

Glossaire - OPSYS

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Please find below a table of the most common terms, acronyms and definitions used in OPSYS.

Term	Acronym	Definition
Action	ACT	<p>An Action is defined as a <i>group of coherent high-level activities, intended to achieve a defined policy objective, using allocated EU funding</i>. As per the Financial Rules and the CIR, it is a generic term describing the content of any Global Budgetary Commitment (Commitment Level-1) under a Commission Financing Decision.</p> <ul style="list-style-type: none">• An Action is associated to a single Global Budgetary Commitment;• An Action take form and is described in an Action Document (AD), or equivalent document;• One or more Actions are grouped under a Commission Financing Decision, such as an Annual Action Programme (AAP). <p>In some cases (e.g. Administrative Expenditure), it is reduced to core information.</p> <p>Actions are key entities in the Identification and Formulation Phases of the Cycle of Operations. They are composed of Action Components, they contribute to Interventions, are covered by Financing Agreements.</p>
Agent Responsible for Opening Submissions	AROS	<p>In order to proceed with the evaluation of the offers received following a Request for Service, the Evaluation Committee will need to access the technical and financial offers submitted by the Contractors.</p> <p>To ensure the confidentiality of this process, only a designated person from each Delegation will have the right to access the offers and to share them with the Evaluation Committee. This role is fulfilled by the Agent Responsible for Opening Submissions (AROS).</p>
Basic Acts	BA	<p>Regulations establishing instruments for financing external action (commonly known as Financing Instruments) are <i>legislative acts</i> that further subdivide the funds of the MFF. They define the legal framework, the scope of programmes, and specify which actors and which areas are eligible for funding. Each <i>legislative act</i> has its own specific objectives and geographical coverage. Some are global and thematic; some have a geographical focus, while others have both thematic and geographic components.</p> <p>For the Budget, the <i>legislative act</i> is required by the <i>Financial Regulation</i> and is called a Basic Act.</p> <p>For the EDF, the <i>legislative act</i> corresponds to the respective <i>Implementation Regulation</i> (e.g. 11th EDF Implementation Regulation).</p> <p>The Common Foreign Security Policy (CFSP) is a policy.</p> <p>For the OPSYS system behaviour, the term Basic Act will be used to cover the different Financing Instruments (Budget, EDF), and the CFSP.</p>

Commission Financing Decision	CFD	<p>The Commission Financing Decision (CFD) is used as a generic term to cover the various types of documents that express the Commission's exercise of its implementing competencies: (1) the exercise of its implementing powers ("mode décisionnelle"); and (2) its responsibility for budget implementation ("mode ordonnateur").</p> <p>Within the context of OPSYS, a Commission Decision that includes a Financing Decision will be called a Commission Financing Decision.</p> <p>In the framework of external action, a Commission Financing Decision can take various forms:</p> <ul style="list-style-type: none"> • An Annual Action Programme; • A Multi-annual Action Programme; • A National or Country Action Programme; • A Multi-country Action Programme; • A CBC Action Programme; • A Complementary Financing Decision; • An Individual Measure; • A Special Measure; • A Support Measure; • An Exceptional Assistance Measure; • An Interim Response Programme; • A Pilot Project; • A Preparatory Action; • A Preparatory Measure; • A One-off Action; • A Commission Decision implementing a CFSP Council Decision; • A Decision under the Commission's administrative autonomy. <p>A Commission Financing Decision can contain one or several Actions.</p>
Core /Reference Indicator		<p>Core Indicators are reference indicators belonging to pre-established DG-specific lists of indicators grouped by DAC sector codes (and instrument in the case of FPI and IPA).</p> <p>Core Indicators are managed by Quality Managers, and are suggested to the users by result level with the objective of harmonising and rationalising good practice indicators across projects and programmes.</p>
Current value		The latest value that is available for an indicator.
External Assistance Management Report	EAMR	<p>The EAMR is an annual internal management report, generated by the heads of EU Delegations across the world, which identifies potential difficulties and delays in the implementation cycle of ongoing EU development cooperation projects.</p> <p>It aids the European Commission services in taking corrective measures when current difficulties in the implementation procedure, or the achievement of the objectives, are reported.</p> <p>The EAMR is a snapshot of the situation of each ongoing project at the end of the year. It does not measure the results of the project. It therefore cannot be considered as an evaluation tool for assessing final effectiveness and outcome of the accomplished EU development projects in our partner countries, or of the eventual compliance with the financial rules.</p>
Implementation Modality		<p>An Implementation Modality is assigned to each component (or group of activities) in an Action to determine how this activity will be implemented in legal and financial terms.</p> <p>The Implementation Modality is a combination of the Type of Financing and the Management Mode.</p> <p>The <i>management mode</i> defines the way the activities are managed by the Commission. The <i>type of financing</i> defines the kind of expenditures that are accepted including the options between project approach or budget support.</p>
Implementation Plan	IMP	<p>The OPSYS Implementation Plan is the main <i>operational tool</i> to plan, organise, launch and monitor the implementation of Actions and Contracts. For planning purpose, the Implementation Plan is the "<i>fundamental element</i>" for all periodic forecasting at level of the <i>individual commitments</i> (Forecast Level 2 - FL2) and <i>payments</i> (Forecast Level 3 - or FL3); an overview of all channels for a Responsible Service; and has no geographical scope <i>per se</i>.</p> <p><i>The term "Implementation Plan" is defined, within the context of External Action and OPSYS, as the portfolio of all Contracting Procedures managed by a specific service or entity in charge (i.e. EU Delegation, HQ Unit, or Regional Team – for FPI). It can be monitored for any element of the portfolio, in particular for any Intervention.</i></p> <p>Each service's Implementation Plan displays in a tree list Actions with their planned/actual cost, their maturity level (OUTLINE, ONGOING, CLOSED), their components, their contracts, and the funds still available from the Programming Envelope(s), for the current and subsequent years of the MFF period.</p>

Implementatio n Type		<p>An Implementation Type <i>in OPSYS</i> is the Contracting Modality defined at the level of the Planned Contract, for a given <i>Impleme ntation Modality</i>, which is defined at the level of the Action Component.</p> <p>The following Implementation Types are available in OPSYS:</p> <ul style="list-style-type: none"> • Administrative Arrangements and Service Level Agreements • Administrative Expenditure except Procurement and European Schools • Budget Support • Contribution Agreement • Contribution to Executive Agency • Contribution to Traditional Agency and PPP • Contribution to Trust Funds • Delegation Agreement • Echo Experts under Employment Contracts and related logistic resources • Endorsed Grant • Endorsed Prize • Endorsed Procurement • European Schools • Financial Instrument • Grants • Membership Fees • Participation to use Financial Instruments • Prizes • Procurement Contract • Programme Estimates • R&D Experts and External Experts • Reimbursement of Travel and Subsistence for Experts • Sectorial Regulation/Commission • Sectorial Regulation/Member states • Shareholdings or Equity Participations in International Financial Institutions
Implem enting Partner /Expert	IP	<p>An Implementing Partner/Expert is an external partner implementing an intervention founded by the European Commission.</p>
Indicati ve Progra mming Docum ent	IPD	<p>Indicative Programming Document is a generic term used in the Basic Acts for all the documents that set the framework for EU assistance in a given country, region or thematic area for a multi-annual period, as defined in the different Instruments, such as Multi-annual Indicative Programmes (DCI), National Indicative Programmes (EDF), Indicative Strategy Papers (IPA) and Single Support Frameworks (ENI).</p> <p>If Indicative Programming Documents are based on Country Strategy Papers or Joint Programming Documents, the latter will be available in OPSYS.</p>
Indicat or		<p>An indicator is a variable specifying how performance can be measured and assessed. Together with the result's chain, indicators form the basis of a project's monitoring and evaluation system. They can be either qualitative or quantitative. Examples: maternal mortality rate, status of legal framework guaranteeing universal pensions</p>
Interve ntion	INTV	<p>The term "Intervention" comes from the Better Regulation package, where it refers to EU activities for assessing performance.</p> <p>In the external action context, Interventions are usually referred to as <i>Programmes</i> or <i>Projects</i>. In the EAMR, Interventions correspond to what is currently called "Project", which can be either a Contract or an Action.</p> <p>Within the context of OPSYS, an Intervention is a coherent set of activities and results that constitutes an effective level for the operational follow-up by the EC of its operations on the ground, which includes the monitoring of results and annual reporting on KPIs to Headquarters, the monitoring of missions and site visits, as well as evaluations.</p> <p>The scope of an Intervention corresponds, in most cases, to an Action or a part of it (an Action Component or a Contract).</p> <p>The scale of an Intervention and its level (Action, Action Component, Contract) is determined in function of:</p> <ul style="list-style-type: none"> • The coherence of the planned activities and results; and • The responsible service (e.g. Delegation in charge). <p>The Delegation will define the Intervention's level in the Action Document, which will be validated through the Quality Review process.</p>

Lead Implementing Partner or Contractor	Lead IP	<p>The Lead IP is the leader of the Consortium of Implementing Partners.</p> <p>Lead IPs provide access to Implementing Partners or Experts, so that they may access the relative interventions, allowing them to manage logframes and add or update indicators.</p>
Main Funding Action		<p>The Main Funding Action is the Action or Entity associated with the source(s) of funding from which the planned and future Contract will retrieve the DAC Form.</p> <p>The Main Funding Action is selected from the available options based on the source(s) of funding during the creation of the Planned Contract, and is the proposed solution (especially in the case of multiple Action Components funding the Contract) for indicating the Action from which to inherit the DAC Form for the Contract.</p>
Opening Session		<p>In order to proceed with the evaluation of the offers received following a Request for Service, the Evaluation Committee will need to access the technical and financial offers submitted by the Contractors.</p> <p>The offers are opened during the Opening Session task in OPSYS – Task Centre, which is performed by the Agent Responsible for Opening Submissions (AROS).</p> <p>During this Opening Session, OPSYS performs integrity and confidentiality checks on the technical and financial offers submitted by the Contractors, before they can be submitted to the Evaluation Committee for evaluation.</p> <p>Once the Opening Session is <i>complete</i>, and the received offers have been <i>checked</i> by the system, the AROS can proceed to the generation of the Opening Record.</p> <p>After the generation of the Opening Record, the Opening Session is closed, and the procedure proceeds to the Evaluation of the Offers step.</p>
Operational Manager	OM	<p>The Operational Manager, inside an EU Delegation or a HQ unit, is responsible for the operational follow-up of a project. They are the persons in charge of an Intervention in the EU Delegation or HQ Unit.</p> <p>They manage the operational part of the contractual relationship with the Lead Implementing Partner. They also has the responsibility to design and draft Logframes for Actions, and may be responsible for the annual activity reporting, either through the Annual Activity Reports, or the External Assistance Management Report (EAMR) (depending on the DG they work for).</p> <p>The Operational Managers can create, read, update and delete Interventions; and read, update, review, approve and delete Logframes for the Interventions they manage. The Operational Manager is responsible for assigning/un-assigning Lead Implementing Partners on the Interventions managed.</p>
Planned Contract		<p>The term "Planned Contract" refers to a possible contract that may materialise via a contracting procedure to be launched in the future.</p> <p>Planned Contracts are managed by the means of an Implementation Plan. The accuracy of information contained in a Planned Contract typically increases as the design of the related Action proceeds.</p> <p>Each contracting procedure must start from a Planned Contract, which is fully pre-defined.</p>
Pool of users		<p>In OPSYS, every time the user is required to perform specific operations, a new task is generated. These tasks are organised into a workflow. Each task within a workflow is also reserved and assigned to specific actors, or pool of users.</p> <p>As each task is reserved to specific actors or <i>pool of users</i>, then whenever a user performs a task, the user is participating in a procedure workflow.</p> <p>Subsequently, the users who are able to access, claim and fulfil the specific task (and complete the required operations within the task) are therefore determined based on the role and responsibility of that <i>pool of users</i> in the context of the <i>procedure workflow</i>.</p>

