Navigating project monitoring: practices, challenges and new perspectives

workshop notes

April, 2026

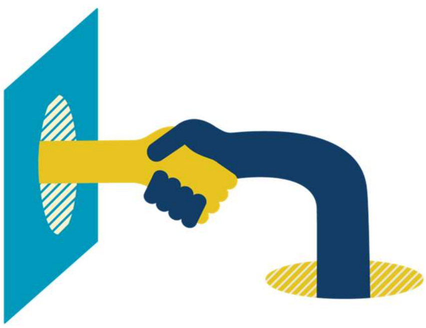
This document summarises the key insights from the workshop ***"Navigating Project Monitoring: Practices, Challenges and New Perspectives"*, held on 17–18 March 2026 in Helsinki**.

The event brought together Interreg programme representatives to exchange experiences on project monitoring approaches, including project changes and flexibility, and to reflect on emerging trends in the project management and their implications in the Interreg project management and monitoring.

The document captures outcomes from interactive sessions, including:

- **Short reflection on new trends in the project management and monitoring**
- **World Café discussions on monitoring** with a focus on project start-up phase (including attending kick-off meeting and project early support and monitoring, risk assessment, and monitoring approaches)
- **Reflection of future of monitoring using KISS methodology** (Keep, Improve, Stop, Start).
- **Categorisation of project changes**, based on feedback collected from programme representatives during the event.

Overall, the document aims to provide an overview of current practices, highlight key trends, and support learning and exchange among programmes.



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New trends in the project management

Participants reflected on **emerging trends in values, ways of working, and tools shaping project management and monitoring**.

Values

The discussion highlighted a clear shift towards:

- **sustainability**
- stronger **focus on impact** rather than outputs
- Greater emphasis on **trust, relationships, and cooperation**.

Participants also noted an evolving role of lead partners, moving from coordination towards a more leadership-oriented approach, with responsibilities increasingly shared across the partnership.

Ways of working

There is a growing **focus on results** and **people-centred solutions**. Hybrid working model is also influencing project implementation and monitoring processes. At the same time, more attention is given to the overall process, alongside **continuous tracking of project progress**. **Stronger cooperation and closer interaction** both within partnerships and within stakeholders, are becoming increasingly important.

Tools and technology

Participants pointed to the **expanding use of digital solutions**, including AI, communication platforms (e.g. Teams, Zoom), and visualisation tools (e.g. Canva, Power BI). AI is increasingly seen as relevant for monitoring and data analysis, which also raises the need for stronger **critical thinking** when interpreting results. At the same time, a balance between digital tools and personal interaction remains important.

The reflections suggest a shift towards more sustainable, collaborative, and data-informed project management and monitoring approaches, supported by digital tools but grounded in human relationships and critical thinking.

A publication on new trends in project management and their potential implications for Interreg is available in the event webpage. It is based on recent project management literature (books and articles), as well as insights from project management communities and events.

World café: smart monitoring in the project start-up phase

The objective of the session was to facilitate exchange among programmes and jointly explore effective strategies for managing monitoring during the project start-up phase, with the aim of ensuring high-quality and sustainable project results.

Discussions were held in three groups, focusing on:

- **support during the kick-off phase**
- **risk assessment**
- **project monitoring**

The outcomes of the World Café discussions are summarised below and are complemented by documents shared by participants related to risk identification in their programmes

Project support during the project kick-off phase

Discussion questions:

- *How does programme support and monitor projects in the first months*
- *Experience with project kick-off meetings*
- *What do you focus most on?*

Project kick-off meetings

- In some programmes, participation of Joint Secretariat staff in project kick-off meetings is mandatory, while in others it is considered a recommended good practice.
- Overall, participants agreed that participation in these meetings is highly valuable for aligning expectations between programmes and projects, identifying potential risks at an early stage, and enabling more targeted support and effective monitoring throughout implementation.
- Typically, key topics such as reporting, communication, and programme rules are covered.
- In some programmes, the so called kick off meeting can be arranged also in a different context. For example in Germany-Denmark programme the MA is responsible for checking the documents regarding disbursements, especially employment contracts (no first level-controllers). The lead and the project partners have to participate in a specific kick-off event, where details are explained, e.g. regarding the employment documents and supplements. Whenever possible, the JS participates in these meetings.
- If the JS contact person does not attend the meeting, programme requires the project to submit a meeting summary or minutes to the JS. *(Euro-MED).*

Meeting with lead partner (Euro-MED, Lithuania-Poland)

In some programmes, dedicated meetings are organised with lead partners prior to signing the Subsidy Contract. These meetings are used to:

- to discuss conditions fulfilment and or updates of the Application Form before signing Subsidy contract
- to identify and address project risks.

