

## GLOSSARY OF ADB CONSULTING TERMS

### A

#### **ADB Business Opportunity Publication (ADB-BO)**

also known as the “Blue Book”. A publication issued monthly by the Bank informing about proposed projects and procurement as well as contract awards and projects for co-financing. The information contained in the publication can also be accessed through the Internet at the following address - <http://www.asiandevbank.org>

#### **ADB**

Acronym for the Asian Development Bank.

#### **administrative support staff**

staff such as secretarial and clerical personnel and drivers etc. The cost of these services will sometimes be provided free of charge by the Government.

#### **advantage of using firms**

a consulting firm will organize, control, supervise, administer and provide back-up support services whereas for individuals the employer will be expected to provide the organization, supervision and support services.

For these reasons when a team of experts is required it is usually an advantage to engage a firm rather than creating the team by selecting individuals from different sources.

#### **Advisory Technical Assistance (ADTA)**

Provided to help, establish or strengthen an institution carry out studies on sectoral policies and strategies or formulate national development plans.

#### **agenda**

list of items and topics to be discussed either at short-listing or evaluation meetings or at contract negotiations between the client and the consultant.

#### **allowances**

Payments made to the consultants during the performance of their services for specific purposes such as housing allowance, per diem allowance, etc.

**appendices, to contract**

Appendices usually included in the consultants' contracts are:

- A : Background Information and Terms of Reference
- B : Staffing Schedule
- C : Cost Estimate for the services. A payment Schedule is often included.
- D : Services, facilities and equipment to be Provided by the client.

**appendices, to invitation letter**

Appendices usually attached to the letter of invitation sent to the consultants invited to submit proposals are:

- Appendix 1 Information for Consultants
- Appendix 2 Instructions on Preparation of Technical Proposals
- Appendix 3 Instructions on Preparation of Financial Proposals
- Sample Contract
- Guidelines on the Use of Consultants by ADB and its Borrowers

**appraisal**

the Bank's final evaluation of a project, to determine its merits, suitability for financing, funding requirements and conditions for lending.

**appraisal report**

the report prepared by the mission undertaking the appraisal. The final version of this report will, together with other documents, be the basis for approval of the project by the Bank's Board of Directors.

**approach and methodology**

that part of the consultant's proposal explaining how the consultant proposes to carry out the services required.

**appropriate technology**

level of technological sophistication of proposed methods etc. which match local conditions and expertise as well as the budget available.

<b>arbitration</b>	settlement of contractual disputes by person(s) chosen to hear both parties and come to a decision which is binding on the parties.
<b>assignment</b>	the consultant services defined in the contract.
<b>associate firm</b>	a firm with which another firm has a contractual relationship for the purpose of jointly providing the services required for a project.
<b>association</b>	a contractual relationship between two or more consultants for the purpose of jointly providing the services required for a project.
<b>audit</b>	the client's review of the consultant's accounts and time and cost records relevant to the services in order to enable verification of billing rates and other costs relating to the project. Such review is usually undertaken by a certified auditor engaged by the client.
<b>authenticity declaration</b>	a declaration which is made by a Consultant as part of the financial proposal, to certify that the basic salaries of experts for this contract shown in the financial proposal to be relied upon by the Bank do not contain any allowances of any kind such as bonus payments, housing allowance, overseas allowance or any other such allowances.
<b>authorized representative</b>	a person assigned by a party to a project to represent that party during all phases of the project. Such a person is authorized to make binding decisions on behalf of the party particularly in relation to contractual matters.
<b><u>B</u> back-stopping</b>	special expertise available to the consultant in the form of technical and management support from the consultant's home office.

