

# **Beneficiary state reporting and monitoring guidelines**

**The EEA Financial Mechanism  
&  
The Norwegian Financial Mechanism  
2004-2009**

**The EEA Financial Mechanism & The Norwegian Financial Mechanism  
2004-2009**

Beneficiary state reporting and monitoring guidelines

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### **1. Introduction**

Articles 5.1, 5.2 and 7.1 of the Rules and Procedures for the implementation of the EEA Financial Mechanism and the Rules and Procedures for the implementation of the Norwegian Financial Mechanism, refer to guidelines on reporting and monitoring.

Under Article 1.4 of the Rules and Procedures for the implementation of the EEA Financial Mechanism and the Rules and Procedures for the implementation of the Norwegian Financial Mechanism and Article 4.6 of the Memoranda of Understanding on the EEA Financial Mechanism and on the Norwegian Financial Mechanism, the Focal Points are responsible for monitoring and reporting.

This guideline is intended to give a general overview of monitoring and reporting. The activities related to the external monitoring carried out by the Financial Mechanism Office (FMO) are not subject of this document.

These guidelines are part of a package of guidelines and must be read in conjunction with the other guidelines.

### **2. Reporting at promoter (applicant) level to the Focal Point**

The reporting and monitoring systems established in the beneficiary states should allow the Focal Point to monitor the progress of projects, provide the basis for Paying Authorities for making the disbursement requests to the FMO, provide the basis for Focal Points' reporting to the FMO both on project and on beneficiary state level as well as facilitate the work of national control authorities. As the reporting at promoter (applicant) level to the Focal Point forms the basis for the Focal Point's reporting to the FMO, it is important that the reporting at promoter (applicant) level is done in accordance with the guidelines given by the FMO.

#### **2.1 Project interim report**

The project interim report prepared by the promoter will serve as a basis for the Paying Authorities' disbursement requests<sup>1</sup> to the FMO and will be used for the Focal Point's monitoring of the project progress.

A model for the project interim report is provided in Annex I. A project interim report from the promoters to the Focal Points consists of, among other things, a payment claim

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<sup>1</sup> For further information on disbursements, see Disbursement Guidelines

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section and a project progress section. The project interim report should cover a period of at least three calendar months. The payment claim section comprises summary eligible expenses for activities for individual projects, programmes and block grants respectively.

As for project progress, the project interim report must include information on financial and physical progress. The report must compare actual expenses with planned expenses and the actual progress with planned progress in accordance with the project implementation plan. Any deviations from the original implementation plan must be described and duly justified.

The interim report must include information on the progress towards quantified targets for Results indicators of the project. In addition, the report must include confirmation on the co-financing.

The project progress section of the report is verified by the Focal Point. The Focal Point forwards the report to the Paying Authority, which verifies the payment claim section and gives the co-financing statement.

## **2.2 Annual progress report**

The annual project progress report prepared by the promoter provides the basis for the Focal Point's annual reporting on projects to the FMO.

The annual progress report is *not* linked to payments. The annual progress report covers a period of 12 months. The first reporting period starts from the commitment date. The Focal Points should receive the annual progress reports no later than one month after the reporting period has elapsed.

A model for annual progress report is provided in Annex II. The annual progress report must include summary data on financial progress for the reporting year as well as cumulative data to date. The report must compare the actual expenses with the planned expenses and the actual progress with the planned progress in accordance with the project implementation plan. As for any deviations between the planned progress and the actual progress, the report must describe the deviations' possible repercussions for the project, analyse the reasons for the deviations and propose an action plan how to deal with the deviations.

The annual progress report must include information on the progress towards targets for indicators for Results and Purpose<sup>2</sup> and cover the cross-cutting issues relevant to the project. The report must also address risks and risk management, in particular whether or not the assumptions made are likely to hold true, what new risks might be emerging, and what actions have been taken/are planned to manage or mitigate these risks.

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<sup>2</sup> When applicable

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### **2.3 Project completion report**

The Focal Point shall provide the FMO with a project completion report. The final disbursement is made based on the project completion report and the final project interim report. Accordingly, the project completion report and the final project interim report by the promoter should serve as a basis for the Focal Point's project completion report to the FMO and for the Paying Authorities' disbursement requests to the FMO.

In order for the Focal Point to be able to provide the FMO with a project completion report, the Focal Point should require information from the promoter in line with the model project completion report in Annex III.