Lead partner seminars

- Many programmes organise Lead Partner seminars or similar onboarding events for approved projects. The format varies: some online, mostly in person, or combination of online before the in person event.
- **Participation** mostly limited to lead partners, but sometimes whole partnership, or several participants from partnership are invited.
- **Topics covered**: reporting, financial management, communication and programme expectations. Some programmes devote also dedicated time for capitalisation, building synergies and networking among the projects.

Meetings for new projects from the call (all partners welcomed): Lithuania-Poland, Germany-Denmark, Estonia-Latvia.

Trainings for project partners Poland-Ukraine programme has trainings at the very beginning of the project, for example, SCOs in accounting system of project partners.

Early monitoring and support are important in all participating programmes. It's structured around start up meetings and either in-person or online (Lead Partner) seminars, that in many cases are open to all partners. Programmes concluded that support starts already during the application phase with consultations.

Risk assessment

Discussion questions:

Do you assess risks during the project start-up phase?

Do you have a formal approach to risks assessment?

If you don't have formal risk assessment approach, what are your key "red flags" in project monitoring?

Guidance on risk management and monitoring in projects is rarely provided explicitly in programme guidance or programme websites. However, some programmes have developed **formal procedures and tools**, **including checklists**, to support risk assessment.

- **IPA Croatia-Bosnia and Herzegovina-Montenegro**: **a risk assessment tool** developed by the Managing Authority **to support the planning of project monitoring visits**. The Joint Secretariat fills in the template, which forms the basis for the annual monitoring plan (attachment available).
  - The first part of the tool (columns A–H) is completed during the project optimisation phase to identify early risks.
  - The second part (columns I–Q) is updated during implementation to reflect changes in risk levels (e.g. at the start of the second reporting period or earlier if needed).
  - Based on the assessed risks, the timing and frequency of monitoring activities are adjusted. All projects are visited at least once, while higher-risk projects are prioritised for earlier and more frequent monitoring (combining online meetings and on-site visits).
- **Bulgaria–Turkey**: A formal risk assessment is carried out every three months using a traffic light system. The results are shared with the Managing Authority (MA) and National Authority (NA), and monitoring visits are defined accordingly (attachment available).
- **EURO-MED**: The **Programme Manual foresees that the Joint Secretariat assesses project performance risks based on predefined risk factors** (see Programme Manual, pp. 90–91). In addition, a **dashboard supports automatic identification of risk factors for project officers**. When risks are identified, ad hoc meetings with projects may be organised.
- **Interreg Central Europe**: risk assessment is framed as **performance assessment**. After each monitoring step, projects are categorised as excellent/very good, moderate, or low-performing.

Some programmes do not have formal risk assessment procedures or documents, but risk identification is still embedded in programme practice. Programme officers rely on their experience and ongoing communication with projects to identify risks and adjust monitoring and support.

Key observations and practices

Early risk identification is critical. Important opportunities arise during:

- **project assessment**, when proposals are thoroughly analysed, they could be assessed from a risk perspective as well. For example, NEXT Poland-Ukraine programme has relatedquestions in the assessment grid: Are there any risks for the indicators achievement, and if so, are these properly described? Are there any risks defined in the application which can lead to possible delays?
- **conditions fulfilment (clarification) phase**, opportunity to refine the application and address identified risks with relatively limited administrative burden, before full implementation starts.
- **kick-off meetings or early meetings with lead partners/partnership**, where a deeper understanding of the project, partnership dynamics can be observed, expectations clarified, potential weaknesses and risks identified and support and monitoring approach accordingly adjusted.