<b>background information</b>	data included in the invitation to consultants, giving the background to the project and providing knowledge about the project area and country and indicating the need for the project, its objectives and beneficiaries.
<b>Bank</b>	the Asian Development Bank.
<b>bar chart</b>	method of depicting service activities for a particular assignment, also known as an implementation schedule.
<b>basic monthly salary</b>	actual base salary payable on a regular basis by a firm to its permanent, full-time employees based on the employees' contracts of employment with the firm. This would be before any deductions or supplemental payments are made to the salary.
<b>billings</b>	accounts rendered by the consultants for their services and related costs.
<b>billing rate</b>	the agreed monthly rate payable by the client for a specific professional in the consultant's team.
<b>biodata</b>	equivalent to curriculum vitae (CV). A summary of an expert's professional qualifications, employment history and project experience.
<b>biodata proposal</b>	a proposal where only biodata of the experts involved are requested. Normally used for projects for which only a very limited number of experts is required for a short period of time.
<b>budget</b>	the amount of money allotted for a project or part(s) thereof.
<b><u>C</u> calendar day</b>	every day of a calendar month. For contracting purpose one calendar day is equal to 1/30th of a month.

**Central Operations Services  
Office (COSO)**

an office of the Bank which is responsible for central planning, monitoring and coordinating project processing and administration work programs, and for identifying and resolving procedural and institutional problems being experienced with the Bank's projects. It provides advisory services on procurement of goods and services and use of consultants; organizes and chairs meetings on procurement of goods and services and selection of consultants; administers consultant contracts executed under the Bank's technical assistance; reviews loan administration practices and procedures; and prepares guidelines, loan administration manuals, project administration instructions and other operational documents.

**client**

equivalent to employer.

**co-financing**

financing of a project by more than one financier. Broadly, there are two types of co-financing, namely *joint financing*, where all the funds are pooled, and *parallel financing*, where all contributions remain identifiable.

**COCS**

acronym for the Central Operations Consulting Services Division of the Bank. Sometimes also called CSD.

**commencement date**

the day on which the consultant starts work in accordance with the contract with the client. This can be either in the field or in home office.

**communication costs**

cost of mail, telephone, telefax, telex, etc. which will be paid/reimbursed under the contract or alternatively provided partially or totally free of charge by the client to the consultant.

**confidentiality of  
information**

information acquired by the consulting firm and its personnel in the course of the services and which is considered confidential and shall not be communicated to any person or entity except with the prior written consent of the client.

<b>conflict of interest</b>	a conflict of interest can exist if a consulting firm and its personnel engage in any activities, other than as consultant on the same project for which they provide consulting services, or on any future project which may emerge from a project for which the services were provided
<b>construction supervision</b>	the services provided by the consultant in overseeing, directing and managing the work of contractors during the construction phase.
<b>consultant</b>	an individual, firm, organization, entity etc. engaged to provide consulting services.
<b>Consultants Selection Committee (CSC)</b>	the committee which is responsible for the selection of consultants. For TA projects for which the Bank selects the consultants the members are the managers of COCS (chairman), the Programs Division handling the project country and the Project Division responsible for the technical aspects of the project.
<b>consulting firm</b>	partnership, incorporated company or other formally constituted group engaged in the provision of consulting services.
<b>Consulting Services Division</b>	the division in the Bank responsible for the recruitment of consultants as well as registration of consultants. Usually known as COCS, it is sometimes also called CSD.
<b>Consulting Services Specialist</b>	a professional staff in the Consulting Services Division.
<b>contingencies</b>	an amount (often 10-15 percent of the total cost of remuneration and out-of-pocket expenses) to be incorporated into the consultant's contract for the purpose of absorbing any added costs arising from adverse exchange rate variations and/or unforeseen expenditures during the implementation of the services. Use of the contingency is subject to prior approval of the client.
<b>contract</b>	the agreement between the client and the

