



Technical Assistance Report

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Knowledge and Support Technical Assistance (KSTA)
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Islamic Republic of Pakistan: Supporting Economic Corridor Development through Strategic Planning Frameworks (Financed by the Government of the United Kingdom)

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Asian Development Bank

CURRENCY EQUIVALENTS

(as of 23 November 2017)

Currency unit	–	Pakistan rupee/s (PRe/PRs)
PRe1.00	=	\$0.0095
\$1.00	=	PRs105.375

ABBREVIATIONS

ADB	–	Asian Development Bank
CAREC	–	Central Asia Regional Economic Cooperation
CPEC	–	China–Pakistan Economic Corridor
DFID	–	Department for International Development of the Government of the United Kingdom
ECD	–	economic corridor development
GDP	–	gross domestic product
TA	–	technical assistance

NOTES

- (i) The fiscal year (FY) of the Government of Pakistan ends on 30 June. “FY” before a calendar year denotes the year in which the fiscal year ends, e.g., FY2018 ends on 30 June 2018.
- (ii) In this report, “\$” refers to United States dollars.

Vice-President	Wencai Zhang, Operations 1
Director General	Sean O’ Sullivan, Central and West Asia Department, CWRD
Director	Xiaohong Yang, Pakistan Resident Mission (PRM), CWRD
Team leader	Guntur Sugiyarto, Principal Economist, PRM, CWRD
Team members	Khadija Ali, Associate Operations Analyst, PRM, CWRD Farzana Noshab, Senior Economics Officer, PRM, CWRD Nasrminullah Mian, Senior Program Officer, PRM, CWRD Guan Wan, Principal Economist, Economic Research and Regional Cooperation Department, (ERCD) Yi Jiang, Senior Economist, ERCD Shauzab Ali, Senior Project Officer (Financial Sector), PRM, CWRD Ahsan Tayyab, Principal Natural Resources Economist, CWRD Edward Faber, Investment Specialist, Private Sector Operations Department Aysha Qadir, Principal Counsel, Office of the General Counsel

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KNOWLEDGE AND SUPPORT TECHNICAL ASSISTANCE AT A GLANCE

1. Basic Data		Project Number: 51224-001	
Project Name	Supporting Economic Corridor Development through Strategic Planning Frameworks	Department /Division	CWRD/PRM
Nature of Activity	Research and Development	Executing Agency	Ministry of Planning, Development and Reform
Modality	Regular		
Country	Pakistan		
2. Sector	Subsector(s)	ADB Financing (\$ million)	
		Total	0.00
3. Strategic Agenda	Subcomponents	Climate Change Information	
Inclusive economic growth (IEG)	Pillar 1: Economic opportunities, including jobs, created and expanded	Climate Change impact on the Project	Low
Regional integration (RCI)	Pillar 1: Cross-border infrastructure Pillar 2: Trade and investment Pillar 4: Other regional public goods		
4. Drivers of Change	Components	Gender Equity and Mainstreaming	
Governance and capacity development (GCD)	Institutional systems and political economy	No gender elements (NGE)	✓
Knowledge solutions (KNS)	Organizational development Application and use of new knowledge solutions in key operational areas Knowledge sharing activities Pilot-testing innovation and learning		
Partnerships (PAR)	Bilateral institutions (not client government) Civil society organizations Implementation Official cofinancing Private Sector Regional organizations United Nations organization		
Private sector development (PSD)	Conducive policy and institutional environment Promotion of private sector investment		
5. Poverty and SDG Targeting		Location Impact	
Geographic Targeting	No	Not Applicable	
Household Targeting	No		
SDG Targeting	Yes		
SDG Goals	SDG1, SDG8, SDG9, SDG11, SDG17		
6. Risk Categorization	Low		
7. Safeguard Categorization	Safeguard Policy Statement does not apply		
8. Financing			
Modality and Sources		Amount (\$ million)	
ADB		0.00	
None		0.00	
Cofinancing		2.42	
Government of the United Kingdom (Full ADB Administration)		2.42	
Counterpart		0.00	
None		0.00	
Total		2.42	

I. INTRODUCTION

1. During the 2017 Asian Development Bank (ADB) country programming mission to Pakistan, the Government of Pakistan requested that ADB provide knowledge and support technical assistance (TA) to the Ministry of Planning, Development and Reform for preparing the Twelfth Five-Year Plan, which focuses on promoting efficient growth and connectivity, including through economic corridor development (ECD).¹ ADB and the government initially agreed on (i) the TA objective of helping the government with ECD to achieve sustained and inclusive growth, and (ii) key areas to be covered by the TA: (a) an ECD policy and operational framework to support Pakistan's participation in global value chains and enhance its competitiveness;² and (b) analytical tools and feasibility studies for ECD identification, design, and implementation.³ In the follow-up meetings between the government and ADB, the government reaffirmed the key areas of focus and suggested the need for additional assistance regarding industrial policy, special economic zones, and an ECD hub for knowledge generation and sharing. It was agreed that ADB will draw on its internal expertise and resources to address these challenges.

2. The TA will contribute to the key knowledge products of the ADB Pakistan Resident Mission to support overall ADB operations in Pakistan, as described in the ADB country partnership strategy for Pakistan, 2015–2019, with the objective of achieving higher and more inclusive growth.⁴ The TA is included in the ADB country operations business plan for Pakistan, 2018–2020 as a follow-up to a small-scale policy and advisory TA project for Scoping Potential Economic Corridors in Pakistan,⁵ and will support development of the subsequent ADB country partnership strategy for Pakistan (for 2020–2024) and country operations business plans. The TA is part of the Pakistan Economic Corridors Programme—financed by the Department for International Development of the Government of the United Kingdom (DFID) and jointly delivered by ADB and DFID—to promote regional trade and connectivity.

II. ISSUES

3. Pakistan has experienced steady growth recovery in 2015–2017, with gross domestic product (GDP) growth of 5.3% in FY2016. Although very encouraging, the growth remains modest and insufficient to create jobs for the large number of youth (about 3 million) joining the labor force each year, and far below the growth path that some countries have followed in becoming strong middle-income countries. Stronger growth is also essential to further reduce poverty and improve the lives of the poor, who number about 60 million. The government's long-term development goal, as reflected in its Pakistan Vision 2025, is to achieve upper middle-income status by increasing per capita income to \$4,200 by 2025, from the current level of about \$1,600.⁶ Achieving this goal requires higher, more sustained, and inclusive economic growth of at least 7% per year.

4. Pakistan's increased growth in FY2016 was mainly driven by consumption, with a continued low level of investment⁷ caused by perceived security issues, energy shortages, and a

¹ ADB first used the term “economic corridor” in 1998 to describe a planned development in a given space; the concept emerged in the early 1990s via ADB's Greater Mekong Subregion project and Europe's Maastricht Treaty.

² An economic corridor involves the creation of an efficient multimodal transport network within a defined area, supported by quality infrastructure and logistics, and with a policy framework that facilitates doing business. It includes setting up distribution networks that link production centers, urban clusters, and international gateways.

³ The TA first appeared in the business opportunities section of ADB's website on 27 November 2017.

⁴ ADB. 2014. *Country Partnership Strategy: Pakistan, 2015–2019*. