2028-2034

HIT group meeting

Intervention Logic, Capitalisation & Synergies, Budget

Katja Ecke, Nicolas Garnier, Daniela Minichberger, Besiana Ninka

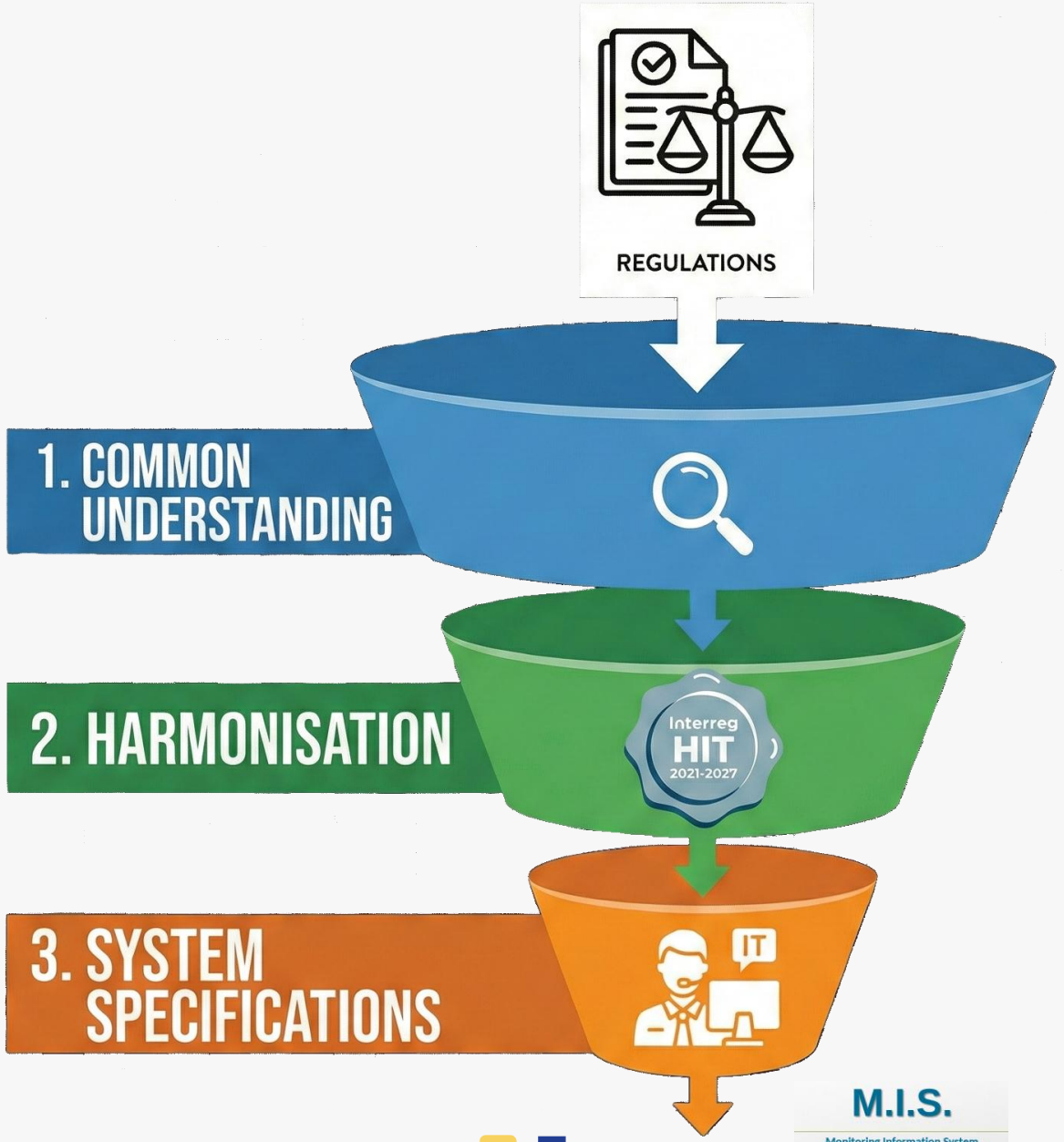
Interact | 27-28 October 2026

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Objective of HIT process

HIT goes beyond simply understanding the regulation and putting it in templates,
by harmonizing the how of our work through a shared language, we eliminate confusion for beneficiaries and empower the Interreg brand to stand strong as a professional, cohesive community.
HIT is the basis for IT tools development.



Jems

M.I.S. Monitoring Information System ERGORAMA

BAMOS+

INTERREG

...

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Index Effective cooperation through live data exchange

Agenda

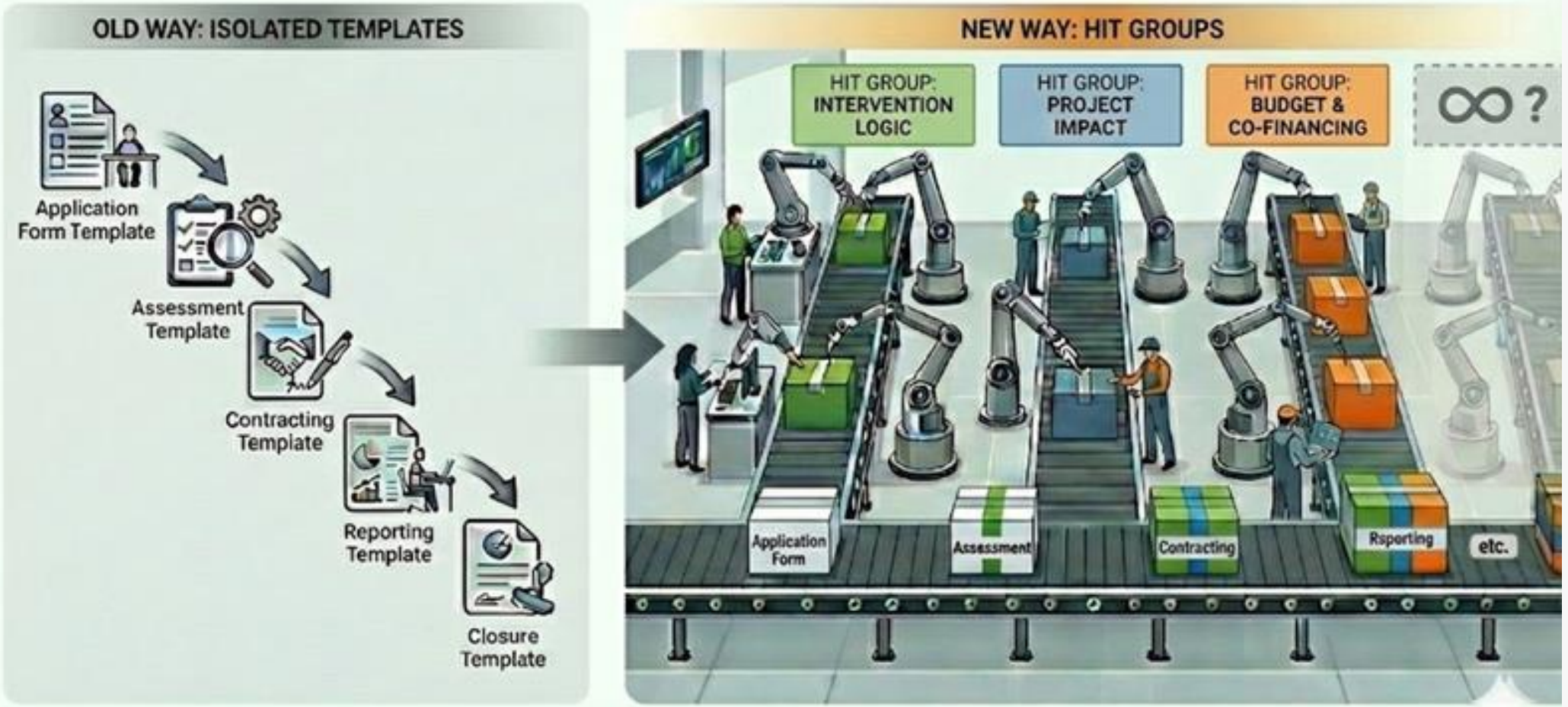
Day 1

Introduction & State of play	HIT-Intervention Logic	HIT Capitalisation & Synergies
Why now, and how do the topics connect	Application form feedback and open points on Intervention Logic	Capitalisation & Synergies in the application form: proposal, feedback and open discussion

Objectives

- **Consolidate a common understanding** of the HIT approach for Intervention Logic, Capitalisation & Synergies, and Budget.
- **Review and discuss feedback** received through the survey and previous online events.
- **Agree on open points and practical approaches** for reflecting these elements in the HIT application form.
- **Test the proposed approach in practice** using a real Interreg project example.
- Keeping records of **agreements** & **non-agreements**

Template-to-Template → HIT Groups



Source: Image generated with the support of AI

Bringing 3 HIT elements together

Budget

Intervention Logic



Capitalisation & Synergies

Partnership & Project Management

Upper or lower floor
Ice-breaker



Source: Images generated with the support of AI

Seating arrangements based on programmes' P-BA approaches

LEFT side: Upper level (9)

- Interreg Europe
- Interreg Estonia-Latvia
- Interreg Slovenia-Austria
- Interreg Baltic Sea Region
- Interreg Central Europe
- Interreg Slovenia-Hungary
- Danube Region Programme
- Interreg North-West Europe
- Interreg North Sea Region

RIGHT side: Upper+lower level (10)

- Interreg IPA Romania-Serbia
- Interreg Black Sea Basin
- Interreg Romania-Bulgaria
- Interreg Romania-Hungary
- Interreg NEXT Romania-Moldova
- Interreg Euro-MED
- Interreg Central Baltic
- Interreg South Baltic Programme
- Interreg Upper Rhine
- Interreg Slovenia-Croatia

For those who have not yet indicated their approach, please choose the side that best reflects your programme's current discussions.

