

## **Annotated template for Strategic Report (updated February 2023)**

### **EEA and Norwegian Financial Mechanism**

#### **Instructions**

This annotated template is a guide for the National Focal Points to produce concise reports – providing assessments rather than descriptions. The report must not exceed 20 pages (excluding annexes). It must reflect the latest data and information available, up to one month prior to submission.

#### **1. Executive summary (max 400 words)**

Provide a summary of the report. Please write this section after you have written the rest of the report, and focus on:

- Summarizing the biggest achievements and challenges in the reporting period (including status and key risks of programmes and the bilateral funds);
- If relevant, any changes in the management and implementation of the Grants;
- If relevant, provide additional information, e.g. information requested by the Donors at the previous Annual Meeting;
- If relevant, raise key issues that you would like to discuss at the next Annual Meeting.

#### **2. Country developments and effects of the Grants (max 600 words)**

- Mention the significant political, economic, and social developments in the Beneficiary State that had an impact on the implementation of the Financial Mechanisms in the reporting period.
- Highlight the overall effects of the Grants in this context, considering:
  - Progress towards reducing social and economic disparities;
  - Progress towards strengthening bilateral relations with donor state entities.

#### **3. Status of programmes (max 400 words per programme).**

Provide a general assessment of the status of programmes that the Beneficiary State is responsible for.

Provide a summary of the status of each programme. Include information on:

- Implementation progress (delays, deviations, reallocations, and major risks);
- How are the MoU special concerns and/or conditions being addressed/implemented;
- Outline the status of the bilateral funds in each programme.

#### **4. Status of bilateral funds in the Joint Committee for Bilateral Funds (JCBF) (max 800 words)**

Give an update on the status of bilateral funds in the JCBF, including:

- A summary of the implementation of the work plan for the bilateral funds and the main activities planned in the coming 12 months, notably pre-defined initiatives and Calls;
- Information on additional allocation of bilateral funds to programmes further to Expressions of Interest;
- An assessment of the cooperation in the Committee.

## 5. Management and implementation (max 800 words)

### a. Management and control systems (MCS)

Provide a summary of any changes concerning the national level MCS. Are there any significant changes in the setup and/or structure or staffing of the national authorities involved in the implementation of the EEA and Norway Grants? A detailed overview of staffing is to be provided in the Annexes. **[If no changes, please explicitly state so]**

### b. Complaints

Provide a summary of the complaints received by the National Focal Point and how they have been dealt with. **[If no complaints, please explicitly state so]**

### c. Irregularities

If irregularities have been detected, provide an analysis of any trends in the irregularities and how they have been dealt with. **[If no irregularities, please explicitly state so]**

### d. Audit

Give a summary of the findings of audits undertaken by the national audit authorities or that have been initiated by the FMO. Please briefly mention audit recommendations and/or required actions, and the plans to follow up on these **[If no audits have been carried out, please explicitly state so]**.

## 6. Monitoring and Evaluation (max 800 words)

### a. Monitoring

Describe the monitoring activities carried out since the previous strategic report, referring to specific projects (not including monitoring commissioned by the FMO).

### b. Evaluation

Summarise any programme evaluations carried out since the previous strategic report (not including monitoring or audits).

## Annexes (Not published)

### A. Risk assessment and management plan.

Please fill in this table:

<b>Programme name</b> (one row per programme managed by the BS authorities)	<b>Overall level of programme risk</b> (on a scale 1-4, where 1 is very low and 4 is very high)	<b>Risk description</b> (Key risks to the programme from the point of view of the NFP)	<b>Actual Response</b> undertaken by the NFP in the last 12 months	<b>Planned response in the next 12 months</b>
<b>Programme 1</b>				
<b>Programme 2</b>				

### B. Evaluation plan

Please upload the evaluation plan using the mandatory evaluation plan template in the Results Guideline.

### **C. Cooperation with Donor Programme Partners and/or International Partner Organisations.**

Provide a short assessment of the cooperation between the Programme Operators, Donor Programme Partners and/or International Partner Organizations, outlining the successes and challenges faced over the last 12 months. [If no changes occurred, please explicitly state so]

### **D. Technical assistance report.**

Please account for the use of technical assistance funds, using the following headlines:

#### **Overview of main activities**

Give a summary of the main activities carried out by each of the national-level institutions involved in the implementation of the EEA and/or Norway Grants 2014-2021: the National Focal Point, the Certifying Authority, the Audit Authority, and the Irregularity Authority. Any challenges and how they are being addressed should be noted.

#### **Budget overview**

Provide information on:

- The implementation of the previous year's Technical Assistance budget (actual expenditure vs. planned expenditure);
- Disbursed and incurred rate to date; and
- If substantial changes are foreseen to the planned expenditure for the coming year or concerning the overall budget, then please provide a brief explanation.

#### **Procurement**

Describe any procurements that have been carried out where activities have been outsourced by national-level institutions. This includes the value of the procurement and the name of the provider (for amounts that exceed the national thresholds for the procurement).

#### **Staffing**

List the staff involved in the implementation of the Grants, providing their names, official position, their principal responsibilities in respect of the Grants, as well as the estimated percentage of their level of effort related to the Grants. The overview should allow the Donors to understand the resources available to implement the Grants in the various national-level institutions. The lists should include individuals important to the implementation of the Grants, even if they are not financed through the Technical Assistance Agreement.

<b>National Focal Point</b>				
Name of staff	Official position	Main tasks	% of working time	Funded through the grants (Y/N)
<b>Certifying Authority</b>				

Name of staff	Official position	Main tasks	% of working time	Funded through the grants (Y/N)
<b>Name of Audit Authority</b>				
Name of staff	Official position	Main tasks	% of working time	Funded through the grants (Y/N)
<b>Irregularities Authority</b>				
Name of staff	Official position	Main tasks	% of working time	Funded through the grants (Y/N)

## E. Communication

### Best projects

Please choose one or two projects as best practice examples that can be used for communication purposes by the Donors and the FMO. Preferably choose at least one project with a Donor State partner. Please include:

- The project ID from GrACE;
- A short description of why you think this is a good project and how it contributes to the objectives of the Grants.

### Visibility of the Grants and the Donors

Please describe the communication activities (both offline and online) undertaken by the National Focal Point to increase the visibility of the Donors and the Grants.

Please share the number of project stories published on your website/webpage in the reporting year.

### Media coverage

Please add links to examples of local, regional, or national media coverage of the EEA and Norway Grants in the reporting period.

### Website and social media

Please fill in the blue cells:

Link to the National Focal Point's (EEA and Norway Grants) webpage	Total number of page views in the reporting year

	Applicable	Link or account handle	Number of posts published in the reporting year	Number of followers
Facebook	[dropdown yes/no]			

<b>Twitter</b>	[dropdown yes/no]			
<b>Instagram</b>	[dropdown yes/no]			
<b>LinkedIn</b>	[dropdown yes/no]			
<b>Snapchat</b>	[dropdown yes/no]			
<b>Tiktok</b>	[dropdown yes/no]			
<b>Other</b>	[dropdown yes/no]			

## Visuals

Please add links to interesting programme and/or project-related multimedia assets in EEA and Norway Grants media library ([eealibrary.org](http://eealibrary.org)) that can be used for communication purposes by the Donors and the FMO. If you have not done so already, please add the assets to the media library on [eealibrary.org](http://eealibrary.org) before adding a link.