Portfolio		<p>A Portfolio is a list of Interventions and other related entities (e.g. Actions and Contracts). The Portfolio will also list Actions and Contracts that are not linked to Interventions (e.g. the design of the Action has not yet reached the stage where it is linked to an intervention – i.e. OUTLINE Actions).</p> <p>OPSYS - My Portfolio is a list of the user's Interventions and related entities, and will also contain as example, Actions and Contracts that are not linked to Interventions for the same reasons stated above.</p> <p>OPSYS – My Organisation Portfolio is a list of Interventions and related entities managed by the user's service (EU Delegation, HQ Unit, or Regional Team - for FPI). It will also contain, for example, Actions and Contracts of the user's service that are not linked to Interventions for the same reasons stated above.</p>
Responsible Service		<p>For most of the business objects (Action, Contract, etc.) managed in OPSYS, the service responsible for the initiation and the management of the object will be identified in OPSYS as the "Responsible Service". The Responsible Service can be either an EU Delegation, HQ Unit, or Regional Team (FPI) responsible for the business object.</p> <p>For example:</p> <ul style="list-style-type: none"> • An Agent that creates and manages an Action or Intervention is registered in an <i>organisational unit</i> which is the Responsible Service of these entities; • If the Agent belongs to a Unit in HQ, this Responsible Service is also the Lead Service; • The service coordinating for the Strategic Assessment, organisation of the Contributions, and of the Quality Review of an Action, and for launching the decision process of the related Commission Financing Decision, will be identified in OPSYS as the "Lead Service" for the Action.
Terms of Reference (Part A and B)	ToRs	<p>The Terms of Reference (Part A and Part B) are required for the preparation of the Request for Service under a Framework Contract.</p> <p>Once prepared, the Terms of Reference (Part A) is uploaded by the Operational Initiating Agent (OIA) to OPSYS. The Terms of Reference (Part B) is automatically generated by OPSYS using the structured data encoded by the OIA during the initiation and preparation of the request.</p>
Trust Funds	TF	<p>EU Trust Funds receive financing contributions from existing Basic Acts and/or additional sources (EU MS or other donors). Once the contributions have been transferred, these funds are technically followed up in OPSYS as Basic Acts, and be used as a separate source of funding for Actions, and are subject to specific reporting. They will therefore appear in OPSYS under the category "Basic Acts and Funds".</p>
Type of Expertise		<p>Expert requirements are defined at the level of the Specific Terms of Reference for a Request for Service under a Framework Contract. They are characterised as type of expertise "Individual", "Team", or "No Expertise" requirements per Framework Contract, Lot, and/or payment modality (Fee-based or Global Price) of the future contract.</p> <p><i>Fee-based Contracts</i> indicate specific profiles/skills <i>per Expert</i> or <i>overall Team</i>, so "Individual" or "Team" type of expertise is defined as a requirement for the Request for Service.</p> <p>In <i>Global Price Contracts</i>, expertise positions are generally not defined by the Contracting Authority, as Experts are mostly not assessed during the evaluation process of the offers. These Global Price Contracts focus more on outputs rather than inputs, and the type of expertise and requirements are already foreseen by the Framework Contractor. When the case, the type of expertise required is therefore not defined by the Contracting Authority at the level of the Request for Service, then "No Expertise" is indicated. The deliverables need to be well defined in the Terms of Reference if "No Expertise" is indicated as type of expertise for the Request for Service.</p>
DAC Sector Code (or purpose code)	DAC Sector	<p>The DAC Sector Code (or purpose code) represents the socio-economic sector that is targeted by the contribution to the project, and not to the mechanisms used to implement the aid.</p> <p>The sector of destination of a contribution is determined by answering the following question: "<i>Which specific area of the recipient's economic or social structure is the action intended to support?</i>"</p> <p>Some contributions are not susceptible to allocation by sector, and are reported as non-sector allocable aid. Examples are aid for general development purposes, general budget support, actions relating to debt, emergency assistance, and internal transactions in the donor country. http://www.oecd.org/dac/stats/purposecodessectorclassification.htm</p>

Results (or result level)		<p>In OECD terminology, results are defined as the outputs, outcomes or impacts of development interventions, with each element contributing to the next, as set out in a results chain.</p> <p>The links between each element are as important as the results themselves, reflecting the theory of change and the roles of providers and other stakeholders.</p> <p>http://www.oecd.org/dac/results-development/what-are-results.htm</p>
Impact (Overall Objective)		<p>Impact is the broader, long-term change, which will stem from a number of interventions by the partner government, development partners and other actors on which EU funded interventions will have indirect influence. Examples of impact indicators are percentage of the population living below the line of poverty, mortality rate of children under five years of age, etc.</p>
Outcome (Specific Objective)		<p>Outcome refers to a medium-term effect, and tends to focus on the changes in behaviour resulting from intervention outputs. EU funded interventions will contribute to these changes. Examples of outcome indicators are percentage of births delivered by skilled health personnel, number of human rights violation reported in local media, prevalence of under-weight children under 5 years of age.</p>

For further information on interventions and their definition you can download:

- [Summary Sheet for DG DEVCO's Management Meeting of 15 February 2018](#)
- [Summary Sheet for DG NEAR's Management Meeting - OPSYS terminology: Harmonisation of 5 key terms](#)
- [Note to the attention of DG NEAR's Senior Management - Formal adoption of the harmonised OPSYS terminology](#)

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