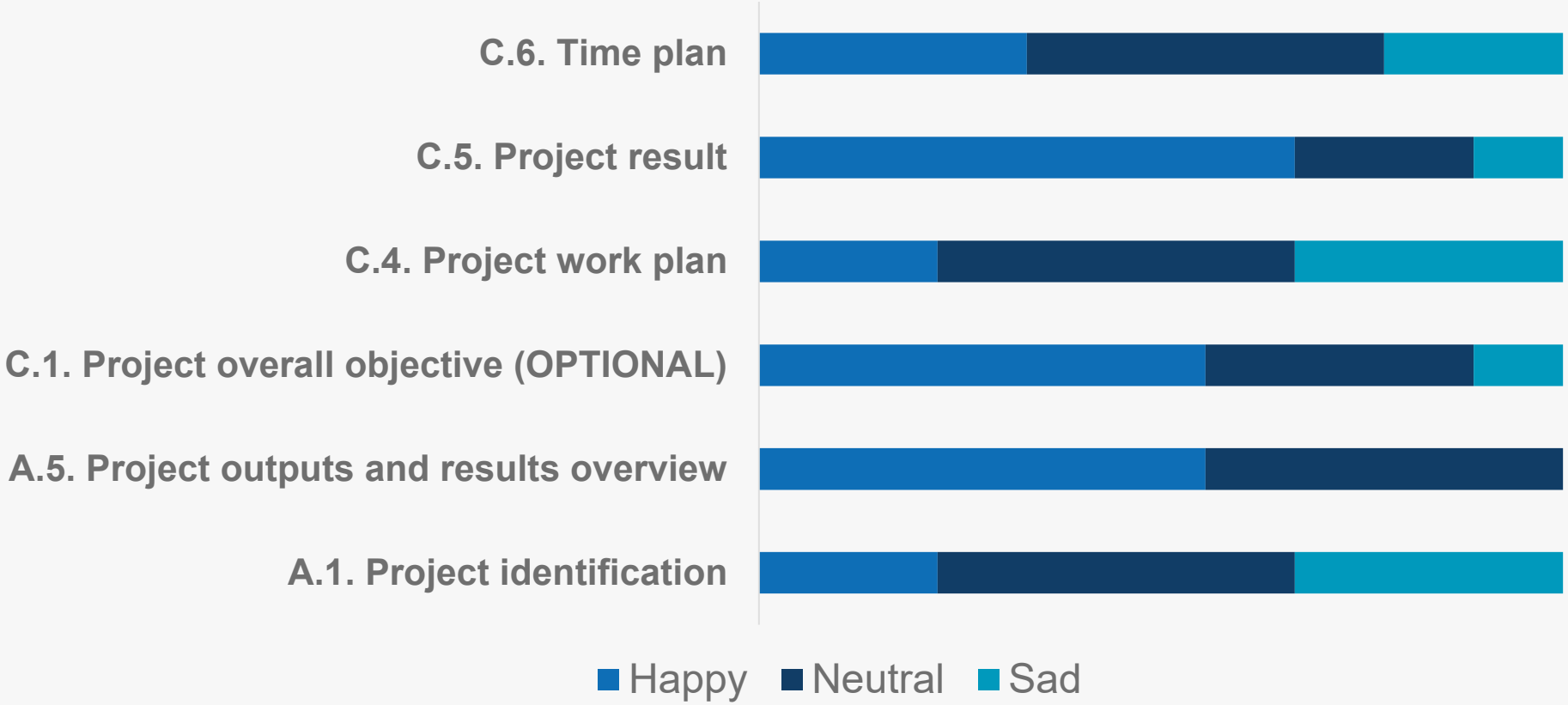


Intervention logic

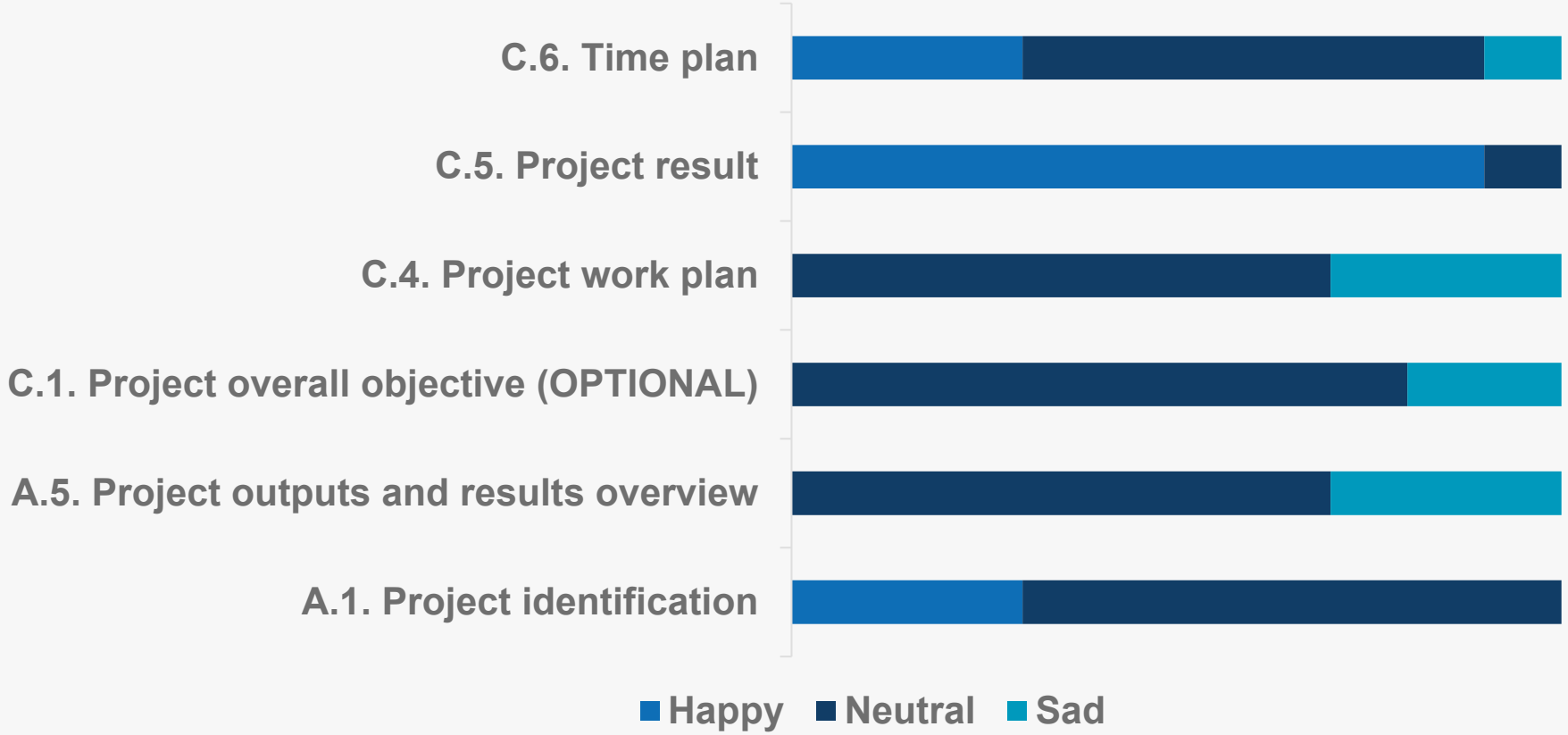
THANK YOU
for your time and efforts to provide your feedback in the survey!

-> We received 19 inputs from different programmes

Your feedback in a nutshell
Upper level



Your feedback in a nutshell
Upper + Lower level



A.1 Project identification Upper level

Where programmes broadly agree

- Use the programme measure as the main entry point.
- Simplify applicant inputs and avoid duplication.
- Prefer automatic population of related information (IF, SO, GO).

What needs discussion

- Which fields of the intervention logic should be visible?
- Shall the applicants select “programme measure”?
- What info should be filled in by the programme/project? And what should be auto-filled?
- Where should the project objective sit (A1/C1 or both and automatically prefilled)

A.1 Project identification Upper + Lower level

Where programmes broadly agree

- Use the programme measure as the main entry point.
- Simplify applicant inputs and avoid duplication.
- Prefer automatic population of related information (IF, SO, GO).

What needs discussion

- Which fields of the intervention logic should be visible?
- Shall the applicants select “programme measure”?
- What info should be filled in by the programme/project? And what should be auto-filled?
- Where should the project objective sit (A1/C1 or both and automatically prefilled)
- **Should a project contribute to more multiple measures, IF, SOs where relevant?**

A.1 Project identification

Project ID	Automatically generated according to programme rules in their monitoring system
Name of the lead partner organisation (original language or English language)	Automatically filled in from part B
Country of the lead partner organisation	Automatically filled in from part B
Project title Enter title here	Project acronym Enter acronym here
Project duration (no. of months)	Enter a number
~~Programme priority~~ ~~*Select from drop-down*~~	~~Programme priority specific objective~~ ~~*Select from drop-down of objectives that belong to the selected programme priority (links to Part C)*~~
Programme measure *Select from drop-down*	Intervention field *If the measure has more IF select from drop-down* *If the measure has only one IF it will be automatically generated according to programme intervention logic*
General objective *it will be automatically generated according to programme intervention logic*	Specific objective *it will be automatically generated according to programme intervention logic*
Project objective	Please enter

Following the discussions A.1 Project identification Upper + Lower level

Agreements

- Use the programme measure as the main entry point and project applicants shall select the measure through a drop down field.
- Other elements of the intervention logic (such as Intervention field, Specific Objective and General Objective) should not be visible for the project applicants.
- Project overall objective should only be filled in C1.

<u>To be further discussed</u>

- If the project proposal contributes to a measure with more than one intervention fields either the programme or the project applicant select the appropriate intervention field/output indicator.

A.5 Outputs and results overview Upper level

Where programmes broadly agree

- Keep an automatically populated overview of planned outputs and results.
- Keep the work plan alongside the overview of planned outputs and results.
- There should be optional fields by P-BA approach(es).

What needs discussion

- What should be the scope of A.5. overview?
  - indicators only, and/or
  - milestones, targets and/or
  - timing
  - payment-trigger indicators
  - any other information needed?
- Should A.5 follow the work plan (C.4.) or the time plan (C.6)?

A.5 Outputs and results overview Upper + Lower level

Where programmes broadly agree

- Keep an automatically populated overview of planned outputs and results.
- Keep the work plan alongside the overview of planned outputs and results.
- There should be optional fields by P-BA approach(es).
- **Show milestones and delivery dates**.

What needs discussion

- What should be the scope of A.5. overview?
  - indicators only, and/or
  - milestones, targets and/or
  - timing
  - payment-trigger indicator **and evidence for its fulfilment**
  - **milestones and delivery dates**
  - any other information needed?
- Should A.5 follow the work plan (C.4.) or the time plan (C.6)?

Agreements

A.5 Project outputs and result overview

Purpose and logic:

- This is an overview table based on data from outputs and results tables in the work plan. No new data is presented here.
- This table can be generated if programme output indicators and programme result indicators are linked when the programme is set up in the monitoring system. Each output indicator needs to have a corresponding result indicator for this table to work.

Programme output indicator	**Measurement unit**	**Aggregated value per programme output indicator**	**Project output number**	**Project output** (Output title)	**Output target value**	**Programme result indicator**	**Result indicator or baseline**	**Measurement unit**	**Result indicator target value**
From WPs	*From WPs*	*Automatically calculated*	*From WPs*	*From WPs*	*From WPs*	*From C.5*	*From C.5*	*From C.5*	*From C.5*
			From WPs	*From WPs*	*From WPs*		*From C.5*		
From WPs	*From WPs*	*Automatically calculated*	*From WPs*	*From WPs*	*From WPs*	*From C.5*	*From C.5*	*From C.5*	*From C.5*
			From WPs	*From WPs*	*From WPs*		*From C.5*		
			From WPs	*From WPs*	*From WPs*		*From C.5*	*From C.5*	

Following the discussions A.5 Outputs and results overview Upper + Lower level

Agreements

Table A5 should remain as it is and will be automatically populated with information from other parts of the project application form.

To be further discussed

The specific fields to be included in this table will be discussed in a separate meeting dedicated to reviewing all overview tables in the application form.

C.1 Project overall objective Upper level

Where programmes broadly agree

- Avoid repeating the same objective in A.1 (project identification) and C.1 (project objective).
- Link the project objective to the selected measure.
- Keep the wording of the guidance clear and applicant-friendly.

What needs discussion

- Should C.1 be mandatory, optional or omitted?
- How is C.1 different from A.1?

C.1 Project overall objective Upper + Lower level

Where programmes broadly agree

- Avoid repeating the same objective in A.1 (project identification) and C.1 (project objective).
- **In case it needs to be duplicated it should be auto-filled from A.1 where needed.**
- Link the project objective to the selected measure.
- Keep the wording of the guidance clear and applicant-friendly.

What needs discussion

- Should C.1 be mandatory, optional or omitted?
- How is C.1 different from A.1?
- **Shall we keep a single project objective or more?**
- **Are there overlaps with existing A.1 (project identification) and A.2. (project summary)?**

PART C – Project description

This part is about the description of the whole project. The overall logic (the story) is:

- What do you want to achieve? The big dream/goal/aim which is the overall objective.
- Why is this needed and for whom?
- How does it fit into the bigger picture?
- How will you do it? Activities!
- What will be delivered? Outputs!
- What will change at the end? Results!

C.1 Project overall objective (OPTIONAL)

Below, you can choose to which programme priority specific objective your project will contribute to. Now think about your main objective – what do you aim to achieve by the end of your project? Remember, your project needs to contribute to the programme objective. Your objective should:

- be realistic and achievable by the end of the project, or shortly thereafter;
- specify who needs project results and in which territory;
- be measurable – indicate the change you are aiming for.

Programme measure	Project overall objective
(automatically inserted once it is selected in section A.1)	*Enter your project overall objective here*

A.1 Project identification

Project ID	Automatically generated according to programme rules in their monitoring system
Name of the lead partner organisation (original language or English language)	Automatically filled in from part B
Country of the lead partner organisation	Automatically filled in from part B
Project title Enter title here	Project acronym Enter acronym here
Project duration (no. of months)	Enter a number
Programme priority *Select from drop-down*	Programme priority specific objective *Select from drop-down of objectives that belong to the selected programme priority (links to Part C)*
Programme measure *Select from drop-down*	Intervention field *If the measure has more IF select from drop-down* *If the measure has only one IF it will be automatically generated according to programme intervention logic*
General objective *it will be automatically generated according to programme intervention logic*	Specific objective *it will be automatically generated according to programme intervention logic*
Project objective	Please enter

A.2 Project summary

Please give a short overview of the project and describe:

- the common challenge of the programme area you are jointly tackling in your project;
- the overall objective of the project and the expected change your project will make to the current situation;
- the outputs you will produce and those who will benefit from them;
- the approach you plan to take and why a cross-border/transnational/inter-regional approach is needed;
- what is new/original about the project.

In programme language – if English is not a programme language [2000 characters]

In English language [2000 characters]

Following the discussions C.1 Project overall objective Upper + Lower level

Agreements

- The ‘Project objective’ should remain optional in C.1

C.4 Project work plan Upper level

Where programmes broadly agree

- Maintain a structured work plan.
- Clarify activities, outputs and responsibilities between project partners.
- Retain thematic work packages.

What needs discussion

- Objectives per work package or project phases?
- How should the work-package logic look like:
  - What are minimum fields for the work plan?
  - Must outputs and deliverables be distinct?
  - How should activites, deliverables and outputs be linked?
- Shall activities be linked to milestones and results?

C.4 Project work plan Lower level

What needs discussion

- **Shall we still have work packages or shall we consider output-driven AF?**
- **How should the “new” work-package logic look like:**
  - **What are minimum elements: activities, milestones, interim targets, deliverables, outputs,**
  - **How should evidence be provided on their achievements?**
  - **Are estimated timelines for achievement and payment triggers needed in C.4.? Or elsewhere?**

Let‘s develop the “new” C.4.