The project completion report must document that the project has been completed according to the specific criteria on the basis of which it was approved for grant assistance, as set out in the grant offer letter and in the grant agreement (including the project implementation plan annexed to the grant agreement). In the final project interim report, the promoter determines the final expenses for the completed project. The completion report shall document and comment on overall achievement against the original plan, including the achievement of the targets set for indicators on results, purpose and overall objective, on the cross-cutting issues, prospects for the sustainability of benefits, highlight lessons learned and make recommendations on any follow-up actions that might be needed.

## **3. Reporting by the Focal Point to the FMO**

### **3.1 Project interim reports, annual progress report, project completion report**

The FMO receives the project interim reports in conjunction with the Paying Authorities' disbursement requests.

The annual progress reports will be forwarded by the Focal Point to the FMO within two months after the project reporting period has elapsed.

As for the project completion report, the Focal Point should in addition to the information collected from the promoter (see section 2) give a summary statement on the success of the project.

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### **3.2 Cooperation between the Focal Point and the FMO**

The Focal Point sets up annually a work plan with the FMO leading up to the annual meeting.

### **3.3 Annual meeting and annual report**

In order to ensure the effective implementation of the EEA Financial Mechanism and the Norwegian Financial Mechanism, annual meetings are held (i) between the EEA EFTA States and each Beneficiary State and (ii) between Norway and each Beneficiary State. The annual meetings for the two Mechanisms are to be regarded as separate meetings. However, for practical reasons, with regard to issues that are common to both mechanisms, there will be a joint meeting. For issues relating to the Norwegian Financial Mechanism only, a separate meeting will be held the same day, immediately following the joint meeting. The first meeting is to be held no later than one year after the MoU enters into force<sup>3</sup>.

The Focal Point organises the annual meetings in cooperation with the Financial Mechanism Office. The Commission of the European Communities may be invited to observe the meetings. The Focal Point drafts the minutes of the meeting.

The Focal Point presents at the annual meeting an annual report on the implementation of the mechanisms in the Beneficiary State in question. Formally, there will have to be one report on the EEA Financial Mechanism and one report on the Norwegian Financial Mechanism. However, for practical reasons, with regard to issues that are common to both mechanisms the two reports may have common parts. The annual reports are of fundamental importance in ensuring that the implementation of the financial mechanisms is progressing and that progress is made in achieving the overall aim of the Mechanisms.

The annual reports must be submitted to all participants of the annual meeting minimum 10 working days before the meeting.

The annual reports should give comprehensive information on the implementation during the period under review. The annual reports provide an overview of the implementation of the EEA Financial Mechanism and of the Norwegian Financial Mechanism in the Beneficiary State and compile information the Focal Point has received from the promoters and intermediaries during the year. They should also provide a plan for the implementation of the mechanisms in the Beneficiary State in question during the coming period. The programming framework set out in the Annex B and the specific forms of grant assistance set out in the Annex C to the MoUs are reviewed at the annual meeting.

The annual reports should cover, but not to be limited to, the following issues:

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<sup>3</sup> Accordingly, the annual report submitted at the first annual meeting will cover a period shorter than 12 months.

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*Progress made towards the achievement of the overall objective of the EEA Financial Mechanism and the Norwegian Financial Mechanism and progress made towards Beneficiary State specific objectives.*

The reports should review the potential of the programming framework in the Beneficiary State in question and the projects financed under the Mechanisms in achieving the overall objectives of the EEA Financial Mechanism and the Norwegian Financial Mechanism. The reports should also review the progress made towards possible Beneficiary State specific objectives.

The reports should include summary information on sector distribution of the grants and describe how the projects financed under the mechanisms have benefited the priority sectors.

#### *Progress of project selection in the Beneficiary State*

The reports should give an overview of the project identification process and the results thereof (including a possible seed money facility). A complete list of applications received by the Focal Point during the year should be included.

The said lists must also include all rejected projects, i.e. projects which the Focal Point, the Intermediate Bodies or any other body that received applications did not forward to the Financial Mechanism Office. As for rejected projects the report must give the full title of the project, the amount applied for and specify the applicants and the priority sector. On request from the donor states the Focal Point could be requested to provide the reason for the rejection.

#### *Financial progress pertaining to commitments and disbursements*

A summary of commitments made and disbursements effected should be provided. The commitments should be compared with annual commitment ceilings. Reasons for possible problems relating to absorption and/or disbursements should be detailed and analysed. Solutions to possible problems should be proposed.

#### *Project promoters*

The annual reports should include summary information on project promoters i.e. what types of entities have applied for/received funding.

#### *Target groups*

The annual reports should include summary information on groups/entities that have been affected by projects financed by the two mechanisms.

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#### *Compliance with Community policy and legal issues, including tendering and procurement*

The annual reports should include a statement by the Focal Point on projects' compliance with Community Policy, including tendering and procurement. The reports must include information on any legal problems relating to the implementation of the financial mechanisms that have appeared or are likely to appear.

#### *Cross cutting issues*

The reports should include a section on cross cutting horizontal issues. The three dimensions of the sustainable development, i.e. environmental, economic and social (including social dialogue and social advantages/disadvantages) should be covered. Also issues relating to gender equality and good governance should be addressed. Finally, the reports should assess the effects the projects have had on bilateral relations between the EEA EFTA States and the beneficiary state.

#### *Managerial set-up in the Beneficiary State*

The Focal Point should in the annual reports address the managerial set-up (Annex A to the MoU) for implementation in the Beneficiary State, and discuss possible problems and propose solutions.

#### *Public awareness*

The annual reports should describe the information activities carried out in the beneficiary state, both in terms of general publicity measures and project publicity measures as described in the *Publicity Guidelines*. Firstly, the description should aim to give an overall presentation of the publicity activities performed within the period. Secondly, the description should specify the type of activities undertaken, the target group(s) for those activities as well as the result or impact of the publicity measures.

#### *Planning for the following year: fields of intervention and measures and a work plan*

The programming framework set out in the Annex B and the specific forms of grant assistance set out in the Annex C to the MoUs are reviewed at the annual meeting if needed. A work plan outlining the important stages of the implementation of the financial mechanisms in the Beneficiary State in question should be established for the following year.

The annual progress reports (see sections 2.2 and 3.1 ) received by the FMO throughout the reporting year will form an integral part of the annual reports presented for the annual meetings. Also the audit plan for the coming year and the summary of audit reports for the reporting year will be attached to the annual report.

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### Annex I – Model template for project interim report

FINAL BENEFICIARY	
Full legal name:	
Registered address:	
Contact person:	
Telephone:	
Mobile:	
Telefax:	
E-mail:	
Grant agreement number:	Grant rate:
Local currency:	
Claim period: From	To:
Payment claim number:	
Project planned start date:	Project actual start date:
Project planned completion date:	Project estimated completion date:
Project estimated percentage complete:	

PART I PAYMENT CLAIM																																							
Planned claim euro	Outstanding advance prior to claim																																						
Actual claim euro	Outstanding advance after this claim																																						
Brief description of overall project progress versus planned:																																							
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2" style="width: 15%;">Total previously reported</th> <th colspan="6" style="text-align: center;">Claim period</th> <th rowspan="2" style="width: 10%;">Total</th> </tr> <tr> <th>mm-yy</th> <th>mm-yy</th> <th>mm-yy</th> <th>mm-yy</th> <th>mm-yy</th> <th>mm-yy</th> </tr> </thead> <tbody> <tr> <td>Total eligible expenses in local currency</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>Exchange rate</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>Total eligible expenses in euros</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </tbody> </table>		Total previously reported	Claim period						Total	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	Total eligible expenses in local currency								Exchange rate								Total eligible expenses in euros							
Total previously reported	Claim period						Total																																
	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy																																	
Total eligible expenses in local currency																																							
Exchange rate																																							
Total eligible expenses in euros																																							
<p><b>PAYMENT CLAIM CERTIFICATION</b></p> <p>The Paying Authority hereby certifies (i) that the summary of eligible expenses submitted by the promoter of the Project is in full conformity with the supporting documents, (ii) that the supporting documents have been examined and found to be authentic, correct and accurate, (iii) that they are based on verifiable accounting which is in compliance with sound accounting principles and methods, (iv) that claimed expenses fall within eligible expenses under Detailed Eligibility Provisions – Expenditures, (v) that claimed expenses are incurred as part of the implementation of the Project in accordance with this Grant Agreement, (vi) and that sufficient audit trail exists.</p> <p style="text-align: center;">Done in [place], [date] For the Paying Authority</p> <p style="text-align: center;">..... [Name] [Title]</p>																																							