Newcomers to Interreg are often considered higher-risk due to limited experience. At the same time, they may follow guidance more closely, while experienced partners may rely on past practices despite changes between programming periods. At the same time it has to be noted that risk is linked not only to the new organisations, but also to individuals in even experienced organisations and their capacity to manage projects.

Certain risk criteria are context-dependent. For example:

- a partnership of 10 organisations may be considered large and risky in cross-border programme, but typical in transnational programmes
- similar differences apply to project size, budget, and infrastructure components.

Historical knowledge about applicants and partners from previous projects is an important source for risk assessment. However, this knowledge is often informal and concentrated among experienced staff, making it difficult to transfer to new colleagues. There is a clear need to formalise such knowledge and document key risk factors at programme level.

Risk assessment should not be seen only as a control, but as a tool to provide **targeted support**:

- tailored support, including trainings
- intensified support for projects facing implementation challenges (e.g. “intensive care” approache).

It is important to encourage **projects to carry out their own risk assessments** and discuss risks openly during meetings.

Risk assessment can be framed positively, for example as **project success assessment**, to avoid a purely negative perception. In all cases, trust in projects and their intentions remains essential.

Monitoring practices

Discussion questions:

- *What is your programme monitoring approach?*
- *What works well?*
- *What are the challenges?*

Diversity in monitoring and reporting cycles

Programmes have established various reporting intervals and methodologies to balance oversight with efficiency:

- **3-Month cycles:** IPA Bulgaria-Türkiye, while PEACE+ with **"**decoupled reporting".
- **4-Month cycles:** Romania-Bulgaria and Estonia-Latvia.
- **6-Month and disentangled cycles:** Germany-Denmark, South Baltic, France-Belgium, Interreg Europe, Danube Region and IPA ADRION.
- **Interreg CENTRAL EUROPE** has introduced **"Disentangled periodic reporting"** where Joint Finance Reports (JFR) are submitted every 6 months, but Joint Activity Reports (JAR) are only required annually.

Continuous monitoring, monitoring plan and strategic reviews

Some programmes are moving toward a continuous flow of information rather than relying solely on periodic reports:

- **Continuous feedback: CENTRAL EUROPE** emphasizes the immediate upload of deliverables and outputs into Jems, allowing for direct feedback and verification of **"monitoring milestones"** or control points. The objective is to reduce the administrative burden and have stronger focus on results. In addition, a **monitoring plan** is jointly developed by partnership and Joint Secretariat. It defines the key targets and outputs to be monitored, rather than covering all deliverables. It serves as a management tool both for the programme and project, and is a pre-condition for reimbursements.

Structured reviews:

- CENTRAL EUROPE uses a collaborative **"fitness check"** (usually once per project).
- Danube Region performs a **"1st year review"** to compare delivered outputs against the planned ones in the pipeline.
- **Mid-term reviews** are scheduled at **Q4** for Interreg Europe and at **18 months** for IPA ADRION.

Site visit strategies and good practices

Programmes vary in their approach to on site visits, often choosing **between full coverage (at least one visit per project during the project lifecycle) and risk-based triggers**:

- Germany-Denmark and Estonia-Latvia aim for on-spot **visits for all projects**. PEACE+ typically conducts one site visit per project, increasing to two for the project that might have any GDPR-related aspects.
- Danube Region and Estonia-Latvia **trigger on-the-spot checks specifically when "issues" or problems are detected**.

- IPA Bulgaria-Türkiye conducts initial online monitoring visits within the first three months for both Lead (LP) and Project Partners (PP). Germany-Denmark and Estonia-Latvia focus on **kick-off meetings** and seminars to set expectations early.
- Romania - Bulgaria highlights that close **cooperation between project partners and National Controllers** builds essential trust. IPA ADRION involves National Contact Points (NCP) directly in monitoring visits to support beneficiaries.

