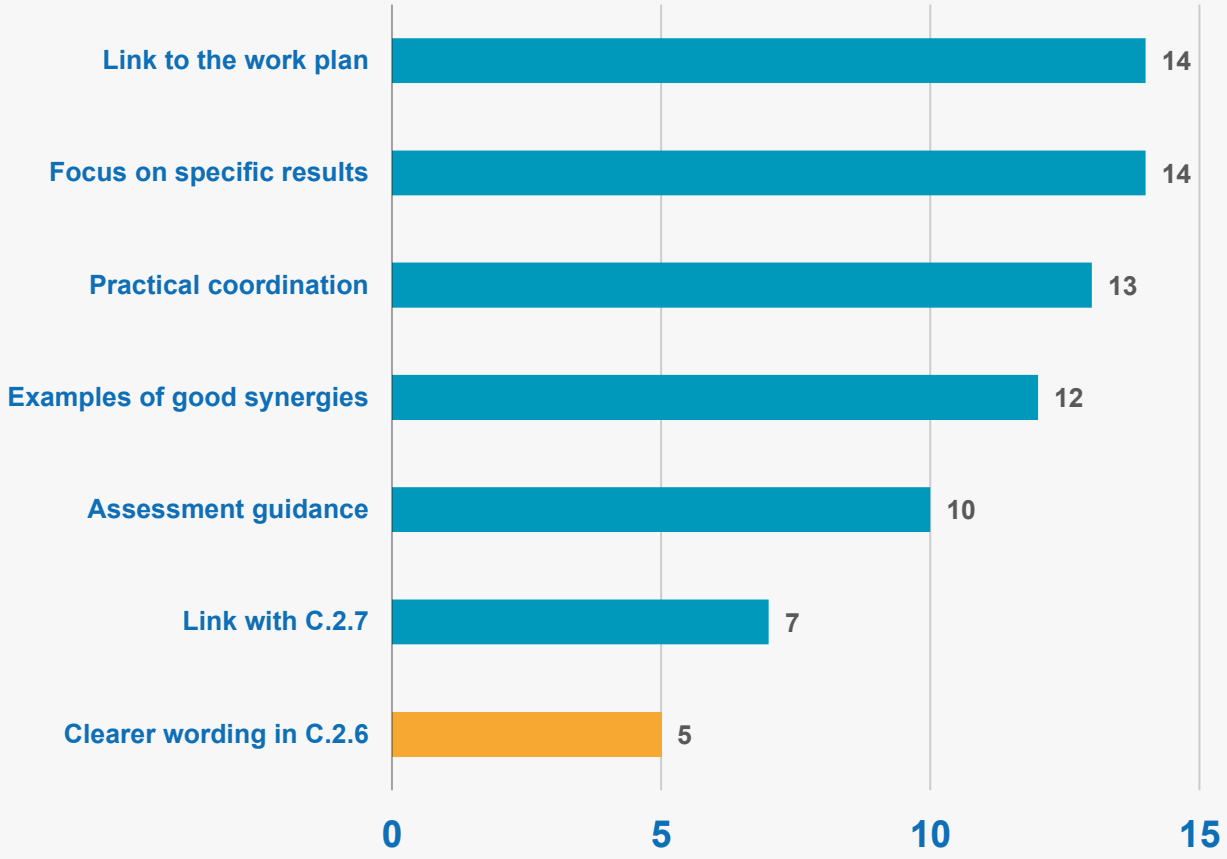
The Application Form is weakest at capturing combined effect (19% rate it well) and practical coordination (23%), against 35% for complementarity. Those are exactly the dimensions projects rarely reach.