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PART II PROJECT PROGRESS AND INDICATORS								
Activity number:	<input type="text"/>	of	<input type="text"/>					
Activity description:	<input style="width: 100%;" type="text"/>							
Planned expense euro	<input style="width: 100%;" type="text"/>							
Actual expenses euro	<input style="width: 100%;" type="text"/>							
Activity planned start date:	<input style="width: 50px;" type="text"/>	Activity actual start date:	<input style="width: 100px;" type="text"/>					
Activity planned completion date:	<input style="width: 50px;" type="text"/>	Activity estimated completion date:	<input style="width: 100px;" type="text"/>					
Activity estimated percentage complete	<input style="width: 100%;" type="text"/>							
Brief description of overall project progress versus planned:	<input style="width: 100%;" type="text"/>							
	Total previously reported	Claim period						Total
		mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	
Total eligible expenses in local currency	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>
Exchange rate	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>
Total eligible expense euro	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>

  

Activity number:	<input type="text"/>	of	<input type="text"/>					
Activity description:	<input style="width: 100%;" type="text"/>							
Planned expense euro	<input style="width: 100%;" type="text"/>							
Actual expenses euro	<input style="width: 100%;" type="text"/>							
Activity planned start date:	<input style="width: 50px;" type="text"/>	Activity actual start date:	<input style="width: 100px;" type="text"/>					
Activity planned completion date:	<input style="width: 50px;" type="text"/>	Activity estimated completion date:	<input style="width: 100px;" type="text"/>					
Activity estimated percentage complete	<input style="width: 100%;" type="text"/>							
Brief description of overall project progress versus planned:	<input style="width: 100%;" type="text"/>							
	Total previously reported	Claim period						Total
		mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	
Total eligible expenses in local currency	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>
Exchange rate	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>
Total eligible expenses in euros	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>

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<b>Activity number:</b>	<input type="text"/>	of	<input type="text"/>					
<b>Activity description:</b>	<input style="width: 100%;" type="text"/>							
<b>Planned expense euro</b>	<input type="text"/>							
<b>Actual expenses euro</b>	<input type="text"/>							
Activity planned start date:	<input type="text"/>				Activity actual start date:	<input type="text"/>		
Activity planned completion date:	<input type="text"/>				Activity estimated completion date:	<input type="text"/>		
Activity estimated percentage complete	<input type="text"/>							
<b>Brief description of overall project progress versus planned:</b>	<input style="width: 100%;" type="text"/>							
	<b>Total previously reported</b>	<b>Claim period</b>						
		mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	<b>Total</b>
Total eligible expenses in local currency								
Exchange rate	<del>X</del>							<del>X</del>
Total eligible expenses in euros								

  

**PROJECT INDICATORS**

	Description of objective	Indicators		
		This period	Previous period	Baseline
<b>Results</b> (goods and services produced)				

  

**PROJECT PROGRESS CERTIFICATION**

The Focal Point hereby certifies that the status reporting of the activities and project indicators described above are accurate.

Done in [place], [date]  
For the Focal Point

.....  
[Name]  
[Title]

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<b>PART III PROJECT REVENUE</b>								
	Total previously reported	Claim period						Total
		mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	
Total revenues in local currency								
Exchange rate	<del>X</del>							<del>X</del>
Total revenues in euros								

**CERTIFICATION**  
The Paying Authority hereby certifies that the above reporting on project revenue is accurate.

Done in [place], [date]  
For the Paying Authority

.....  
[Name]  
[Title]

<b>PART IV CO-FINANCING CERTIFICATION</b>								
Planned total co-finance EURO	<input style="width: 100%;" type="text"/>							
Actual total co-finance EURO	<input style="width: 100%;" type="text"/>							
	Previously Reported	Claim period						Total
		mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	mm-yy	
Cash co-finance								
Value of in-kind co-finance								
Total in-kind contribution and cash								
Source of cash co-finance	<del>X</del>	Text box	Text box	Text box	Text box	Text box	Text box	<del>X</del>
Description of in-kind co-finance	<del>X</del>	Text box	Text box	Text box	Text box	Text box	Text box	<del>X</del>

**CO-FINANCING CERTIFICATION**  
The Paying Authority hereby certifies that the co-financing has been made available and paid to the promoter as described above.

