**ANNUAL STOCKTAKING REPORT**

**Name of programme/Bilateral Development Programme in [country X]**

|  |
| --- |
| **Name of Strategic Partner:**  |
| **Total Danish Contributions in the period:** | **Review Date:**  |
| **F2:**  | **MFA unit in charge:**  | **Duration of the Partnership:**  |

The annual stocktaking report should summarise key findings of the annual stocktaking review for documentation and follow up. Annual stocktaking reviews are mandatory for all projects and programmes above DKK 39 million.

Annual stocktaking reviews are undertaken by the responsible MFA unit before 15 June as an internal exercise, not requiring external assistance (unless there is a dedicated MEAL team attached to the programme). Annual stocking reviews have a qualitative focus and should assess progress and strategic developments, challenges, learning, new entry points and possible adjustments. They will be based on input from available partners’ reports, dialogue with partners and other stakeholders, outcome of reviews, studies and evaluations carried out during the year, as well as other relevant sources.

If updated information is available on progress in financial and programme implementation, the two overview templates presented in Annex A can be attached to the report.

For Bilateral Development Programmes (BDP), and other large programmes using the programme design and approval mechanisms for BDPs, annual stocktaking reports should be drafted for each project in the programme and a summary of findings should be presented in an overall programme-level stocktaking report of 3-5 pages. For these programmes, the overview templates in Annex A will be replaced by an overall narrative assessment of progress in financial and programme implementation, with special attention paid to projects for which there are special concerns.

Overall annual stocktaking reports for BDPs are presented to the Council for Development Policy (UPR) for information to allow dialogue and follow up on the progress of the BDPs.

**Theory of Change and Assumptions (½ page)**

Lessons learnt during the year with regard to the Partner organisation’s Theory of Change:

* Is the objective still relevant?
* Are the outcomes still relevant and achievable? Are they filling in the “missing middle” between the activities and outputs under control of the project and the desired goals of the project outside its control; i.e. how will change actually happen?
* Is the outcome framework in which some outcomes are preconditions for other outcomes still realistic; i.e. the “if; then and because” causal linkages.
* Are underlying assumptions and risks still valid?

**Outcome of Danish policy dialogue with the partner organisation (½ page)**

* What has worked and what has worked less well?
* Possibilities to build alliance with others?
* How receptive has the organisation been in relation to Danish priorities?
* Has the policy dialogue led to improvement in performance and better results?
* Is there a need to adapt the Danish strategic approach, for instance in collaboration with other parties and stakeholders?

**Concrete synergies pursued during the year (½ page)**

* In bilateral cooperation supported by other donors at the country level, including multi-bi cooperation
* In relation to multilateral organisations active in the country
* Synergies with other Danish instruments (humanitarian, business instruments, etc.)
* With Danish diplomatic initiatives for instance aimed at improving international norms and standards; advancing commercial ties; furthering human rights and democracy; working for inclusion of marginalized groups; gender equality and/or other relevant topics.

**Overall assessment of progress in financial and programme implementation** (only for BDPs)

**Annex A**

**Financial status**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** |
| **Commitment Total** **(DKK million)****[Period]** Fx. 2019-2023 | **Disbursed Total accumulated** **(DKK million)****[Period]**Fx. 2019-2021 | **Partner accumulated spending [[1]](#footnote-1)****(DKK million)****[Period]**Fx.2019-2021 | **Share of disbursement spent (3/2) (%)****[Period]**Fx.2019-2021 | **Unspent balance with partner [[2]](#footnote-2)****(DKK million)** **(2 – 3)****[Period]**2019-2021 |
| Fx DKK 60 million | DKK 30 million | DKK 20 million | 20/30=67% | DKK 10 million |

**Results progress**

|  |  |  |  |
| --- | --- | --- | --- |
| **Main result area supported****(by outcome or programmatic area, as relevant)***Summarize each main result area targeted with the support, drawing from the results framework and/or partner’s planning framework. The summaries can be in form of narratives.* | **Overall progress since the start of implementation***Summarize overall progress by the partner on each of the main areas of result supported. Can be in narrative form, drawing from partner’s reports, and other sources.* | **Progress during the year of reporting***Main progress on these results observed during the last year: To what extent were targets and expectations achieved? Did any results not planned occur? Brief narrative statements.* | **Comments***Mention key factors that explain the level and type of progress and performance of the partner.*  |
| **1.** |  |  |  |
| **2.** |  |  |  |
| **…** |  |  |  |
|  |  |  |  |
|  |  |  |  |

1. According to the latest financial reporting [↑](#footnote-ref-1)
2. Important to check against partner committed expenses, not yet disbursed (partners should have sufficient funds for the next six months period of operations, but not accumulate funds) [↑](#footnote-ref-2)