

# **FINAL EVALUATION OF THE FUND FOR BILATERAL RELATIONS**

## **Executive Summary**

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## BACKGROUND, PURPOSE AND OBJECTIVES OF THE EVALUATION

### BRIEF OVERVIEW OF THE FUND FOR BILATERAL RELATIONS

The Fund for Bilateral Relations (FBR), established under the 2014–2021 EEA Financial Mechanism, aimed to strengthen bilateral relations between the Donor States (Norway, Iceland, and Liechtenstein) and the Beneficiary State (Portugal). The FBR represented a minimum of 2% of the total allocation to Portugal, amounting to €3,188,788.

Funding was provided to both predefined bilateral initiatives and those selected through open calls. Eligible partners included public and private entities, for-profit and non-profit organisations, civil society organisations, and international bodies legally established in Donor States, Portugal, other Beneficiary States, or actively involved in the funded initiatives.

A total of 118 projects were supported, including 16 predefined initiatives and 102 selected through calls (57 in the first and 45 in the second). Additionally, over seven activities were directly implemented by the National Focal Point (NFP). These initiatives involved 92 partners from Norway and 12 from Iceland, resulting in 62 new partnerships across priority areas such as business development, joint research and innovation, disaster prevention, employment and social inclusion, public health, justice and prison systems, pandemic response, child protection, gender equality, environment and climate change, and culture.

### SCOPE AND OBJECTIVES OF THE EVALUATION

The evaluation was commissioned by the NFP of the EEA Financial Mechanism to assess the implementation of the FBR and inform improvements for future mechanisms. It followed the EEA Grants Guidelines for Programme Evaluation<sup>1</sup>, with a formative approach focused on relevance, efficiency, effectiveness, impact, and sustainability.

In this context, the evaluation seeks to clarify the processes that lead to and explain the results, enabling the construction and validation of a Theory of Change. The aim of the evaluation results is to gather evidence and recommendations for improvements in FBR.

## METHODOLOGY

The final evaluation of the Fund for Bilateral Relations constitutes a complex exercise focused on an in-depth analysis of the dynamic chain of outputs, outcomes, and impacts of the projects supported since the beginning of FBR's implementation.

The methodological framework was based on the application of the Theory-Based Evaluation Approach (TBE) – specifically, Contribution Analysis – using triangulation of the main analytical elements resulting from the adopted multi-method approach. This included:

- desk research (including analysis of project documentation),
- semi-structured interviews with the NFP and other relevant stakeholders,
- case studies, and
- a questionnaire survey applied to the supported bilateral initiatives.

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<sup>1</sup> Results Guideline Rules and Guidance on how to design, monitor and evaluate programmes, manage risks, and report on results Adopted by the Financial Mechanism Committee on 9 February 2017 Updated March 2021.

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## KEY FINDINGS

### RELEVANCE

Strengthening bilateral relations between national entities and those from Donor States is a core element of the EEA Grants as defined in its Memorandum of Understanding for the EEA FM 2014-2021 (MoU). In this regard, the FBR was specifically designed to reinforce relations between Portugal and the Donor States and to address key constraints, namely insufficient cooperation in specific areas, lack of mutual knowledge networks, and economic and social disparities.

Bilateral relations refer to cooperation between institutions and individuals in the public, political, private, academic, and civil society sectors. The FBR seeks to reinforce the bonds between Portugal and the Donor States through the funding of bilateral initiatives that promote strategic cooperation, networking, knowledge exchange, and joint activities.