Done in [place], [date]  
For the Paying Authority

.....  
[Name]  
[Title]

<b>PART V SIGNATURE</b>
<p>I certify that I am duly authorized to sign this Project Interim Report and that I have thoroughly reviewed the payment claim, revenue, project progress, co-finance and project indicators provided in this report and that the information and claim are correct and accurate. I confirm that this project is carried out as described in the Grant Agreement and that the payment claim reflects correctly the incurred expenses.</p> <p style="text-align: center;">Done in [place], [date] For the Project</p> <p style="text-align: center;">..... [Name] [Title]</p>

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**Annex II – Model template for annual progress report**

<b>FINAL BENEFICIARY</b>			
Full legal name:			
Registered address:			
Contact person:			
Telephone:			
Mobile:			
Telefax:			
E-mail:			
Grant agreement number:	<input type="text"/>	Grant rate:	<input type="text"/>
Local currency:	<input type="text"/>		
Reporting period (12 months):	From: <input type="text" value="mm-yy"/>	To: <input type="text" value="mm-yy"/>	
Project planned start date:	<input type="text"/>	Project actual start date:	<input type="text"/>
Project planned completion date:	<input type="text"/>	Project estimated completion date:	<input type="text"/>
Project estimated percentage complete	<input type="text"/>		



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<b>PART II PROJECT INDICATORS</b>				
	Description of objective	Indicators		
		This period	Previous period	Baseline
<b>Purpose</b> (direct and immediate effects)				
<b>Results</b> (goods and services produced)				

**Brief description including cross cutting issues relevant for the project:**

<b>PART III RISK ANALYSIS SUMMARY</b>
<p><b>Brief description of project risks and planned mitigating action</b></p> <div style="border: 1px solid black; height: 150px; width: 100%;"></div>

<b>PART IV SIGNATURE</b>
<p>I certify that I am duly authorized to sign this annual progress report, that I have thoroughly reviewed the information provided in this report, and that the information is correct and accurate. I confirm that this project is carried out as described in the Grant Agreement and that the report reflects correctly the project progress.</p> <p style="text-align: center; margin-top: 20px;">Done in [place], [date] For the Project</p> <p style="text-align: center; margin-top: 10px;">..... [Name] [Title]</p>

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<b>PART V SIGNATURE</b>
<p>PROJECT PROGRESS CERTIFICATION The Focal Point hereby certifies that the status reporting above is accurate.</p> <p>Done in [place], [date] For the Focal Point</p> <p>..... [Name] [Title]</p>

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**Annex III – Model template for project completion report**

<b>FINAL BENEFICIARY</b>			
Full legal name:			
Registered address:			
Contact person:			
Telephone:			
Mobile:			
Telefax:			
E-mail:			
Grant agreement number:	<input type="text"/>	Grant rate:	<input type="text"/>
Local currency:	<input type="text"/>		
Reporting period (12 months):	From: <input type="text" value="mm-yy"/>	To: <input type="text" value="mm/yyyy"/>	
Project planned start date:	<input type="text"/>	Project actual start date:	<input type="text"/>
Project planned completion date:	<input type="text"/>	Project actual completion date:	<input type="text"/>



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<b>PART II PROJECT INDICATORS</b>				
	Description of objective	Indicators		
		This period	Previous period	Baseline
Overall Objective (long-term effects)				
Purpose (direct and immediate effects)				
Results (goods and services produced)				

**Comments on overall achievement against the original plan, on cross cutting issues and prospects for sustainability of benefits:**

<b>PART III SPECIFIC CRITERIA</b>
<b>Comments on specific criteras set out in the grant agreement:</b>

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**PART IV  
LESSONS LEARNED AND RECOMMENDATIONS**

**PART V  
SUMMARY STATEMENT BY THE FOCAL POINT**

**PART VI  
SIGNATURE**

I certify that I am duly authorized to sign this project completion report, that I have thoroughly reviewed the information provided in this report, and that the information is correct and accurate. I confirm that this project is carried out as described in the Grant Agreement and that the report reflects correctly the project result.

Done in [place], [date]  
For the Project

.....  
[Name]  
[Title]

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<b>PART VII SIGNATURE</b>
<p style="text-align: center;">CERTIFICATION The Focal Point hereby certifies that the status reporting above is accurate.</p> <p style="text-align: center;">Done in [place], [date] For the Focal Point</p> <p style="text-align: center;">..... [Name] [Title]</p>