- **Activities:** description of activities
- **Timeline:** starting date/period – end date/period
- **Who is involved:** LP, PP1, PP2…
- **Who will benefit:** Target group
- **Interim milestones/interim targets:** description, timeline, evidence for achievements, who is contributing (LP, PP1,), measurement unit, value,
- **Final milestone:** description, timeline, evidence for achievements, who is contributing (LP, PP1,), measurement unit, target (nr)
- **Final target = Output indicator:** description, timeline, baseline, evidence for achievements, who is contributing (LP, PP1,), measurement unit, target (nr)
- **Result indicator:** description, timeline, baseline, evidence for achievements, who is contributing (LP, PP1,), measurement unit, target (nr)

Following the discussions C.4 Work plan Upper level

Agreements

- Work plan including work package (WP) shall remain as it is in 2021-2027.
- It was agreed to start with outputs followed by activities, and deliverables. Programme outputs do not necessarily need to be linked to each individual work package. Instead, they could be defined and presented at the overall project level.
- The following elements may be included but should not be mandatory:
  - Communication-related WP objectives
  - Assignment of responsibilities at the activity, deliverable, or output level

<u>To be further discussed</u>

- The linkages of the different elements of the workplan on upper level needs further discussion and an final agreement.

Following the discussions C.4 Work plan Lower level

Agreements

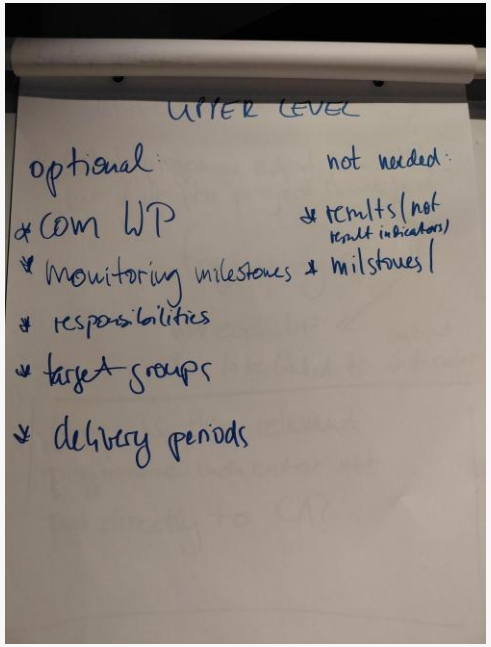
- Work plan including work package (WP) is needed on lower level;
- It was agreed to start with outputs followed by activities, deliverables, milestones and targets. Programme outputs do not necessarily need to be linked to each individual work package. Instead, they could be defined and presented at the overall project level.
- The following elements may be included but should remain optional. To avoid duplication, information already provided in the budget section (C.?) should be automatically populated.
  - Interim milestones and targets
  - Final milestones
  - Target groups
  - More detailed implementation timelines (e.g. quarterly reporting periods)

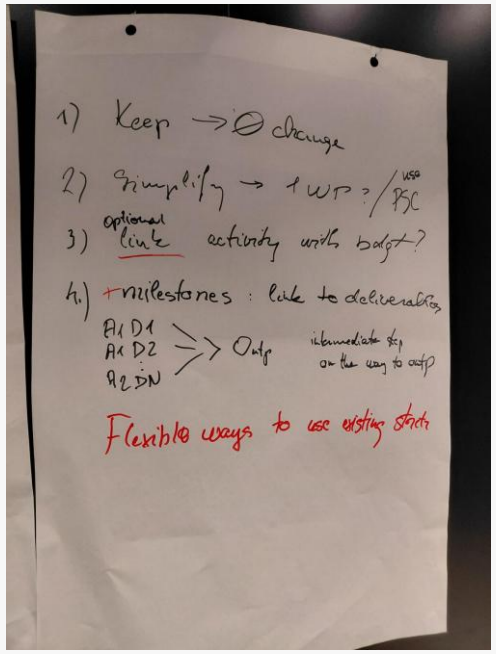
<u>To be further discussed</u>

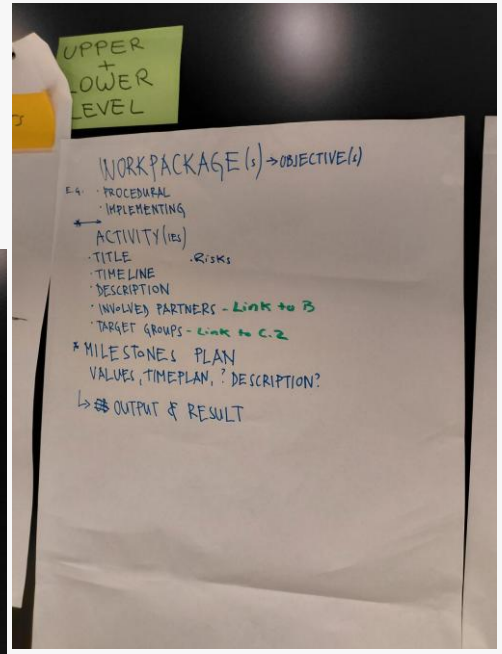
- The linkages of the different elements of the workplan on lower level needs further discussion and a final agreement.

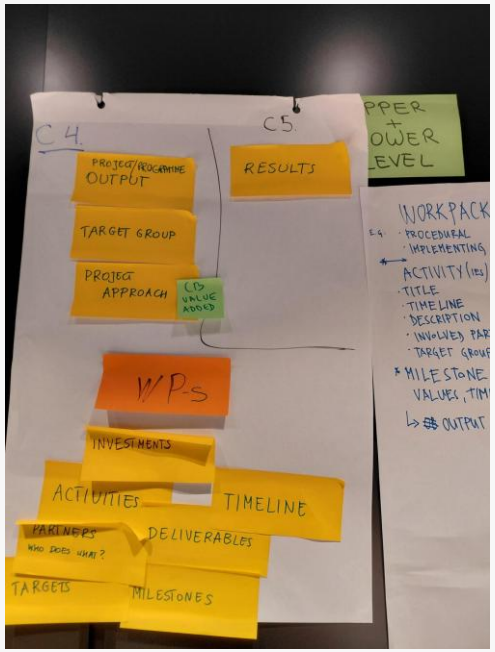
Let‘s develop the “new” C.4. Group work











C.5 Project results Upper level

Where programmes broadly agree

- Keep the information relevant.
- Avoid unnecessary or duplicated fields.

What needs discussion

- Should the results table be separated or merged with “new” C.4.?
- Are baselines and delivery periods useful?

C.5 Project results Upper + Lower level

Where programmes broadly agree

- Keep the information relevant.
- Avoid unnecessary or duplicated fields.

What needs discussion

- Should the results table be separated or merged with “new” C.4.?
- Are baselines and delivery periods useful?

Result Nr.	Programme result indicator	Measurement unit	Result description	Result indicator baseline	Result indicator target value	Delivery period (OPTIONAL)
RI 1	*Choose from the drop-down list*	*Automatic*	*Describe in more detail the change expected*	*Automatically retrieved from programme data*	*Enter the number*	*Drop-down*
RI 2	*Choose from the drop-down list*	*Automatic*	*Describe in more detail the change expected*	*Automatically retrieved from programme data*	*Enter the number*	*Drop-down*
RI 3	*Choose from the drop-down list*	*Automatic*	*Describe in more detail the change expected*	*Automatically retrieved from programme data*	*Enter the number*	*Drop-down*

Following the discussions C.5 Project results Upper + Lower level

Agreements

- Results table should remain under C.5. (Project results) and be separated from the C.4. work plan
- Baselines and delivery periods should be kept, as long as the baseline can be zero

.

<u>To be further discussed</u>

- If the project proposal contributes to an output indicators linked to more than one result indicator either the programme or the project applicant select the appropriate result indicator.

C.6 Time plan Upper level

Where programmes broadly agree

- Make the timeline more detailed and useful for monitoring.
- Consider including milestones and intermediate targets.
- Allow flexibility in the level of detail

What needs discussion

- What are minimum fields for the time plan?
- Shall the timeline be per month or reporting period, or defined by the programmes?

C.6 Time plan
Upper + Lower level

Where programmes broadly agree

- Make the timeline more detailed and useful for monitoring.
- Consider including milestones and intermediate targets.
- Allow flexibility in the level of detail

What needs discussion

- What are minimum fields for the time plan?
- Shall the timeline be per month or reporting period, or defined by the programmes?

Following the discussions C.6 Time plan Upper + Lower level

Agreements

- Allow flexibility in the level of detail:
  - timeline be per month or reporting period, or defined by the programmes
  - allow including milestones and intermediate targets.

… some food for thoughts

“Are we redesigning the AF to help applicants plan better projects and explain how they will deliver meaningful achievements, or primarily to collect the information programmes need to administer PBA payments? Ideally, the revised HIT AF would achieve both.”



Capitalisation & Synergies

Today's purpose

What we will do

- Discuss considerations based on current experience
- Identify improvement directions for the AF

What we will not do

- Final wording or decisions today
- .

What we need from you

Confirm, nuance or challenge the proposals and feedback received, based on your programme experience

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**.

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

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 capitalisation and synergies together?

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

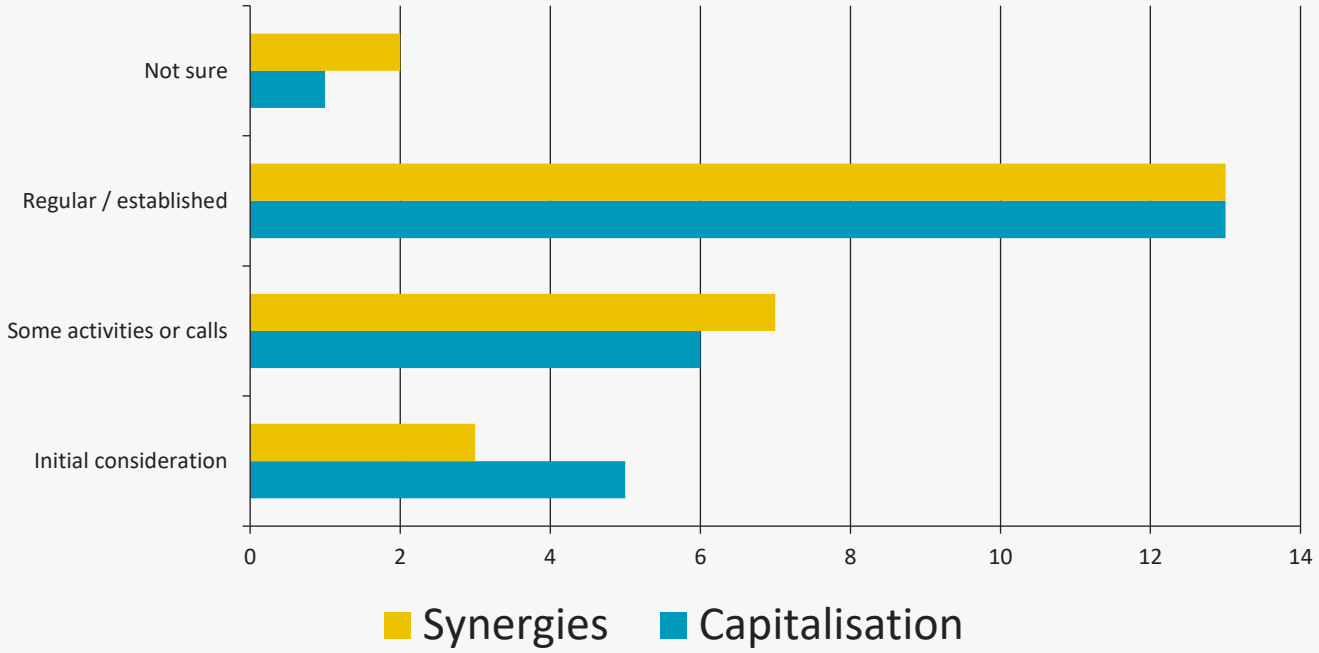
Shared concern	Capitalisation angle	Synergies angle
Building on what exists	Previous knowledge, results, practices	Other projects, funds, strategies
Avoiding isolated projects and duplication	Reuse, uptake, transfer	Complementarity and coordination
Strengthening impact	Lasting use, durability, wider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

Survey learning points

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Lens 1: programme maturity and diversity

A diverse group, but not a blank page.



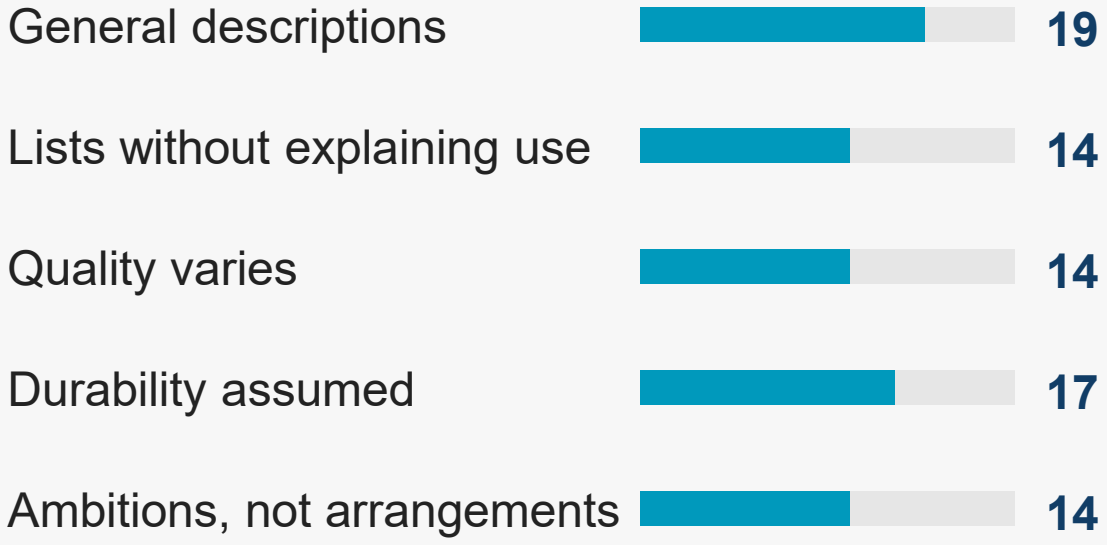
Learning point: Enough experience to learn from existing practice; enough diversity to keep future HIT proportionate.