The evaluation acknowledges the relevance and responsiveness of the FBR to these challenges and opportunities, with a clear evaluative judgement:

- Combination of support and strategic focus on priority areas of significant bilateral interest and/or with existing successful cooperation, aligned with the strategic objectives set out in the MoU, while also exploring new areas of bilateral interest and establishing new partnerships, including in areas where EEA Grants had no intervention;
- Integration of predefined projects with open calls, creating space for new cooperation opportunities across a wide range of areas, including emerging fields;
- Capacity to engage a heterogeneous group of partners, including institutions and individuals from the public and private sectors, academia, civil society, and the business community—many of whom had no prior knowledge or experience with EEA Grants;
- Enhanced dissemination, visibility, and recognition of the EEA Grants;
- Positive contribution of the projects to addressing the main identified issues of insufficient cooperation in specific domains and lack of mutual trust networks.

### OPERATIONAL EFFICIENCY

The establishment of partnerships with entities from the Donor States is a mandatory element for the development of bilateral initiatives, with their formation and functioning being critical to their success and to achieving the results of the FBR.

Most supported initiatives involved new partnerships, with prior knowledge and contacts with partners, connections established at conferences and other events, or referrals from third parties being the main means used to form these partnerships. The evaluation found that no formal mechanisms were used by the surveyed promoters to support partnership formation (such as matchmaking tools); however, promoters did not consider this to be a critical issue. This positive assessment stems from the fact that most supported initiatives were based on prior knowledge of the partners and/or their work, and on the existence of shared interests.

Regarding the mechanisms supporting the functioning of partnerships and the assistance provided by the NFP, promoters expressed a generally positive view, although there was no unanimity among those consulted, particularly in the context of case studies. Some promoters positively assessed the support for administrative management and the availability to resolve emerging issues, as well as the bureaucratic burden of the FBR. Others were more critical, considering the bureaucratic burden excessive in relation to the amounts involved, and pointing to complexity and lack of clarity in expense justification procedures (including the need to respond to clarification requests, submit additional information, and the resulting delays in approval and reimbursement).

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The absence of an integrated information system hinders the reporting process for promoters and prevents the NFP from having agile access to data on physical and financial execution. It also makes it difficult to quantify overall performance indicators, for example. This is a cross-cutting issue affecting all EEA Grants programmes in Portugal and should be addressed in the next financial mechanism.

Regarding the functioning of partnerships and collaborative work, promoters provided a very positive assessment. Satisfaction levels stem from the high degree of involvement and contribution of partners at different stages of the initiative cycle, reflecting how partnerships were formed and the genuinely bilateral nature of the work carried out, which in most projects began at the design stage.

Promoters also indicated that factors such as mutual trust for sharing knowledge and best practices, clear definition of roles/responsibilities/activities for each partner entity, and the availability of funding and organisational budgets for project development were facilitators of cooperation. Administrative and logistical burdens inherent to the partnership, and especially the COVID-19 pandemic, were the dimensions that most constrained project development.

## EFFECTIVENESS

In general, the bilateral initiatives carried out the activities and delivered the outputs defined in their applications, achieving (and in some cases exceeding) the objectives they had set.

## OUTPUTS

The evaluation collected evidence of a wide range of outputs, reflecting the goals of each initiative:

Activity Type	Number of bilateral initiatives surveyed that developed this activity	Number of activities carried out	Number of Participants
Matchmaking Events	23	168	-
Internships	10	-	37
Study Visits	31	77	294
Training Courses	14	-	399
Technical Cooperation	45	26 cooperation protocols	-
Workshops & Seminars	57	-	3726
Studies & Publications	104	58 studies, 108 articles	-
Campaigns, Exhibitions and Promotional Materials	41	120 Exhibitions and Promotional Materials 46 videos	-

## RESULTS

The supported bilateral initiatives contributed to the achievement of all intermediate results and objectives of the Bilateral Relations Fund (BRF), as outlined in the Theory of Change (ToC). The following figures summarise the main intermediate results achieved.