	consultant defining the services for the assignment and the financial and other terms applicable.
<b>contract, sections/articles</b>	numbered parts of the contract referring to particular contract provisions.
<b>contract, termination of</b>	the act of bringing the consultant's services to a close in accordance with the conditions of the contract with the client.
<b>contract negotiations</b>	discussions between the parties (client & consultants) with a view to reaching agreement on the technical, financial and other terms for the assignment.
<b>contract amount</b>	the total sum of money (incl. contingencies) which the parties have agreed to cover the costs of the services. This sum is the ceiling which can only be exceeded if additional funds are made available by the client.
<b>COSO</b>	acronym for Central Operations Services Office of the Bank. COCS is a division of that office.
<b>cost estimates</b>	an approximate, but fairly accurate, calculation of the probable costs of the consultant's services.
<b>cost overrun</b>	costs which exceed the contract sum or any particular contract items.
<b>cost plus fee contract</b>	a contract which provides for agreed rates per time unit (including the fee) disbursed according to the time the consultant actually spends on an assignment. This is also referred to the remuneration part of the contract. In addition, other direct costs incurred in the contract are known as out-of-pocket expenses.
<b>counterpart facilities</b>	facilities such as office accommodation, transportation, equipment and other services which are normally provided to the consultant free of cost by the clients..

<b>counterpart staff</b>	staff members of the Executing Agency or a related Government department/ministry, assigned to work together with the consultant(s) on a project.
<b>criteria for evaluation</b>	factors to be considered in the evaluation of proposals and their relative importance (weight).
<b>criteria for shortlisting</b>	factors to be considered in the shortlisting of eligible consultants.
<b>CSC</b>	acronym for Consultants Selection Committee.
<b>currencies, foreign</b>	currencies of countries other than the project countries.
<b>currencies, local</b>	currencies of the project country.
<b>currency of payment</b>	currency in which the consultant is being paid which may be the currency of the consultant's home country or other currencies as agreed in the contract.
<b>CV</b>	acronym for Curriculum Vitae. See bio-data.
<b><u>D</u> DACON</b>	acronym for Data on Consultants. This is the computer roster used by the Bank to register consulting firms.
<b>date of arrival</b>	the date on which the consultant arrives in the field to commence fieldwork in accordance with the contract.
<b>Developing Member Country (DMC)</b>	A member country of the Bank to which the Bank may provide funds and technical assistance.
<b>DICON</b>	acronym for Data on Individual Consultants. This is the computer roster used by the Bank to register individual experts.



<b>direct costs</b>	Also known as out-of-pocket expenses incurred by the consultants for travel, per diem, communication, report production and other items related to the services and usually reimbursable against receipts or other documentation unless agreed otherwise in the contract.
<b>dispute, settlement of</b>	any dispute or difference arising out of the contract between the consultant and the client which cannot be amicably settled between the parties shall be settled in accordance with the clause in the contract which deals with the dispute resolution mechanism to be invoked. The Bank's model contract indicates that the dispute will be settled under the Rules of Conciliation and Arbitration of the International Chamber of Commerce.
<b>DMC</b>	acronym for Developing Member Country of the Bank.
<b>domestic consultant</b>	an expert who is a national of the project country, determined from the passport the expert holds.
<b>draft final report</b>	before the final report is prepared and submitted, the consultant prepares a draft which is discussed at a meeting between the parties so that possible comments can be incorporated in the final report.
<b>duty station</b>	the locality where the consultant will stay while engaged on a project services. This usually coincides with the project country.
<b><u>E</u> EA</b>	acronym for Executing Agency
<b>effective date</b>	the date on which a contract becomes effective, usually it is the date notice is given to the consultant to proceed with the services.
<b>employer</b>	the client, executing agency, project authority, or other institution which contracts for consulting services and to whom the consultant is directly responsible.

<b>engineering design</b>	the design and detailed drawings prepared by the consultant to be used during the implementation and construction of the project.
<b>environmental analysis</b>	an analysis of the environmental aspects of a project to ensure that precautions will be taken to appropriately protect the environment.
<b>environmental impact assessment (EIA)</b>	an assessment of the impact of a project on the physical environment and the culture of the region.
<b>equipment, hand over of</b>	the contract specifies the procedures to be followed by the consultant in respect of disposal of data and equipment upon completion or termination of the services.
<b>equipment, procurement of</b>	the clause in the contract which defines that part of the consulting services which deals with procurement. This is usually done by the consultant in accordance with the Bank's Guidelines for the Procurement of Goods and Services.
<b>evaluation work sheet</b>	a form used to record the rating and subsequent points allocation given to each component identified by the evaluation criteria and supported by the narrative explanation.
<b>Executing Agency (E.A.)</b>	Organization or authority in the project country responsible for administration and/or implementation of the project (usually a government entity).
<b>experience, previous</b>	the consultant's experience in performing services similar to those required for a particular project.
<b>experts</b>	individuals who are very skillful and trained in some special fields. The word is often used interchangeably with consultants.