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

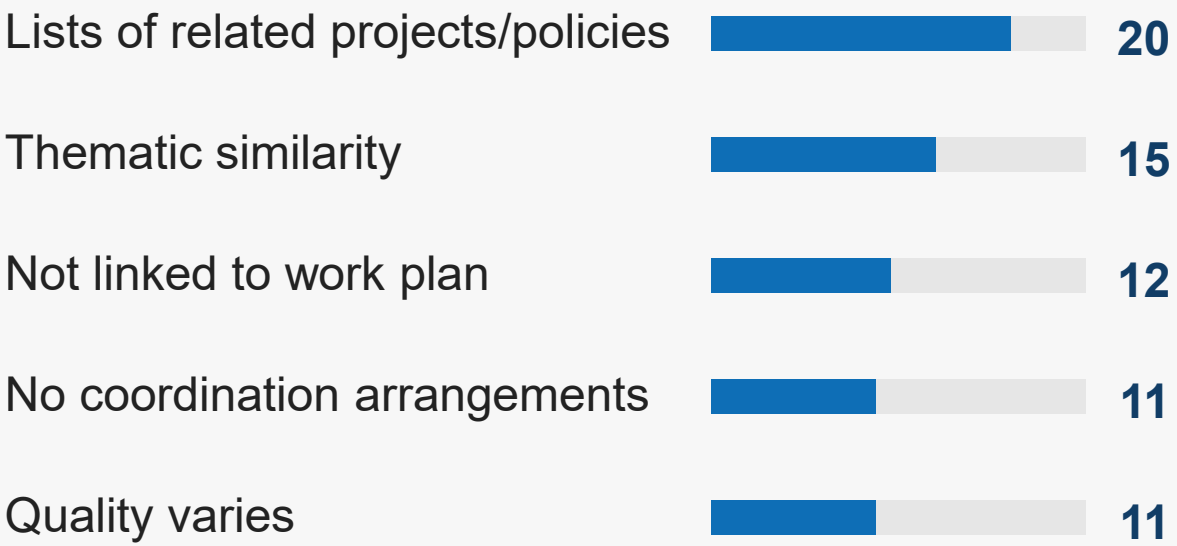
Lens 2: what applicants currently provide

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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Where the AF asks now

Context	C.2.5 policy contribution, C.2.6 synergies and C.2.7 available knowledge. These questions establish relevance and starting points.
People, work and budget	B.1.6 partner contribution, C.2.4 target groups and C.3 partnership. C.4 describes activities and outputs. + Budget- how much does it cost
Long-term plans	C.8 asks about ownership, durability and transferability. C.5 results and C.7 management provide consistency checks.

How we will work

Reflect	Each round starts with a review of proposals and feedback. Take one minute to form your own view before the table conversation.
Discuss	Every table addresses all four bundles. Aim for short wording or a concrete action, with the reason.
Capture	Add notes per table per round. Highlight the improvements you need.

How we will work – 4 areas

Bundle	Sections	Focus
1. Synergies	C.2.5 and C.2.6	Policy contribution and useful connections with projects, strategies or initiatives; clarity, scope and proportionate expectations.
2. Capitalisation: building on knowledge and preparing outputs for use	C.2.7	What will be reused or adapted, what the project adds, and how outputs are prepared for uptake.
3. Long-term plans: ownership, durability and transferability	C.8.1-C.8.3	Responsibility, continued use, transfer potential and what can realistically be explained at application.
4. Partnership and users, work plan, budget – considerations cross-links to both Cap & Syn	B.1.6, C.2.4, C.3, C.4, C.5	Individual and collective partnership rationale, relevant users and their involvement



Synergies block

From thematic similarity to complementarity and added value

What minimum information shows that a synergy is meaningful?

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*

PROPOSED ADDITION TO C.2.5

C.2.5 How does the project contribute to wider strategies and policies? And how will the project make use of?

Identify the strategic synergies with policies and strategies that are **most relevant** to your project. These can be past or ongoing, and at EU, national or regional level. For each one, explain:

- why the connection is relevant?
- what exactly the project will contribute to?
- what concrete added value this will create?
- how it connects with the bigger picture?

Proposed structure (one row per synergy)

Linked policy, strategy, fund, programme, project or investment	Relevance for the project	Planned synergy and added value	Link to the work plan
Name and short description	*Why this link matters for the project's objectives*	*what exactly the project will contribute to, what concrete added value this will create and how it connects with the bigger picture*	*WP / activity / output reference*

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*

PROPOSED REVISED WORDING FOR C.2.6

C.2.6 Which synergies with relevant funds, programmes, projects or investments will the project develop or make use of?

Identify the policies, strategies, funds, programmes, projects, initiatives or investments that are **most relevant** to your project. These can be past or ongoing, and at EU, national or regional level. For each one, explain:

- why the connection is relevant?
- what exactly the project will connect, coordinate, complement or build on?
- what concrete added value this will create?
- how unnecessary duplication will be avoided?

Where applicable, show where the synergy becomes operational in the project (work package, activity or output).

Proposed structure (one row per synergy)

Linked policy, strategy, fund, programme, project or investment	Relevance for the project	Planned synergy and added value	Link to the work plan
Name and short description	*Why this link matters for the project's objectives*	*What will be connected, coordinated, complemented or used; the concrete added value; how duplication is avoided*	*WP / activity / output reference*

Synergies: proposals to review

Two questions	Keep policy contribution and practical connections distinct. Favour clearer separate purposes.
One question	Combine the sections with clear prompts for different types of connection. **Programme responsibility to identify relevant strategies** (drop-down options)
Lighter approach	Reduce dedicated requirements and use context or activities where relevant, focusing on highlighting actual contribution.

Synergies: table discussion

10 minutes at your table

Which structure helps applicants explain useful connections without listing/repeating information?

What minimum information should they give about the connection, its contribution and how it works?



Synergies: Zagreb recap

Discussion and agreed direction for the exercise AF

Discussion	Use plain, meaningful questions. Focus on relevant connections and concrete contributions, including national and regional policies. Keep the information useful for programmes and projects.
C.2.5 retained	Keep a short table with a maximum of three relevant strategies or policies. Explain the relevance of each connection and the project's planned contribution.
Operational links	Bring connections with projects and initiatives together with existing knowledge in a merged C.2.6. Refer to relevant work packages and activities to show how these links become operational.

Monitoring of the information requested in the AF also needs further consideration.



Capitalisation block

From previous knowledge to uptake, transfer and lasting use

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

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

PROPOSED REVISED WORDING FOR C.2.7

Proposed revised title: C.2.7 How does the project build on and advance existing knowledge and results?

Describe the knowledge, evidence, lessons learned, methods, tools, services or other results that form the starting point for the project. Explain what the project will reuse, adapt, combine or further develop, for which needs and territories, and what added value the project will create beyond the existing state of play.

Proposed structure

Existing knowledge, result or lesson	How it will be reused or adapted	What the project will add or advance
Enter text	*Enter text*	*Enter text*

C.2.7: proposal and choices

Starting point	Proposed table: existing knowledge, result or lesson. Explain what is relevant to build upon for the needs of this project.
Reuse and advance	Proposed columns: how it will be reused or adapted, and what the project will add or advance. A previous Interreg project is not required.
Feedback	Go beyond lists of past projects. Keep the question clear, protect innovation and distinguish the knowledge base from synergy connections.

Capitalisation: table discussion

10 minutes at your table

What should C.2.7 ask about the knowledge or outputs applicants will reuse or adapt, and the added value of the project?

Would a short instruction or the proposed table make this clearer? How can we leave room for innovation and newcomers?



Capitalisation: Zagreb recap

Discussion and agreed direction for the exercise AF

Discussion	C.2.6 and C.2.7 overlap. Simplify the language and start with what the project will build on. Substantiate the answer through the work plan.
Merged C.2.6	“Which past or current EU or other projects/initiatives will you build on? Be specific on outputs you will build on.”
Table and work plan	Identify existing knowledge, projects or lessons and the project’s added value. Explain reuse or further development and relevant synergies, with references to work packages and activities.

The merged section brings building on existing work and synergies into one dedicated place.

3. Long-term plans

C.8.1 Ownership	Who will be responsible for key outputs, and how will organisations integrate them into their work?
C.8.2 Durability	Who will continue using them after closure, for what purpose and with which arrangements?
C.8.3 Transferability	What could others reuse or adapt in a different context? What conditions or actions would enable 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

PROPOSED REVISED WORDING FOR C.8.1

C.8.1 Ownership

For each key output or result, identify the organisation(s) that will own, manage or be responsible for it during and after the project.

Explain how the output or result will be integrated into the regular work of the responsible organisation(s), including any financial, institutional, legal, technical, access or intellectual property arrangements required to keep it available and usable.

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

PROPOSED REVISED WORDING FOR C.8.2

C.8.2 Durability

Explain who will continue to use the key outputs or results after project closure, for what purpose, and what decisions, resources, capacities or arrangements will be required.

Describe the actions and commitments that will be secured during project implementation to enable this continued use and lasting effect.

28-34

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

PROPOSED REVISED WORDING FOR C.8.3

C.8.3 Transferability

Identify which key outputs or results have the potential to be adapted, reused or scaled by organisations, sectors or territories beyond the project partnership.

Explain who the intended users or organisations able to adopt the results are, how they and relevant multipliers will be involved during implementation, what adaptation or enabling conditions are expected, and how the project will make the outputs or results accessible and usable for them.

Not every output needs to be transferable. Where transferability is claimed, applicants should identify potential adopters, the need or context in which the output could be reused, necessary adaptations, documentation and access requirements, capacity needs, and actions to engage potential adopters before project closure.

Long-term plans: proposed options for reflection

Three questions	Retain C.8.1-C.8.3 with shorter, distinct prompts. Clarify which key outputs each answer concerns.
Combined C.8	Bring related questions together. Suggest combinations to reduce overlap.
Around outputs	Attach relevant information to outputs and references throughout the work plan. Favour output-specific detail – an output-focused AF.

Long-term plans: table discussion

15 minutes at your table

Which structure gives a credible picture of responsibility, continued use and transfer potential?

What should applicants explain now? What should they refine during implementation?



Long-term plans: Zagreb recap

Three separate questions, with simpler wording and links to the work plan

C.8.1 Ownership	Identify who will own, manage or take responsibility for key achievements during and after the project, and how they will integrate them into their regular work.
C.8.2 Durability / Continued use	Explain who will continue using the achievements and for what purpose. Link users to target groups, and the actions and commitments to the work plan.
C.8.3 Transferability	Explain what makes the solution suitable for reuse or adaptation beyond the partnership. Identify relevant achievements and connect their transfer potential to target groups and the work plan.

Cover key achievements beyond indicator outputs. Keep expectations realistic at application stage. Terminology remains open, but should not mention “results”, rather outputs, solutions or achievements

Break
Back at 15.45



4. Cap & Syn throughout the AF

People	B.1.6, C.2.4 and C.3: which competences and organisations make reuse, uptake or useful connections possible?
Work plan	C.4: which activities turn those intentions into work? Who is involved, who is responsible and when will it happen?
Resources	Budget: do the relevant activities have proportionate staff time and other resources? How does this connect with the dedicated sections?

Partners and users: proposal status

B.1.6 Partner motivation and contribution	Make the first two questions mandatory. Clarify each partner's relevant contribution. Prior EU or international project experience can remain optional.
C.2.4 Target groups	"Who needs to be involved, who will use and benefit from the project outputs and results?" Add roles (drop-down) and planned involvement.
C.3 Project partnership	"Explain why the partnership as a whole is fit for purpose and how the partners complement each other." Partnership structure and its strategic fit for project implementation

C.2.4 Who will benefit from your project outputs?

In the first column of each row, please select one of the pre-defined target groups from the drop-down list. In the second column, explain in more detail exactly who will benefit from your project. For example, if you choose the category *education*, you need to explain which specific schools or groups of schools and in which territory.

Target group	Specification
Select from drop-down	*Enter text*
Select from drop-down	*Enter text*
Select from drop-down	*Enter text*

PROPOSED UPDATE TO C.2.4

Proposed revised title: C.2.4 Who needs to be involved, who will use and benefit from the project outputs and results?

Identify the specific target groups and stakeholders relevant to the project. Explain their role in relation to the project outputs and results and how they will be involved.

Relevant roles may include contributor or co-developer; tester or validator; direct user or end user; organisation able to adopt, embed, finance or scale a result; multiplier, intermediary or policy actor; and wider beneficiary. Relevant for both Synergies and capitalisation

Proposed structure

Target group	Specification	Role in relation to outputs and results	Planned involvement
Enter text	*Enter text*	*Enter text*	*Enter text*

Partners and users: choices

What needs a separate answer?

Simplify the competence question and record individual tasks once. Keep prior EU project experience optional so newcomers can participate.

Retain a short collective partnership rationale, or rely on information about partners and activities? C.3 has support, with reservations about repetition.

In C.2.4, identify users and their role. Decide which engagement detail belongs in the work plan.

Work plan: proposal status

Activities	Capitalisation proposal: stakeholder engagement, validation and preparation for use. Synergies proposal: what activity, who is responsible, when, and which output or result it supports.
Outputs	Proposed field: “Intended use and users”. Explain who will use or adopt the output and for what purpose. Alternative: include this in the existing output description.
Connections	Activities should reflect relevant commitments from C.2.5-C.2.7 and C.8. Link the organisations and roles identified in B.1.6, C.2.4 and C.3.

Please describe the activities by which the project achieves the above project specific objective and related communication objective(s). Add deliverables to activities – see programme rules.

PROPOSED ADDITION TO THE ACTIVITY INSTRUCTION

Include activities needed to engage relevant stakeholders, test and validate outputs, collect user feedback, adapt outputs to different contexts, transfer knowledge and prepare continued use after project closure.

Based on the activities you need to implement to achieve the specific objective in this work package, please list below the outputs that will be delivered during the implementation.

Output Nr.	Programme output indicator	Measurement unit	Output title	Output description	Output target value	Delivery period
OI 1.1	*Choose from the drop-down list*	*Automatic*	*Enter text*	*Describe in more detail what will be delivered*	*Enter the number*	*Drop-down*

PROPOSED ADDITION TO THE OUTPUT TABLE

Suggested new field: Intended use and users

Identify who is expected to use or adopt the output, for what purpose, and how the output will be tested, validated and prepared for uptake or transfer.

Where adding a separate field is technically difficult, include this requirement explicitly in the existing output-description prompt.

C.5 Project results

What do you expect to change because of the activities you plan to implement and the outputs you plan to deliver? Please take a look at the programme result indicators and select those that you will contribute to.

Result Nr.	Programme result indicator	Measurement unit	Result description	Result indicator baseline	Result indicator target value	Delivery period (OPTIONAL)
RI 1	*Choose from the drop-down list*	*Automatic*	*Describe in more detail the change expected*	*Automatically retrieved from programme data*	*Enter the number*	*Drop-down*

PROPOSED REVISED INSTRUCTION FOR THE RESULT DESCRIPTION

Describe the change expected as a consequence of the use or uptake of the project outputs. Specify who is expected to change what, in which territory, and how the project outputs contribute to that change.

This should strengthen the distinction between an output being delivered, an output being used, and a result or change occurring because of that use.

C.4: choices from the feedback

Where to ask	Activity guidance has broad support. A longer purpose statement is less settled. Short signpost, practical instructions beside activities, or both?
Intended use	Many favour the existing output description. Or a separate uptake column. Described in target group or output?
Proportionate detail	Include partners and users where relevant. Distinguish preparation for uptake from further adaptation that may depend on a dedicated call.

Activities and budget: the link

Proposal	Use the relevant activities and normal budget to show the resources needed for coordination, stakeholder involvement and preparation for use or transfer.
Feedback	Broad support for a clear activity-resource link. Programme comments favour proportionate commitments and flexibility for project or call type.
Question	Is an explicit link enough? Where should it appear so applicants explain responsibilities and resources once? Is a dedicated work package useful in some cases?

A clear place for each answer

Dedicated sections	C.2.5-C.2.7 establish relevant connections and starting knowledge. C.8 explains responsibility, continued use and transfer potential.
Implementation	B.1.6, C.2.4 and C.3 explain who can deliver and use the work. C.4 sets out activities and intended use. The budget reflects the resources required.
Consistency checks	C.5: output delivery, use and change. C.7: quality and communication support the approach. Cross-reference or reuse information wherever another answer already provides it.

Across the AF: table discussion

Two 10-minute steps

Step 1: trace the links. How should users, partner roles, activities and resources support the capitalisation and synergy intentions in the dedicated sections?

Step 2: refine the requests. What should each section ask, where should information appear once, and which cross-reference or repeated question could be improved?

Submit notes: people and roles, activities and outputs, resources and coherence. Give the AF references and short wording or a concrete action.

Use dots to identify the suggestions that most need discussion.

Across the AF: Zagreb recap

Agreed direction focused on target groups, the work plan and results

C.2.4 Target groups	Keep the target group and specification fields. Add role and involvement, with a reference to the work plan. Clarify who contributes, uses or benefits from the achievements.
C.4 Work plan	Reflect capitalisation and synergies in activities and resources. Describe intended users and use in output or activity descriptions, including testing, validation and preparation for uptake.
C.5 Results	Explain the change expected from using project outputs. Distinguish output delivery, actual use and the resulting change.

Partnership was not covered. Assessment will be addressed alongside the AF at a later stage. Monitoring also needs follow-up.



Anything that we missed?

Agenda

Day 2

HIT Budget	Working with the application form	Wrap up and next steps
Budget in the application form: proposal, feedback and open discussion	Practical exercise: filling in an application form	



Budget

A few reminders

1. We do not have a stable set of rules, yet – on main issues the legislators have diverting positions (i.e. how to control the achievements (milestones/targets) as payment triggers).
2. P-BA for project implementation might look like „draft-budget“ methodology, but it is not!
3. P-BA for projects follows the same approach as for programmes:
    - Costing = budget needed for the successful implementation of the project → the budget approved is an obligation (value for money; ex-ante)
    - Pay-out values for milestones and targets (interim & final) = payment triggers (currently 0-1 situation)

Template

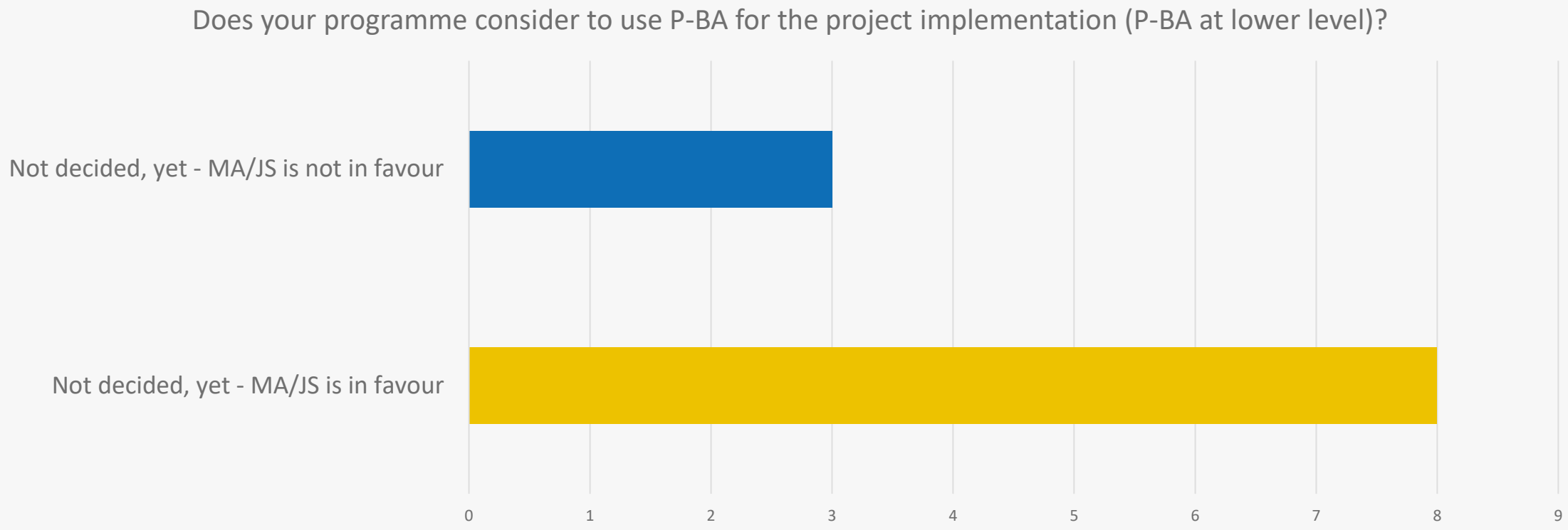
The proposed template was based on:

1. Discussions during 1st HIT meeting

Survey results – general observations & feedback

1. 11 programmes
2. Link between costing (work packages & budget) and milestones and targets (pay-out values/ payment triggers) not clear
3. Decisions from 1st HIT meeting reversed

P-BA for project implementation?



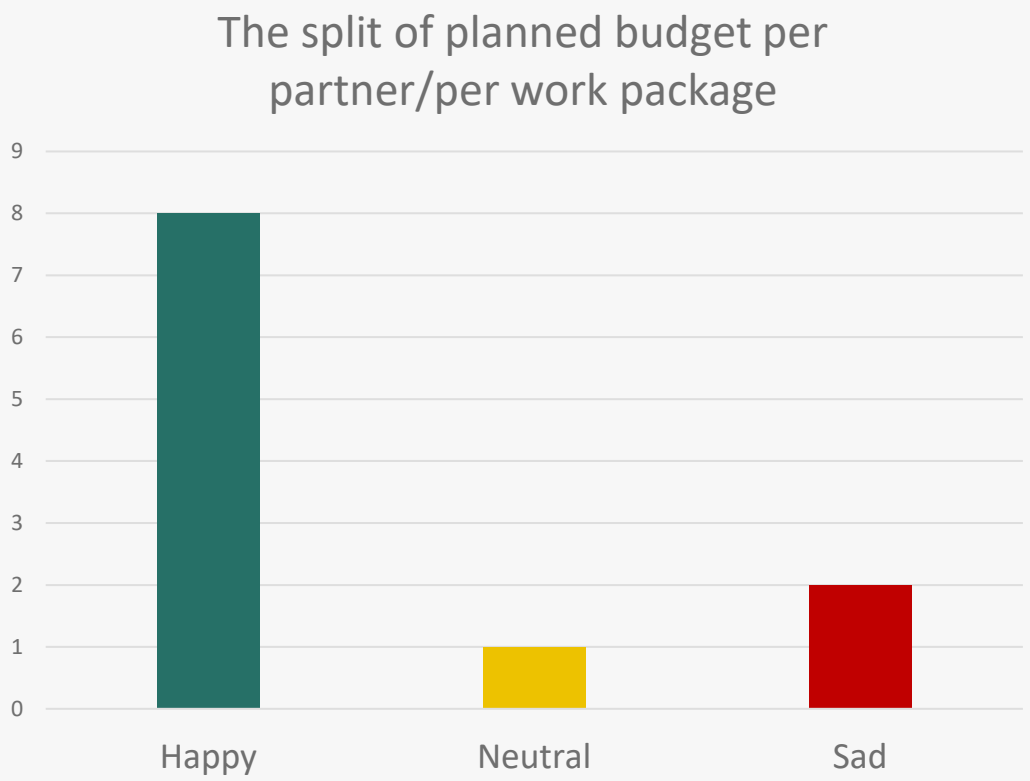
Survey results – Costing proposal

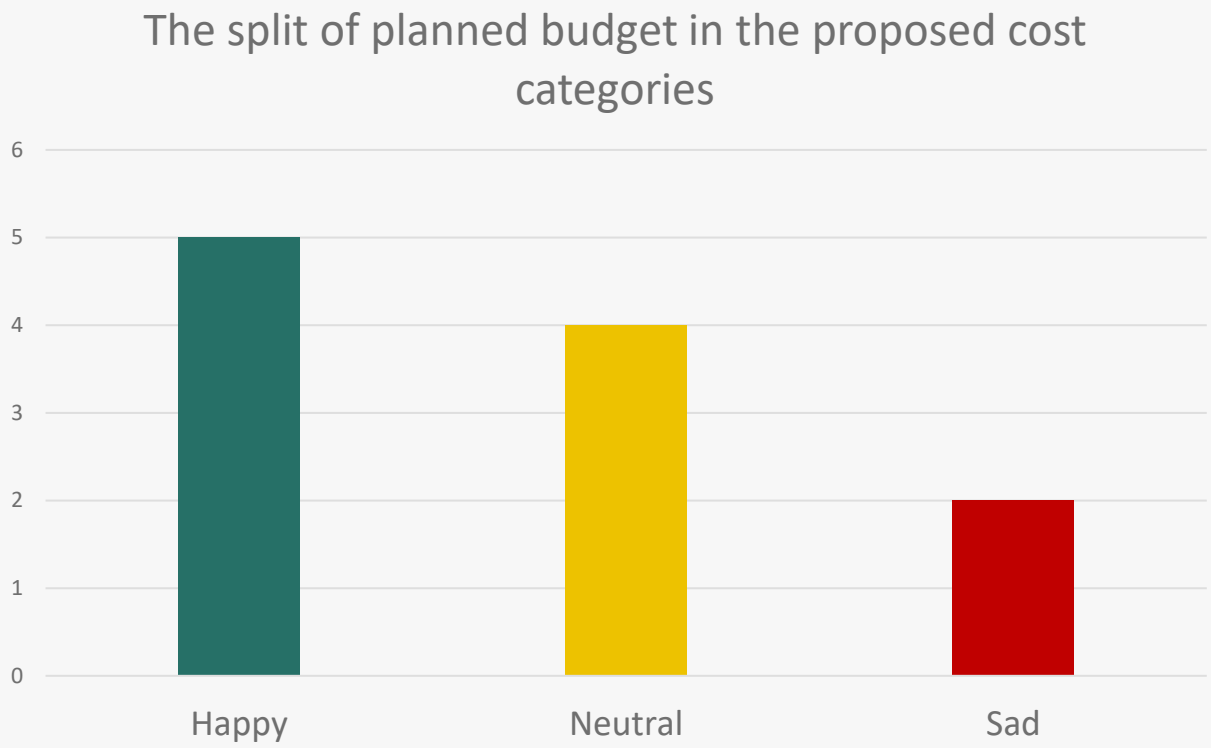
Feedback on Costing

	This is a place holder of the to be developed work plan section (currently C.4 of the HIT application form template)	Based on the feedback provided, more structure for the costing exercise implemented. The proposal to use flat rates for "admin" and "travel & accommodation" was accepted and has been included. Info: The totals of each partner here have to match the totals in the partner budget section. This section is not to be used in cases where the P-BA approach prescribes the budget (=no costing exercise) and the milestones/targets with their values in €.

	Work package description	Budget ~~description~~ for work package						
		Cost categories	PP1 budget in €	PP2	PP3	PP4	PPN	Total in €
1		Staff Costs	1,000	500				1,500
		Office and administrative costs (up to 15% of staff costs)	150	75	-	-	-	225
		Travel & accommodation costs (up to 15 % of staff costs)	150	75	-	-	-	225
		all other direct costs	1,000	500				1,500
		Total in €	2,300	1,150	-	-	-	
	total budget for work package (in €)	3,450						
...	to be repeated as above ("add additional work package" function)							
	total budget (in €)	Sum of all work packages						

Feedback on Costing





Survey results | split partner/budget & cost categories – selection of feedback

- No need to use cost categories at all.
- We would like to have the budget on output breakdown not work package to assess the value of the output.
- We would like to see an additional column where the all the different expenses are detailed per partner (for 3e).
- Split the category "all other direct costs" to different categories, for instance "external expertise", "infrastructure costs".
- It would be better to have the costs of the "investments" as an own category (only merge external expertise and services and equipment).
- It would be simpler if there is no split at WP level but only at PP level.

Survey results | costing on project level – selection of feedback

1. Would you consider it a further simplification for the costing exercise if the planned budget were split in cost categories and project only (no split per partner budget)?

No

- the volume of partner participation and to assess partnership quality.
- Maintain partner-level information for transparency purposes while allowing greater flexibility in the use of budget allocations.
- Useful when there is a partner change in the project.
- Needed for the financial and resource capacity check per partner.
- To verify financial aspects (compliance with public procurement rules and state aid regulations, the absence of double funding, fraud and conflicts of interest).
- In general would be a simplification but much more difficult to assess the budget.



Let’s discuss and try to come to agreements

Agreements (tentative)– costing

- To use the following cost categories:
  1. Staff costs (entry)
  2. Office and administrative costs (flat rate of up to 15% of staff costs) (automatic calculation)
  3. Travel and accommodation costs (flat rate of up to 15% of staff costs) (automatic calculation)
  4. External expertise and services & equipment costs (entry)
  5. Infrastructure and works costs (entry)

  Attention, this is a reversal from the previous decision to merge external expertise and services, equipment and infrastructure and works costs in one budget category (other costs).
- To explore, if the budget can optionally be linked to a work package description OR to output indicators (work package description or output indicator will be the starting point for the costing)

Agreements (tentative)– costing

After 1st HIT meeting

Cost categories
Staff Costs
Office and administrative costs (up to 15% of staff costs)
Travel & accommodation costs (up to 15 % of staff costs)
all other direct costs
Total in €
3,450

After 2nd HIT meeting

Cost categories
Staff Costs
Office and administrative costs (up to 15% of staff costs)
Travel & accommodation costs (up to 15 % of staff costs)
all other direct costs
external expertise & equipment
Infrastructure & works
Total in €
7,004,066.98

Survey results – Milestones and targets

General feedback

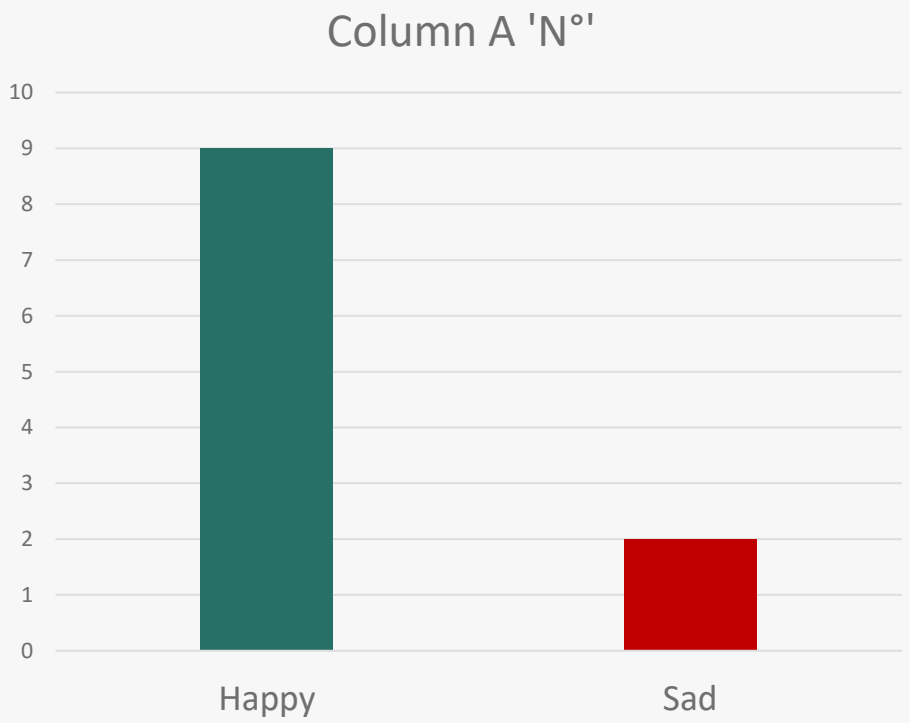
- Single entry as much as possible
- To not forget about formatting (A4)
- Meaningful visualisation of data

Overview tables will be a separate discussion

Feedback on milestones & targets

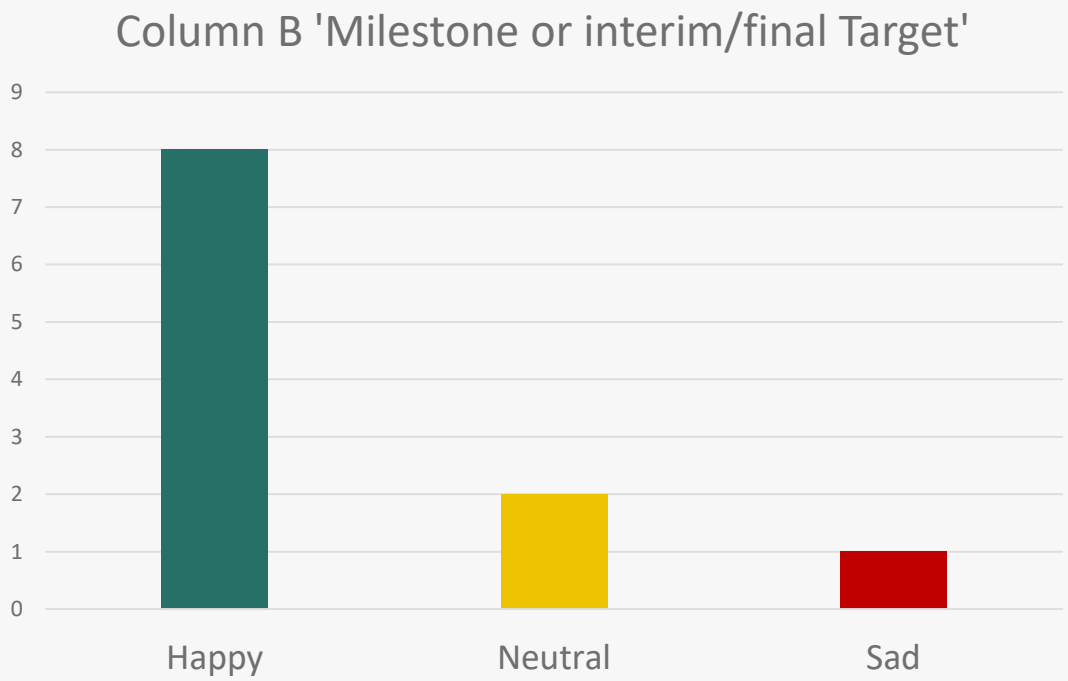
A	B	C	D	NEW	NEW	NEW	E	NEW	F	G	NEW	H
		This section should be designed in a way that programmes can decide what level of liberty projects will have to propose milestones and targets.	If target (project level)						Split between partners needed to allow a) for partner specific reporting and b) for corrections	Cross calculation: a) The total percentages of each partner contributing to each milestone/target must equal the total budget for each partner (partner section in the appplication form) b) The total percentage of all partners has to be 100% of the milestone/target		AGREED
N°	Milestone or interim Target or final Target	Name of milestone or target	Please indicate the number of output indicator(s) to be achieved. If the final target will be achieved in several tranches, select the interim target as many times as needed and accumulate until total number of output indocator(s) (as indicated in section of the application form for the output indicators) is reached.		Please provide an indicative timeline for by when the milestone or interim/final target will be achieved.		Value for milestone or interim/final target as % of total budget	Amount for milestone or interim/final target in I of total budget	Partner(s) involved in delivery of milestone or interim/final target	partner level Split of ~~value for~~ contribution to milestone(s) and interim/final target(s) between partners involved, in % (Total must be 100% of concerned milestone or	partner level Amount of split of contribution to milestone(s) and interim/final target(s) between partners involved, in I (Total must be the total amount of concerned milestone or	Evidence to be provided to prove the milestone or interim/final target was achieved.
			Baseline	Target	Quarter	Year						
automatic numbering Mn - for milestone ITn - for interim Target Tn - for final target	Dropdown: - Milestone - Interim Target - final Target & "add additional" function	Fixed milestones & targets (if pre-decided by programme) OR Dropdown: Either pre-defined milestones and pre-defined targets (programme output indicators) OR free text for milestones and pre-defined targets (programme output indicators)	number field	number field	Dropdown Q1 Q2 Q3 Q4	Dropdown 2028 2029 2030 2031 2032 2033 2034 2035	% of total Budget	automatic calculation	Dropdown & several choices possible: Partner number from **partner section in the application form**	automatic display of partners indicated + number field, e.g. LP1, PP2, PP3 selected, then per partner a field to insert their % of the milestone / target	automatic calculation	Dropdown: pre-defined evidence OR free text field
M1	Milestone	~~(optional)~~ pre-defined e.g Subsidy contract signed			Q1	2029	10%	1,000 I	LP1, PP2, ... PPn	LP1: 10%, PP2: 10% ...PPn: 10% (total 100%)	1,000 I	- signed subsidy contract
IT1	Interim Target	e.g. Number of participation in joint actions across borders	0	25	Q4	2029	20%		LP1, PP2, PP3	LP: 50%, PP2: 30%, PP3: 20% (total 100%)		defined in programme documents)
T1	Final Target		25	50	Q4	2030						
...												
Totals			...	Sum of output indicator I ~~Sum of output indicator II~~			Sum amounts (needs to equal total budget or 100%)	Total budget in I (needs to match), with error message if not		Sum of LP1 Sum of PP2 .. Sum of PPn	Total of each partner in I (needs to match total amount of each partner from partner section), with error message if not	