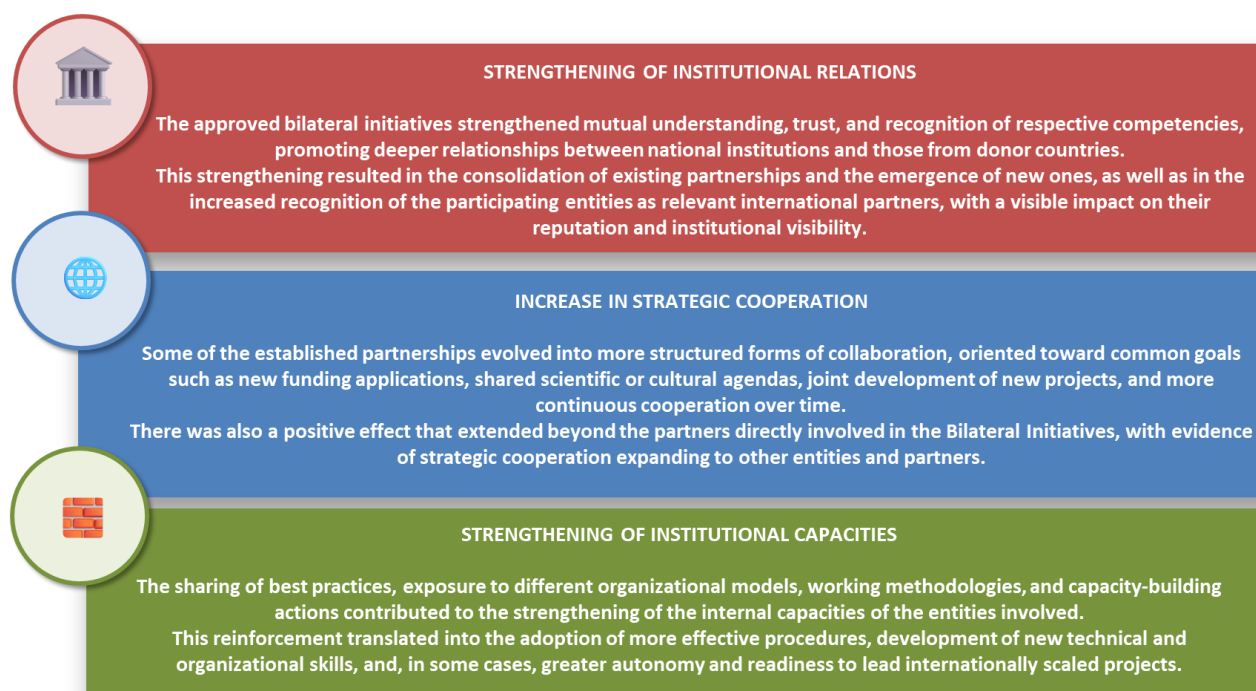
The testing of the ToC through contribution analysis aimed to gather information and evidence on how the established system and implemented activities contributed to the achievement of the expected Intermediate Results (IR) and Final Results (FR). From the perspective of contribution analysis, it is also important to highlight that the initially defined assumptions are considered decisive for the success of the projects. Notably, the assumption of mutual trust and recognition of shared interests, as well as the added value of partnership-based projects, were acknowledged by both promoters and partners. These stakeholders demonstrated a willingness to share knowledge, resources, intervention models, and best practices.

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## Main Intermediate Results Achieved



## Main Final Results achieved





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**Executive Summary****SUSTAINABILITY**

Most of the projects implemented demonstrate elements of potential sustainability—some dependent on leverage funding, others on political and institutional recognition and investment. Among the key determinants of cooperation sustainability, shared interest and recognition of mutual benefits for the entities involved are the most evident. The establishment of trust-based relationships and collaborative working practices—through the sharing of experiences, knowledge, resources, and participation in international networks—also play a significant role in sustaining partnerships.

The triangulation of collected evidence also indicates that a significant portion of the results achieved have been integrated into the regular operations of the participating entities. Furthermore, in more than half of the cases, there is clear evidence of new projects being developed based on the activities carried out under the FBR.