Answer quality

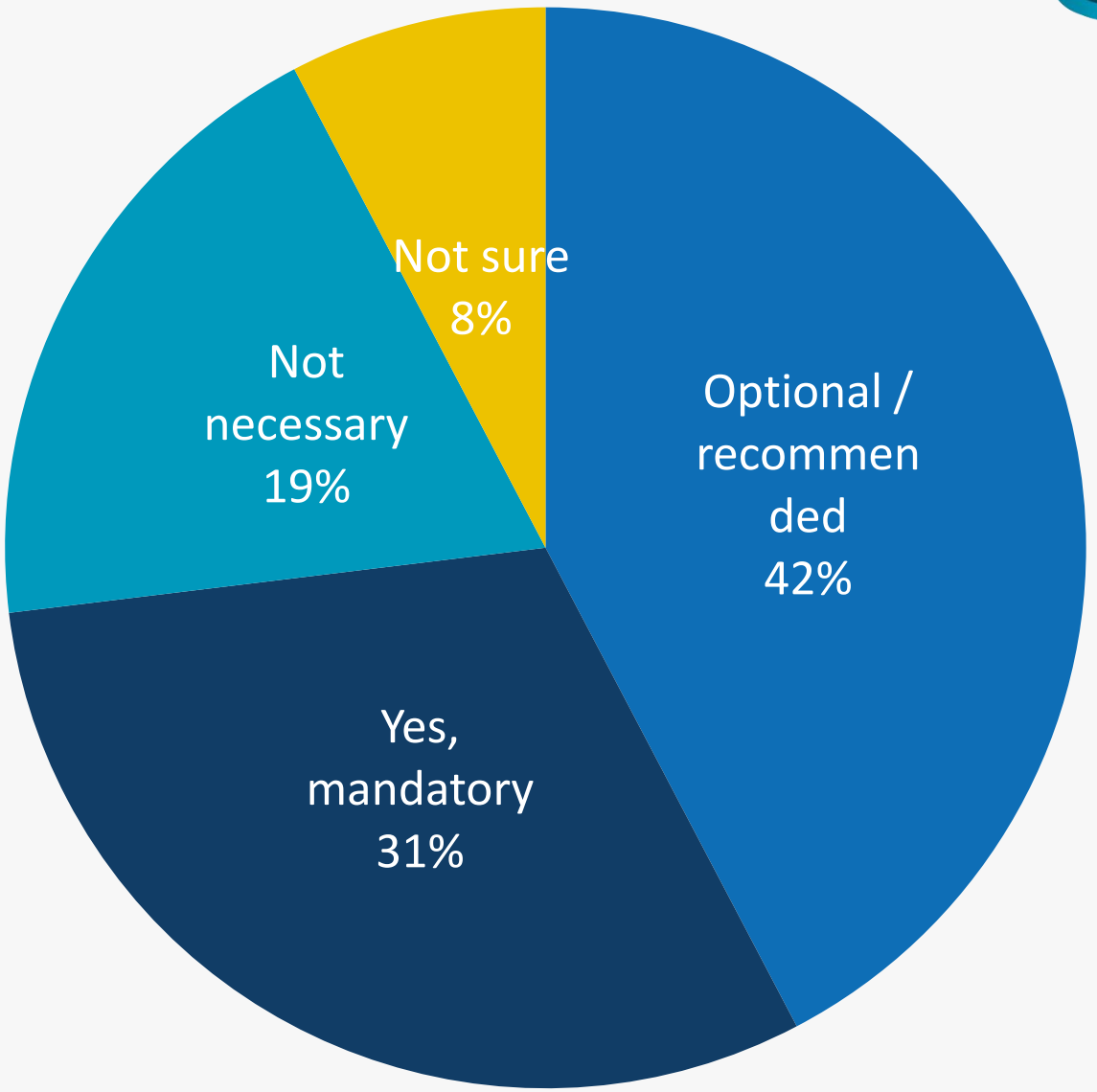
77% of programmes say applicants mostly just list related projects, without explaining the synergy. Weak answers aren't a rating problem — they're a writing problem the question itself should fix.

What helps

The programmes' own brief: link C.2.6 to the work plan (14), focus on specific results (14), and give concrete examples of "good" synergies (12). Only 5 ask for clearer wording — the fix is logic, not language.



Justify or not?



Views are genuinely split: 42% want a justification kept optional, 31% mandatory, 19% see no need.

Mandatory only for those programmes who wish? Any views?

Synergies: proposed solutions

One shift, with a proportionate requirement depending on the project and call

FROM
Listing similar projects

→

TO
Demonstrating relevant complementarity, credible coordination and added value

1
Widen the scope

Where relevant, not just projects: also programmes, funds, strategies, policies, initiatives and investments.

2
Ask the essentials

For each relevant synergy: relevance, planned complementarity or coordination, added value and avoiding unnecessary duplication.

3
Separate questions

C.2.6 external synergy and coordination. C.2.7 knowledge used as starting point. C.2.5 contribution to policies and strategies.

4
Quality, not count

Require credible evidence of complementarity and practical arrangements where coordination is claimed. Never count synergies.

5
Examples, not rules

Macro-regional and sea-basin strategies can be named in guidance where relevant to the programme geography.