Addressing challenges and operational efficiency

The transition to these new models, such as mid-terms reviews or continuous monitoring is driven by the need to solve common implementation challenges:

- **Reducing burden:** The shift in Interreg CE is specifically designed to reduce administrative burdens for both project partners and the Joint Secretariat and provide **quicker reimbursement** (from 90 days in 2014-2020 to 23 days in 2021-2027 period).
- **Financial flexibility:** Romania-Bulgaria uses **"partial reporting"** to enhance beneficiary cash flow, requesting refunds for amounts exceeding 100 000 EUR.
- **Quality insurance:** IPA ADRION implements a **"4 eyes principle"** for monitoring, while Danube Region requires specific **"Quality reports"** for project outputs.

Key insights from KISS reflection on monitoring

At the end of the event, participants were invited to reflect on their current monitoring practices using a KISS approach – identifying what works well and should be maintained, what should be improved, what should be stopped, and what new practices could be introduced. This reflection aimed to capture reflections from participants on current approaches and support learning both for the current programming period and in preparation for the next one.

The summary below presents the key points gathered during the session. Items are listed in order of frequency: the first points reflect those most commonly mentioned by participants, followed by those raised several times, while the final items represent individual inputs that were mentioned less frequently.

KEEP:

- Flexibility for projects and the ability to think outside the box, including flexibility related to project changes (most frequently mentioned)
- Simplified Cost Options (SCOs)
- Interact as a platform for exchange between programmes, sharing successes and challenges
- Focus on results
- Partial/continuous reporting
- Jems
- Monitoring plans
- Good communication and trust, including on-the-spot and online visits, and participation in
- Participation in kick-off meetings
- Empathy towards beneficiaries

STOP:

- Excessive administrative burden, bureaucracy, and overcontrolling of projects (most frequently mentioned)
- Fragmentation of reporting systems and significant differences between programme approaches
- Overly complex indicator definitions and monitoring based on extensive documentation (e.g. participant lists)
- Frequent reporting; consider moving to longer reporting periods
- Reinventing the wheel

IMPROVE:

- Flexibility for projects and programmes, including budget modifications (most frequently mentioned)
- Digitalisation and further automation of processes
- Monitoring processes and their overall efficiency
- Risk-based analysis and targeted support

- Shared understanding between programmes and projects on key outputs and result indicators, including better management of participant-related indicators
- Project support systems, including closer monitoring of high-risk projects (“red flags”)
- More dynamic flow of information between projects and programmes, including in person meeting, participation in kick-off meetings and having online meeting and visits to save time
- Transfer of relevant information from the assessment phase into monitoring, including project adjustments before contracting
- Timing of reporting: introduce more continuous approaches and separate financial and activity reporting where relevant
- Early communication of issues, supported by trust
- Harmonisation (e.g. common databases, templates, and approaches across programmes)
- Simplification of procedures
- Clear rules established from the beginning of projects
- Earlier definition and implementation of monitoring and verification processes
- Review of administrative processes imposed by programmes or regulations

START NEW

- Creating programme structures that allow greater flexibility (most frequently mentioned)
- Using digital and automated tools to better monitor and support projects
- Greater alignment across programmes (e.g. application and monitoring documents)
- Stronger focus on results and main outputs rather than all deliverables
- Seeing people behind projects, not only project titles and numbers
- Early risk detection and targeted support for projects in need
- A monitoring perspective not centred solely on financial aspects
- Simplified procedures for project changes
- Introducing activity reports for uploading deliverables and outputs over longer periods (e.g. 6 months)
- Involving beneficiaries in monitoring discussions and reflection processes

Summary of the KISS reflection

Participants’ reflections revealed a consistent set of priorities across Interreg programmes, highlighting both strengths and areas for further development in monitoring practices. **Flexibility** and **focus on results** were widely appreciated and seen as essential elements **to maintain**. At the same time, these same aspects – particularly **flexibility** – were also identified as areas needing further **strengthening** and more structured support.

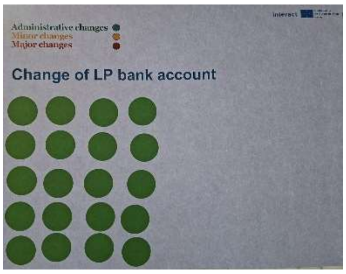
A clear and recurring message was the **need to reduce administrative burden and simplify processes**, which are still perceived as too complex and resource-intensive. Participants also emphasised the importance of **aligning approaches across programmes**, as current fragmentation and differing practices create challenges for both programmes and beneficiaries.