<b>expressions of interest</b>	consultants' written registration of interest (normally in the form of a letter) in assisting a client by providing services for a particular project. Should contain information about the consultants' experience relevant to the input to be provided.
<b><u>F</u></b>	
<b>fact-finding</b>	obtaining detailed information on all aspects of a proposed project which is required to provide sufficient justification to proceed to the next stage of appraisal. This is undertaken by the fact-finding missions sent to the project countries by the Bank.
<b>feasibility study</b>	a study which may include preliminary designs, preliminary engineering, cost estimates, technical, financial, economic and socio-economic analysis for the purpose of assisting in the preparation of a project for financing by the Bank.
<b>fee</b>	One of the cost components in consultants' billing rates, representing the profit margin of the consultant. Also known as profit.
<b>field</b>	work area outside of the consultant's home office.
<b>field rate per month</b>	the amount paid to the consulting firm by the client for every month a consultant is working in the field on the project.
<b>final report</b>	usually the last report the consultant is required to submit to the client upon completion of services in accordance with the contract taking into consideration the comments on the draft final report.
<b>financial analysis</b>	a quantitative and qualitative examination to determine the reliability of the financial data pertaining to a project.

<b>financial institutions</b>	organizations which are established to provide funds and technical assistance to developing countries and to promote investment and foster economic growth.
<b>financial proposal</b>	the proposal the consultant has to prepare and submit to the client if selected on basis of the clients evaluation of the technical proposals. The financial proposal specifies the cost elements which in the opinion of the consultant are necessary to undertake the services. It is reviewed during contract negotiations.
<b>financial terms</b>	the terms agreed on during contract negotiations between the consultant and the client in respect of the cost of the services to be provided by the consultant. These agreed terms will be stated in the contract between the parties.
<b>fixed sum</b>	fixed amount negotiated for specific outputs. Equivalent to lump sum.
<b>force majeure</b>	the term “force majeure” usually means acts of God, strikes, lock-outs or other industrial disturbances, acts of the public enemy, wars, blockades, insurrection, riots, epidemics, landslides, earthquakes, storms, lightning, floods, washouts, civil disturbances, explosions, and any other similar events, not within the control of either party to the contract and which by the exercise of due diligence neither party is able to avoid.
<b>foreign currency expenditure</b>	costs incurred in currencies other than that of the project country.
<b>funding source</b>	lending agency, bilateral or multilateral financing institution, bank, government, departmental or ministerial budget which will provide the funds needed to finance a project or parts thereof.

## **G**

### **General Conditions of Contract**

sections and clauses of a contract which are standard for that model contract and which usually should not be modified.

### **geographical representation**

the Bank Guidelines on the Use of Consultant's requires that firms included on the short list must represent Bank's member countries in a reasonably geographically balanced manner.

### **Government**

the government of the project (recipient) country.

### **grant funds**

funds provided by a financier on a grant basis, i. e. that do not have to be paid back by the receiver.

### **Guidelines**

Guidelines on the Use of Consultants by the Asian Development Bank and its Borrowers.

## **H**

### **home office**

the office of the consultant in its home country.

### **home office rate per month**

the amount paid to the consulting firm by the client for every month a consultant is working in the home office on the project.

## **I**

### **implementation**

the process of carrying out the work.

### **inception report**

usually the first report submitted by the consultant four to six weeks after commencement of the services.

### **income statement**

the consulting firm's annual statement of income and expenditure which the Bank requires the selected consulting firm to present during contract negotiations.

<b>individual consultants</b>	persons offering consulting services as self-employed experts. Individual consultants may also be recruited through consulting firms.
<b>individual contract</b>	contract entered into by an individual consultant.
<b>input</b>	the time spent by a particular expert in providing services under a contract.
<b>institutional strengthening</b>	assistance in improving technical, managerial and financial capabilities of recipient agencies.
<b>insurance</b>	systems whereby the consultant protects the client against losses. The coverage will usually be specified in the contract between the parties.
<b>insurance, professional indemnity</b>	the insurance the consultant has to take out, and maintain during the performance of the services, to remedy any loss or damage that occurs due to the consultant's failure to fulfill its responsibility in respect of the professional input.
<b>interim report</b>	a report presented at the conclusion of a phase of a project. It would normally fully summarize the work done to date and propose a program for the ensuing phase.
<b>invitation documents</b>	the documents sent to short-listed consultants requesting that technical proposals be submitted by a specific date. The documents usually comprise an invitation letter, background information, terms of reference, various formats required by the client to be used by the consultant when submitting proposal, a list of suitable domestic consultants (if appropriate) and the Bank's Guidelines on the Use of Consultants.

## **J**

<b>joint ventures</b>	associations (groups) of consultants with complementary skills.
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## **K**

### **key issues**

most important topics or matters to be discussed or decided on.

## **L**

### **lead firm**

a consulting firm which is leading a project in association with other firms.

### **letter of authority**

a document issued by a client to a person giving that person the power or right to make decisions or to take action on behalf of the client.

### **letter of invitation (LOI)**

Part of a package of invitation documents outlining the conditions under which shortlisted consultants are invited to submit proposals.

### **loan funds**

funds provided by the Bank under a loan to finance a project in a DMC.

### **local consultants**

equivalent to domestic consultants.

### **local currency**

see currencies, local

### **LOI**

acronym for letter of invitation.

### **long list**

an initial listing of suitable consulting firms which may be considered for a specific assignment. They all have expertise and working experience relevant to that required for the assignment.

### **lump sum contract**

a contract for which a fixed amount is negotiated with payment by installment against deliverables submitted by the consultant.

## **M**

### **management**

the act of handling, controlling, directing etc. for instance a project or company. Or the person or persons undertaking that act. Also a term used to describe the President and Vice Presidents of the Bank.

<b>manmonth</b>	the Bank prefers to use “person-month”.
<b>manning schedule</b>	the Bank prefers to use “personnel schedule” or “staffing schedule”.
<b>maximum payment</b>	equivalent to maximum contract amount.
<b>member countries</b>	all countries which are members of the Bank and thereby have subscribed to the Bank’s capital stock. Member countries of the Bank are found in the website at: <a href="http://www.adb.org/About/members.asp">http://www.adb.org/About/members.asp</a>
<b>memorandum of understanding (MOU)</b>	a tentative or preliminary agreement on the objectives and achievement of a planned project.
<b>minutes of negotiations</b>	a detailed record of topics discussed and the agreements reached during contract negotiations.
<b>mobilization</b>	the preparation of the consultant’s team just prior to the fielding of services.
<b>mode of travel</b>	the method and the class of transportation and the travel route.
<b>multiplier</b>	the factor with which the basic monthly salary is multiplied in order to arrive at the remuneration rate per month (applies to both home and field remuneration).
<b><u>N</u> negotiations (by fax)</b>	contract negotiations with consultants for small and very straight forward projects are often conducted by fax rather than face-to-face.
<b>negotiations (face-to-face)</b>	in most cases the selected consultant is invited to travel to the client’s country to negotiate the contract face-to-face.
<b>non complying</b>	an action taken which is not in accordance with a request, order, rule etc., such as when the consultant has undertaken work not in accordance with the terms of the contract.