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Integration: where should links appear?

Where would stronger links improve project design and assessment, and where would they create unnecessary burden?

AF / assessment section	Capitalisation	Synergies	Not at all
Project relevance (C.2)	○	○	○
Intervention logic	○	○	○
Partnership relevance (C.3) + Partner motivation and contribution (B.1.6)	○	○	○
Target groups / users (C.2.4)	○	○	○
Work plan (C.4)	○	○	○
Quality management (C.7.2) + Communication (C.7.3)	○	○	○
Budget / resources	○	○	○

Miro link

Conclusions and next steps

1. Interact has prepared suggestions for revisions/additions

Based on your inputs in the survey, possible directions and targeted questions

2. Participants provide written comments in Miro - Homework

Focus on what is workable, proportionate and useful for assessment

3. Inputs feed the in-person HIT discussion

Continuing the discussion on intervention logic, capitalisation, synergies and budget

4. Decision on further online follow-up

Plans for moving towards concrete template proposals in 2027

Next HIT Meeting

Intervention Logic, Capitalisation & Synergies, Budget

27-28 October, Zagreb

Join us to continue the discussion!

Thank you for being here!

Your opinion matters to us.

Please take a few minutes to provide us with feedback to help us improve our services.

HIT group meeting on Capitalisation and synergies in project design and assessment

Teams

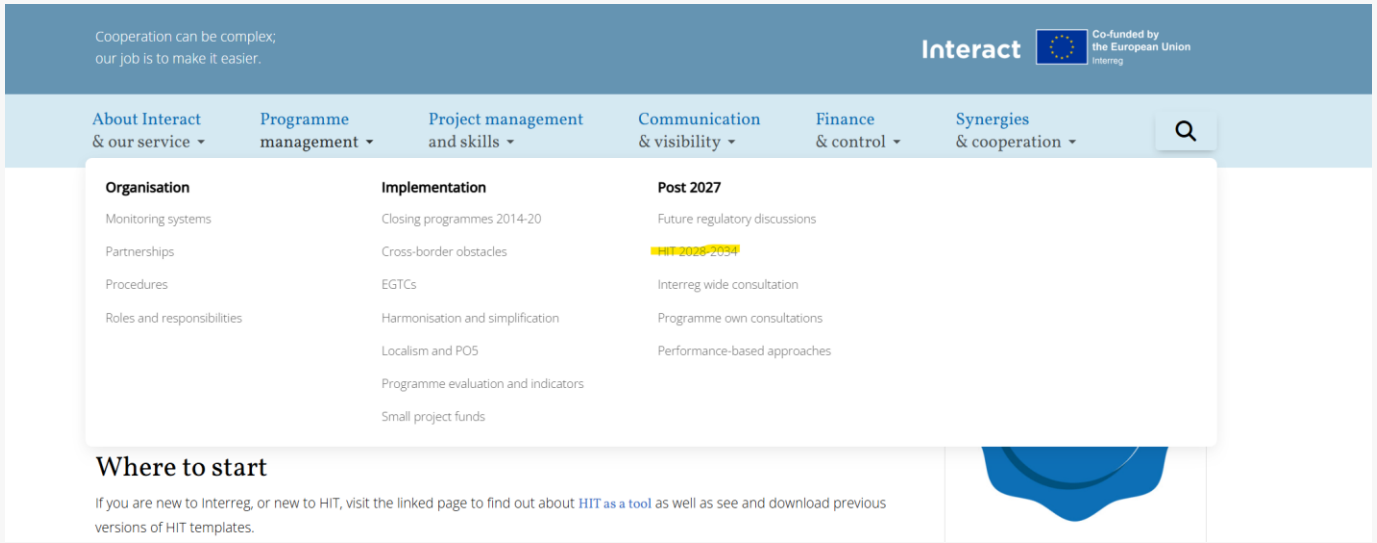
Central place for all activities, what can you find here:

- Relevant HIT groups
- Every event will be announced
- Every working document
- Final agreements & tools (surveys, etc).

Website

Main purpose:
- Inform about HIT
- List of HIT groups and events that will contribute to HIT
- Downloadable final HIT packages
- Link to Teams

Link: https://www.interact.eu/programme-management/post-2027/hit-2028-2034



Cooperation works

All materials will be available on:

1. Interact HIT teams and the dedicated channel
2. The final templates will also be available on the website

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