There was strong support for moving towards more **risk-based, targeted monitoring and making better use of digital tools to improve efficiency**. Overall, the discussion points to a shift towards more flexible, aligned, and value-oriented monitoring systems that better support projects in delivering meaningful results.

Project changes: dotting exercise

The following summary presents how different Interreg programmes categorise project changes, based on feedback collected from programme representatives during the event. The distinction between administrative, minor, and major changes reflects the varying levels of flexibility, procedural requirements, and reporting obligations applied across programmes in the 2021–2027 programming period. It further captures key aspects of these modifications, including the type and scope of the change, the programme bodies involved in their assessment, validation, and decision-making, as well as the timing and eligibility of such changes throughout the project implementation lifecycle

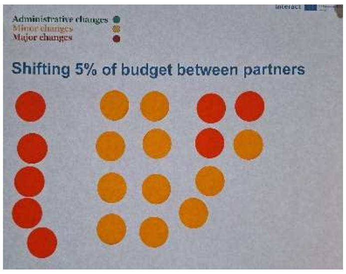
Change of lead partner bank account:



WHAT: There was full consensus among participants that this constitutes an administrative change. As it does not affect project activities, outputs, or budget allocations, it is treated as a routine update of project-related financial and contact information.
WHO: Responsibility lies primarily with the lead partner, typically requiring only notification to or validation by the Joint Secretariat.

WHEN: This change can be implemented at any point during project implementation, as needed.

Shifting 5% of budget between partners:



WHAT: This scenario revealed a lack of full alignment among programmes. While many programme representatives classify this as a minor change, others consider it a major modification, depending on programme-specific thresholds and applicable rules.
WHO: The process generally requires coordination between the lead partner and the Joint Secretariat, and in several cases also involves the Managing Authority, to ensure compliance with programme provisions on budget flexibility and reallocations.

WHEN: In most programmes, such changes are permitted throughout the implementation period, subject to defined flexibility thresholds. However, timing considerations are important. Several participants highlighted that reallocations should be avoided in the final phase of the project, typically within the last 3 to 6 months, or should be completed before submission of the final report.

Legal succession

WHAT: Consistently classified as a major change, as it entails a modification of the project partnership with significant legal, administrative, and operational implications.
WHO: The process involves multiple programme bodies, including the Joint Secretariat, Managing Authority, and often the Monitoring Committee (MC), reflecting the strategic and legal importance of such modifications. Sometimes, National Authorities are be involved.
WHEN Although it may be when necessary, legal succession typically requires formal approval by Monitoring Committee. Its feasibility becomes more limited towards the end of the project, with several participants indicating that it should not take place within the final six months, due to procedural requirements linked to the Subsidy Contract and Partnership Agreement.

Moving a stakeholder workshop from month 12 to month 15:

WHAT: Views among programme representatives were divided between classifying this as an administrative or minor change. This reflects different levels of flexibility in the implementation of the work plan across programmes. While some allow such adjustments without formal procedures, others require notification or formal acknowledgement. **WHO:** Generally managed at lead partner level, with limited involvement from the Joint Secretariat, mainly for information or validation purposes.

WHEN: It is typically allowed at any stage of implementation. Some programmes require prior notification within a defined timeframe, for example 30 days in advance, or expect the change to be duly reported in the relevant progress report.

Reducing a target for a pilot solution indicator:

WHAT: This was clearly identified as a major change. Reducing output or result indicators directly affects the project's performance and the commitments made in the approved application form.
WHO: The feedback indicates a heavy involvement of the Joint Secretariat, Managing Authority and often the Monitoring Committee. This underscores that changes to performance indicators are subject to much stricter monitoring and formal approval processes than administrative or minor shifts.

WHEN: Modifying performance indicators can be considered the most time-sensitive change. Participants suggested these adjustments should happen during negotiations, contracting, or the early/mid-term stages of the project implementation. Most agree that such a reduction must be finalised at least 3 months before the project ends to maintain the strategic integrity of the project's contribution to programme objectives.