<b>notice to proceed</b>	the client's instruction to the consultant to mobilize and commence services in accordance with the contract. The consultant should not start work until such notice is received.
<b><u>O</u></b>	
<b>objectives</b>	aims or goals to be achieved by the project
<b>obligations</b>	duties legally imposed on the parties in accordance with the contract.
<b>observer</b>	a third party present during contract negotiations assisting the negotiating parties in reaching an agreement. For TAs, this is usually a representative of the Executing Agency and for loan contract negotiations a representative of the Bank.
<b>office consumables</b>	items such as stationery and office supplies, etc. used by the consultants during the performance of their services in the field. .
<b>office facilities</b>	the office space together with office equipment required by the consultant to undertake the services. Usually provided free of charge by the client.
<b>one-envelope system</b>	see two-envelope system

<b>organizational chart</b>	a diagram showing the relationship between the Bank, the Executing Agency and the Consultant..
<b>other allowances</b>	usually contractually agreed payments made by the consulting firm to the experts during their overseas work, such as overseas allowance, team leadership, etc.
<b>out-of-pocket expenses</b>	the costs incurred by the consultant besides remuneration such as travel costs, per diem, communication cost, and any incidental expenses related to the project.
<b>output</b>	the results or deliverables expected from the completion of a project or of consulting services.
<b>overhead</b>	a cost component in consultant's billing rates; usually the cost of business operation excluding professional salaries, social charges, and fee.
<b>overseas allowance</b>	a contractual agreed inducement paid by some consulting firms to staff assigned for long periods of time away from their home office.
<b>ownership of reports</b>	reports prepared by the consultant during the performance of the services in accordance with the contract are the property of the client.
<b><u>P</u> parties</b>	the persons or representatives who participate in or are concerned with contractual matters between the consultant and the client.
<b>payment schedule</b>	a list of deliverables against which the consultant is paid. This schedule is usually part of appendix C to the consultants' contracts.
<b>per diem</b>	a fixed amount paid for every day experts are away from their home office whilst working on the project. It covers a subsistence allowance and accommodation cost of the experts.

<b>permanent full-time employee</b>	an expert hired by a firm to work full-time for that firm for at least 12 months.
<b>personmonth</b>	every month during which an expert is working on a project.
<b>personnel</b>	the experts in the consultant's team specified in the contract.
<b>personnel (replacement)</b>	only in few cases and with a very good justification will the client accept a replacement of an expert previously approved.
<b>personnel schedule</b>	equivalent to staffing schedule.
<b>phasing of work</b>	dividing the consultant's input into stages. Usually one stage has to be completed and the output accepted by the client before work can proceed to the next stage.
<b>PPTA</b>	acronym for Project Preparation Technical Assistance..
<b>profit</b>	the fee paid on the remuneration of experts. Normally no fee or administrative charges are payable on out-of-pocket expenses.
<b>progress payment</b>	payment linked to an output such as submittal by the consultant of certain reports. See payment schedule. This type of payment is adopted by the Bank for TA contracts with consulting firms.
<b>project</b>	can refer to (i) the subject of a consultant's assignment, or (ii) the facility or activity to which the consultant's services are related. Thus, the "project" could be a feasibility study, engineering design, advisory service, training activity or completion reviews; or, alternatively, roads, schools, agricultural equipment, a dam, a highway maintenance program, rural development, etc.
<b>project advisor</b>	a consultant engaged to provide guidance and support during the implementation of a project.

<b>project coordinator</b>	an officer or staff member in the employer's organization or hired by that organization to provide liaison and support for the administrative and organizational aspects of a project.
<b>project country</b>	the country in which the project is situated. Also called recipient country.
<b>Project Division</b>	the user Division of the Bank responsible for specific projects.
<b>Project Manager</b>	the employer's or executing agency's designated representative (usually a permanent staff member) responsible for supervising the project and for dealing with the consultant's team leader and the funding source.
<b>Project Officer</b>	the staff in the Bank being in charge of handling a specific project.
<b>project preparation</b>	usually a feasibility study undertaken by a consultant to bring a project to the stage of being ready for investment financing.
<b>Project Preparation TA (PPTA)</b>	The Bank's assistance to the recipient country in the preparation of a project to bring it to the stage of being ready for Bank consideration for financing.
<b>project site</b>	the location where the project is to take place.
<b>project sponsor</b>	unit or agency which undertakes the initial tasks of identifying a project and defining its potential consultant needs. The project sponsor may or may not subsequently assume the role of executing agency.