Feedback on milestones & targets

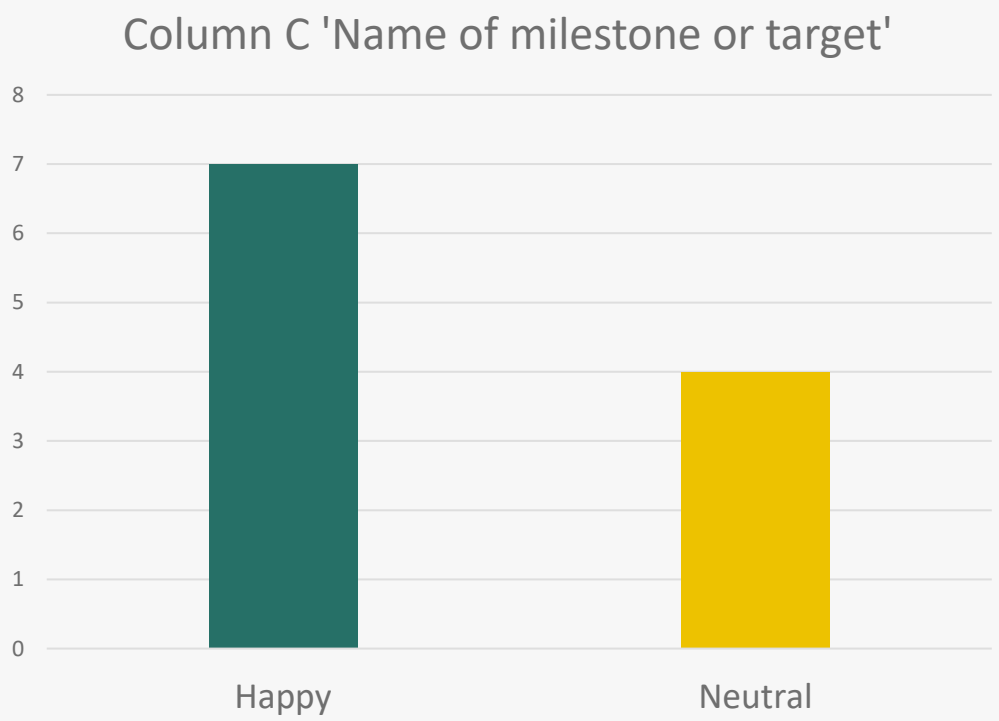


Milestone or interim Target or final Target	Name of milestone or target
Dropdown: *- Milestone* *- interim Target* *- final Target* *& "add additional" function*	*Fixed milestones & targets (if pre-decided by programme)* *OR* *Dropdown:* *Either* *pre-defined milestones and pre-defined targets (programme output indicators)* *OR* *free text for milestones and pre-defined targets (programme output indicators)*
Milestone	~~(optional)~~ pre-defined e.g Subsidy contract signed
Interim Target	e.g. Number of participation in joint actions across borders
Final Target	

Feedback on milestones & targets

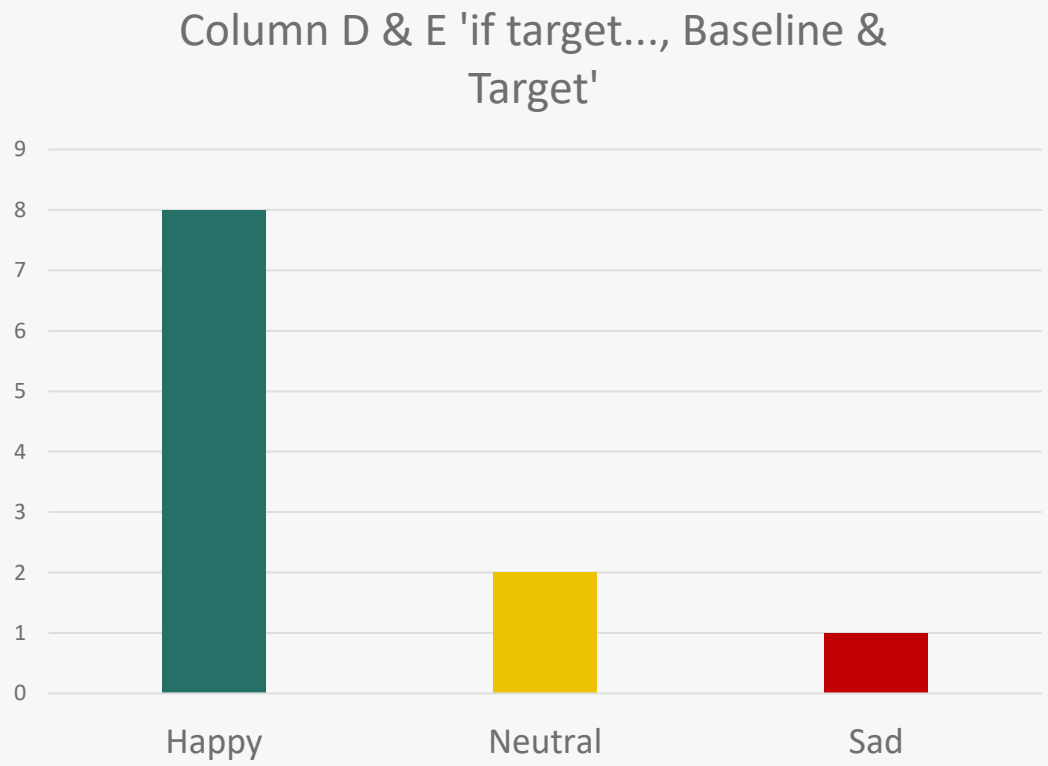


Feedback on milestones & targets



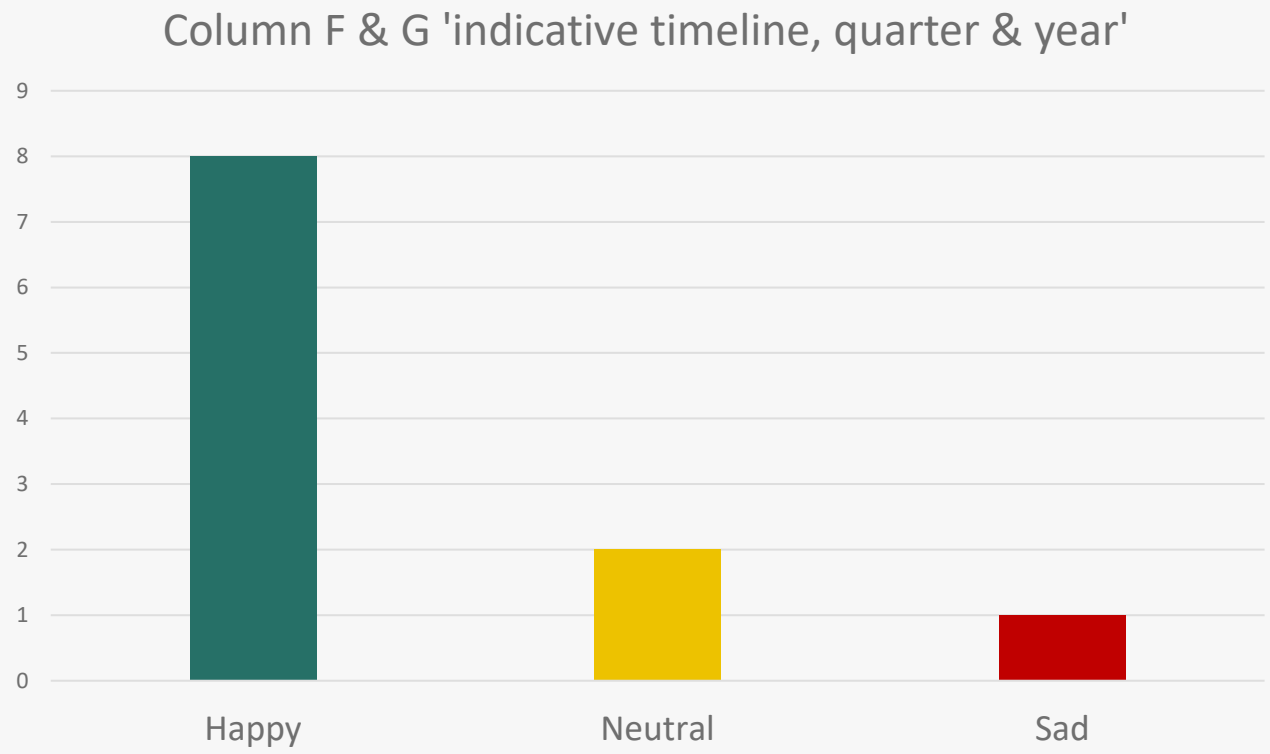
Name of milestone or target	
Fixed milestones & targets (if pre-decided by programme) *OR* *Dropdown:* *Either* *pre-defined milestones and pre-defined targets (programme output indicators)* *OR* *free text for milestones and pre-defined targets (programme output indicators)*	**1** **2** **3**

Feedback on milestones & targets



If target (project level)	
Please indicate the number of output indicator(s) to be achieved. If the final target will be achieved in several tranches, select the interim target as many times as needed and accumulate until total number of output indocator(s) (as indicated in section of the application form for the output indicators) is reached.	
Baseline	**Target**
number field	*number field*
0	25
25	50

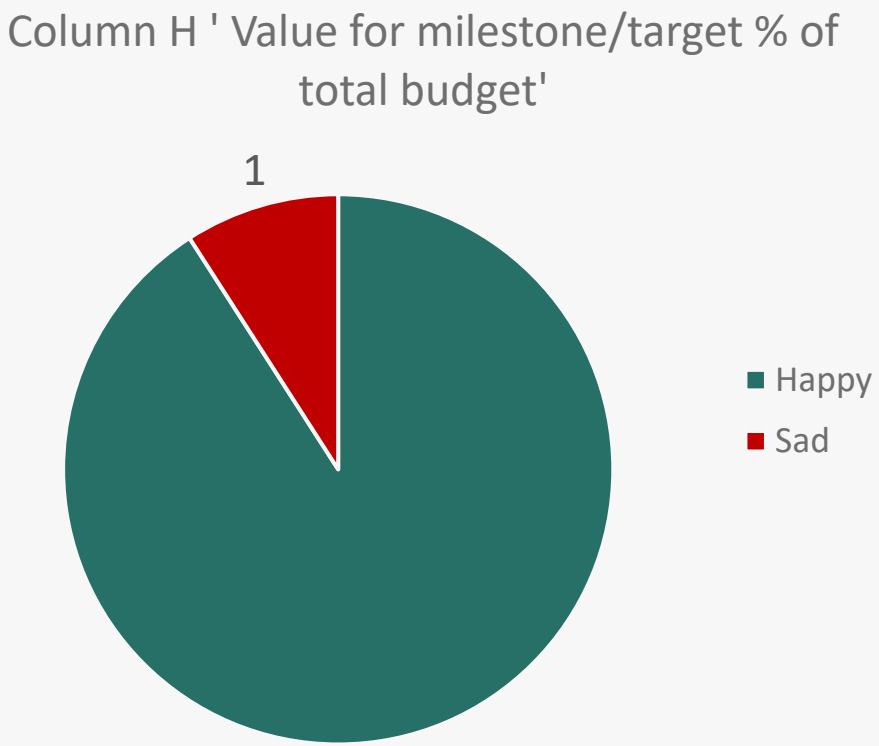
Feedback on milestones & targets



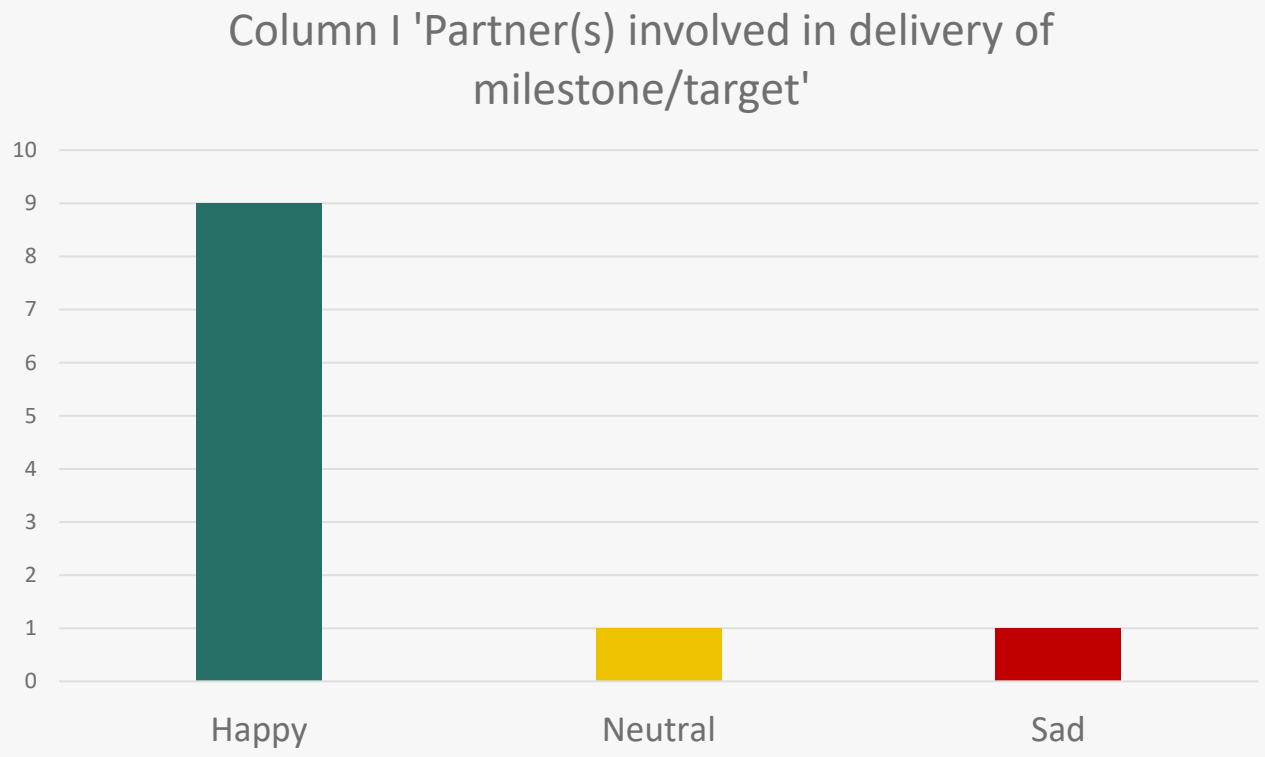
the planned timeline/reporting period

Please provide an indicative timeline for by when the milestone or interim/final target will be achieved.	
Quarter	**Year**
Dropdown *Q1* *Q2* *Q3* *Q4*	*Dropdown* *2028* *2029* *2030* *2031* *2032* *2033* *2034* *2035*
Q1	**2029**
Q4	**2029**
Q4	**2030**