There is substantial evidence that the partnerships established will continue beyond the funding period. For instance, 38% of entities maintain regular contact and ongoing partnerships or joint projects with their counterparts, and nearly half maintain such relationships on a more occasional basis. Only a residual number of projects saw these relationships discontinued, making this one of the FBR's most solid outcomes in Portugal.

Additionally, in 55% of cases, there has been a deepening of bilateral relations post-project, with the development of new cooperation initiatives and projects. In parallel, 40% of the surveyed projects indicated that they would continue in practice. Only around 33% of projects are not expected to continue, although the partnerships and mutual trust established are expected to serve as a foundation for new collaborative processes.

This result is further confirmed by the effective intention to replicate the project in other contexts. Although 33% of projects could not confirm this, 16% had already been replicated, and over 33% had replication planned.

The evaluative judgement arising from this analysis points to a high potential for generating sustainable impacts in the thematic areas addressed by the funded initiatives. This is observed across all intervention areas. The legacy of some projects paves the way for further research and collaborative networks that will continue to influence the future of the respective sectors.

However, financial conditions stand out as one of the most decisive factors for project sustainability. Experience shows that initial funding is essential for implementation but not always sufficient to ensure continuity—particularly in the context of the FBR. Excessive reliance on public calls with limited and unpredictable budgets reinforces this vulnerability.

In summary, the sustainability of FBR projects depends on the availability of additional funding—whether through new projects, national or international support, or innovative financing mechanisms. Many projects were described as pilot initiatives for future funding applications, but their continuation depends on diversifying funding sources.

Moreover, the institutionalisation of good practices and procedures shared through bilateral partnerships depends on external factors, such as political and institutional recognition of the practices, products, and results achieved—especially when these include reports and recommendations intended for policymakers.

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## RECOMENDATIONS

## RELEVANCE

- Maintain the combined model of predefined initiatives and open calls
- Maintain a flexible approach in defining priority areas, allowing for adjustment to emerging needs and changing contexts
- Consider offering different funding scales with tailored duration and eligible cost structures
- Prioritise initiatives that ensure continuity or replication of previous results
- Promote (through selection criteria) bilateral initiatives involving interdisciplinary and cross-sectoral partnerships in emerging areas such as digital transformation, artificial intelligence, green transition, democracy, rule of law and human rights, social inclusion, and resilience

## OPERATIONAL EFFICIENCY

- Develop a matchmaking tool for Portuguese and Donor State entities, with local facilitators
- Promote matchmaking events before each call
- Simplify administrative and financial procedures (e.g. use simplified cost options)
- Provide clear guidance and templates for promoters
- Strengthen the dissemination of the EEA Grants regarding the available support and calls for proposals in Portugal and in the Donor States
- Create an integrated information system for applications, reporting, monitoring, and evaluation
- Organise regular exchanges and discussion sessions among bilateral project promoters
- Establish a predictable timeline for calls (e.g. annual calendar or rolling applications)

## EFFECTIVENESS

- Clearly define what is meant by each type of activity, such as study visits, exchanges, internships, etc.
- Establish a validation or certification mechanism for the products developed under the Bilateral Initiatives
- Implement a monitoring mechanism for FBR through the definition of output and outcome indicators
- Create a community of practice among EEA Grants beneficiary states (e.g. online forums, peer reviews, conferences)

## SUSTAINABILITY

- Increase budget allocation to support long-term partnerships
- Extend implementation periods where needed
- Evaluate sustainability strategies as part of the selection process (includes structured planning and effective mechanisms for the exploitation of project results and outputs)
- Offer training and mentoring on how to sustain and exploit project results (e.g. fundraising, dissemination strategies)
- Encourage dissemination and engagement with target groups most likely to benefit from the results
- Formalise partnerships through legal agreements or long-term cooperation frameworks
- Promote replication through regional and sectoral action roadmaps
- Raise awareness among national/regional authorities to adopt successful project outputs, methods, and recommendations
- Share best practices, technical reports, and implementation experiences through structured knowledge-sharing events