<b><u>Q</u> qualifications</b>	the experience and expertise of consultants relevant for a particular assignment.
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<b>quota</b>	application of the number of shortlists/submission of technical proposals allowed in a calendar year (see shortlisting quota)
<b><u>R</u></b>	
<b>ranking</b>	the order of merit (i.e. 1, 2, 3 etc) of consultants' technical proposals based on their evaluation by the Consulting Selection Committee.
<b>records</b>	anything that is written down and preserved as evidence.
<b>receiptable expenses</b>	items in the cost estimates of the contract which have to be substantiated by the consultant by submission of receipts, evidence of payment, etc. Also known as reimbursable expenses.
<b>Regional TA (RETA)</b>	Technical assistance provided for sectoral studies, surveys and training covering a group of DMCs in a region, i.e., taking place in more than one country.
<b>registration</b>	a consulting firm's inclusion in the Bank's DACON or an individual consultant's inclusion in the Bank's DICON.
<b>remuneration</b>	Equivalent to an expert's monthly or daily rate payable to the consultant. The rate consist of basic salary, social charges, overhead and fee and if applicable other allowances.
<b>report</b>	a presentation of the findings of the consultant during the performance of the services with recommendations and conclusions made on basis of such findings.
<b>reporting requirements</b>	the client's requirement, as usually expressed in the TOR, for the number and timing of reports to be submitted by the consultant during the performance of the services as well as the outline of the content of each of these reports.
<b>request for proposal (RFP)</b>	Equivalent to letter of invitation.

**RETA**

acronym for Regional Technical Assistance.

## **S**

### **salary**

usually used as an equivalent to basic monthly salary.

### **scope of services**

the task descriptions in the consultant's terms of reference.

### **sectors**

distinct development activities for which the Bank provides financing i.e. agriculture sector, power sector, road sector etc.

### **selection**

part of the recruitment process, including the preparation of a long-list and short-list of consultants and the evaluation and ranking of proposals, to choose the first ranked proposal.

### **selection committee**

refers to the Consultants Selection Committee (CSC).

### **seminars**

courses which the Bank or consultant's organize and conduct covering various topics related to Bank activities or a particular project. It could be for Bank staff, for Executing Agency's staff or for consultants.

### **services**

professional work performed for a client under a consultant's contract.

### **shortlist**

a list of five to seven firms, derived from a long list, considered to be among the most technically qualified and suitable to be invited to submit proposals for a particular assignment. The shortlist is prepared by the Consultant Selection Committee.

<b>shortlisting quota</b>	a quota system by which in any calendar year, a firm/organization can submit technical proposal only three times for TA projects with budget superior to US\$400,000 (on the basis of shortlisting date). Note that firms which decline submissions would not be counted against the quota.
<b>sick leave</b>	the period of time during which an expert is sick and for which the firm does not receive payment for that expert. To compensate the firm for the costs covering sick leave a certain percentage of the basic monthly salary is included in the social charges component of the remuneration.
<b>Simplified Technical Proposal (STP)</b>	a proposal which contains only the biodata of nominated experts and a limited description of approach and methodology. Usually used by the Bank for contracts where the required methodology is stated clearly in the TOR and the TOR define in detail all the tasks to be undertaken by experts in the consultant's team.
<b>social analysis</b>	analysis of the social aspects of a project.
<b>social charges</b>	specific employee benefits such as paid vacation, contributions to pension funds, insurance, and similar costs directly attributable to the employee. A component of the remuneration.
<b>social charges, breakdown</b>	a presentation of the components of the total social charges percentage representing the social charges for each expert. Each component is expressed as a percentage of the total basic salaries of professional staff paid by a firm annually.
<b>specific assurance of the Government</b>	guarantee from the Government that it will provide assistance to the consultant in specified areas such as office accommodation, local transportation, access to reports and documents etc.
<b>staff consultant</b>	individual expert hired by the Bank to complement or supplement its own staff for



missions, or as a resource within the Bank to undertake work under the direction and supervision of regular staff.

**staffing schedule**

a bar chart showing the estimated duration (separately for home office and field) and the probable timing of the assignment of each expert to be used (both foreign and domestic). Also called Personnel Schedule.

**Steering Committee**

a small group of key officials from government agencies having principal interest in the project (usually chaired by a senior official), to oversee and provide guidance during the course of project implementation.

<b>STP</b>	acronym for simplified technical proposal.
<b>subconsultant</b>	a consultant (firm or individual) hired by the lead consultant to supplement the team for a particular project.
<b>subcontract</b>	a contract to provide part of the work required of the contractor.
<b>supporting documents</b>	information submitted by the consultant to substantiate certain elements of the financial proposal presented at contract negotiations.
<b>suspension of services</b>	a temporary stoppage of the consultant's services usually caused by of a force majeure situation or the client's inability to provide the agreed input or some other reasons stipulated in the contract.
<b><u>T</u> TA</b>	acronym for Technical Assistance.
<b>TA Agreement</b>	the paper signed by the Bank and the Recipient of the TA stating the obligations and responsibilities of both parties.
<b>TA budget</b>	the amount approved by the for a particular TA.
<b>TA Framework Agreement</b>	An umbrella TA agreement signed by a member country which applies to all TAs to be implemented in that country.
<b>team leader</b>	the manager of a team of experts responsible, on behalf of the consultant, for controlling and directing the services and for liaison with the client.
<b>Technical Assistance (TA)</b>	Assistance provided by the Bank to help DMCs identify, design, implement and operate development projects and to strengthen their ability to formulate strategies, policies, programs and plans. (See PPTA, ADTA and RETA)

<b>Technical proposal</b>	a detailed submission made by a consulting firm, providing information on the firm's experience, its explanation as to how it will provide the required services, and details of personnel to be assigned to the project.
<b>termination of contract</b>	to bring to a close the consultant's services, either party can terminate the contract which includes clauses stipulating how and under which circumstances it can be terminated.
<b>terms of reference (TOR)</b>	The client's instructions to the consultant describing the services required to complete a specific assignment.
<b>time frame</b>	the time required by the consultant to complete a specific assignment.
<b>TOR</b>	acronym for terms of reference.
<b>travel time</b>	time spent by the consultant traveling from the consultant's home country to the project country/site.
<b>two-envelope system</b>	a procedure which requires the invited consultants to submit both technical and financial proposals at the same time. The financial proposal must be in a sealed envelope. A technical evaluation is made and the first-ranked firm is invited for contract negotiations; the financial envelope of this firm <b>only</b> is opened in the presence of the firm. If negotiations are successful, all the other financial envelopes are returned <b>unopened</b> . If negotiations fail and are consequently terminated with the first-ranked firm, the procedure is repeated with the second-ranked firm, and so on, until an agreement is concluded. This system is usually used under loan projects but not in TA projects.
<b><u>U</u> unsatisfactory performance</b>	the fact that the consultant has not worked to the satisfaction of the client.

<b>user</b>	equivalent to employer/client.
<b>user Division</b>	the Division of the Bank which requires the services of consultant(s).
<b><u>V</u></b>	
<b>vacation leave</b>	the time spent by the experts away from work. Usually firms grant the employees a certain period of time per annum for vacation and the cost is part of the social charges included in the remuneration rate. The same applies to sick leave or public holidays.
<b>variations</b>	changes or amendments to the contract during project implementation. Variations are mostly caused by the actual situations encountered some of which turn out to be different from those on which the contract is based.
<b>visit to field (site visit)</b>	the consultant's official inspection, investigation etc. in the project area. Prior to preparation of technical proposal.
<b><u>W</u></b>	
<b>weight (for selection factors)</b>	the importance (measured in points) given by the employer to a specific category, section or aspect of consultants' proposals in the evaluation process. In the evaluation sheet each item to be evaluated is allocated a maximum number of points the sum of which is usually set as 1000 in the Bank's procedure.
<b>work program</b>	a program of tasks or actions with listing of the time required or estimated for the completion of each.
<b>workshops</b>	seminars or series of meetings for intensive study, work, discussion etc. in various fields related to the Bank's activities or a particularly project/study being undertaken by a consultant.