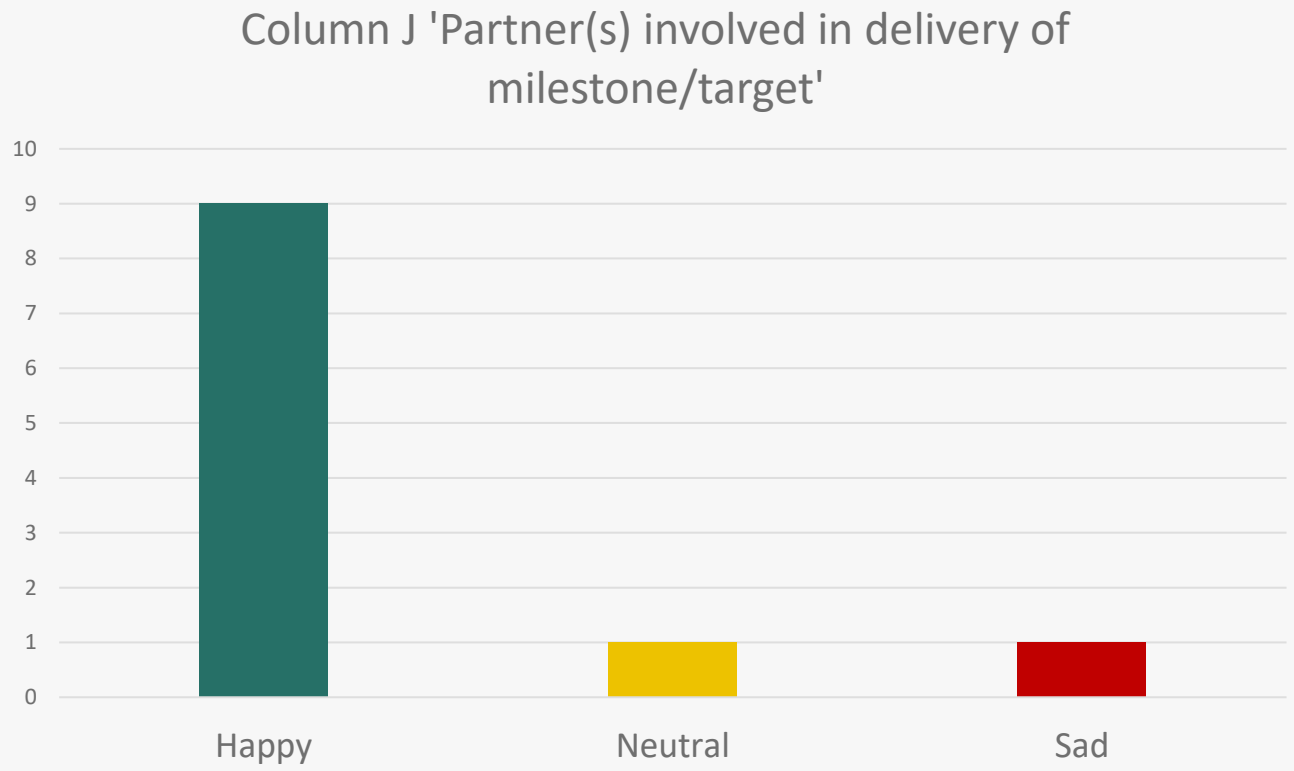
Feedback on milestones & targets



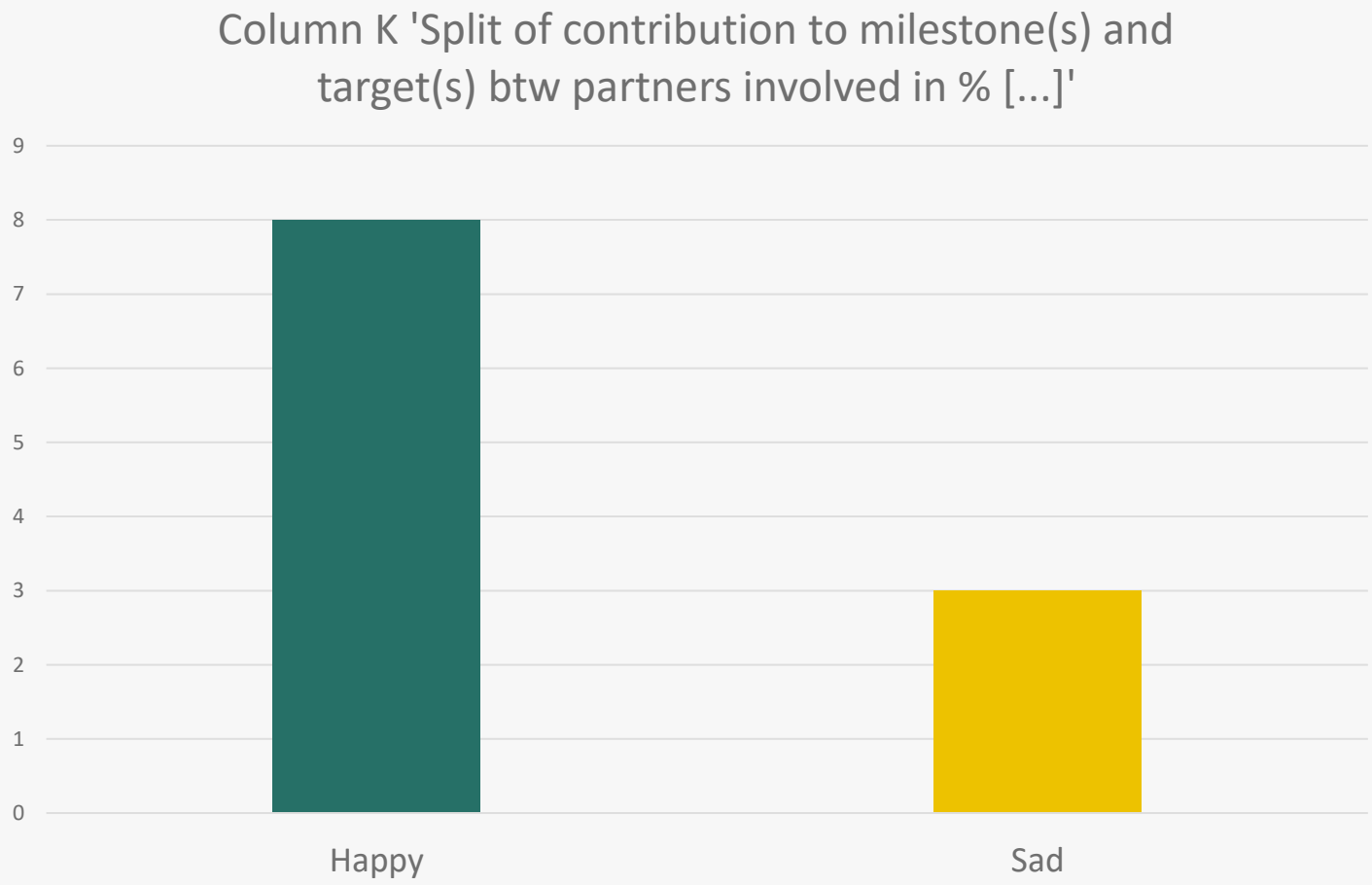
Feedback on milestones & targets



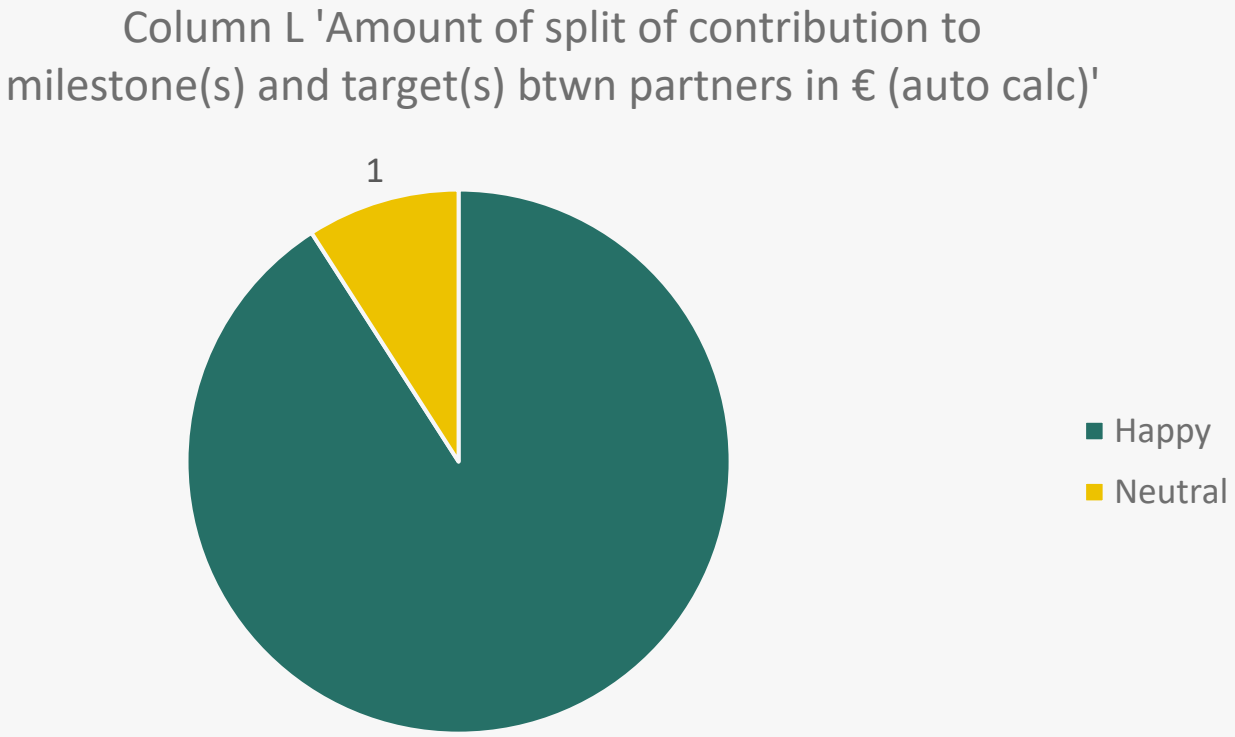
Feedback on milestones & targets



Feedback on milestones & targets



Feedback on milestones & targets





Let’s discuss and try to come to agreements

Agreements (tentative)– milestones & targets

- Improved text for the instruction/information on target values (columns D & E) and indicative timeline (columns F & G).
- Year and quarter to be swapped (columns F & G, planned timeline).
- Partner involvement and specific contribution to milestone(s) and target(s) become optional (columns J-L).
- Cross-calculation for split by partner and contribution in connection with the individual partner budget needs revision, as the current logic applied does not work in practice (columns J-L).

Agreements (tentative)– milestones & targets

After 1st HIT meeting

If target (project level)
Please indicate the number of output indicator(s) to be achieved. If the final target will be achieved in several tranches, select ~~the~~ interim target as many times as needed and accumulate until total number of output indocator(s) (as indicated in section of the application form for the output indicators) is reached.

Please provide an indicative timeline for by when the milestone or interim/final target will be achieved.

Quarter	Year

partner level	partner level	partner level
Partner(s) involved in delivery of milestone or interim/final target	Split of ~~value for~~ contribution to milestone(s) and interim/final target(s) between partners involved, in % (Total must be 100% of concerned milestone or interim/final target)	Amount of split of contribution to milestone(s) and interim/final target(s) between partners involved, in € (Total must be the total amount of concerned milestone or interim/final target (column G))

After 2nd HIT meeting

If target (project level)
Please indicate the target value of output indicator(s) to be achieved. If the final target will be achieved in several tranches, select ~~the~~ interim target as many times as needed and accumulate until total number of output indocator(s) (as indicated in section of the application form for the output indicators) is reached.

Please provide the planned timeline by when the milestone or interim/final target will be achieved.

Year	Quater

F	G	NEW
	Optional	
Split between partners needed to allow a) for partner specific reporting and b) for corrections	Cross calculation: a) The total percentages of each partner contributing to each milestone/target must equal the total budget for each partner (partner section in the apprlication form) b) The total percentage of all partners has to be 100% of the milestone/target	
partner level	partner level	partner level
Partner(s) involved in delivery of milestone or interim/final target	Split of contribution to milestone(s) and interim/final target(s) between partners involved, in % (Total must be 100% of concerned milestone or interim/final target)	Amount of split of contribution to milestone(s) and interim/final target(s) between partners involved, in € (Total must be the total amount of concerned milestone or interim/final target (column G))



Anything that we missed?

Upcoming HIT events

Online	HIT consolidated meeting | 02 December
27-28	stay tuned

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: Intervention Logic, Capitalisation & Synergies, Budget 27.-28.10.2026 Zagreb



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**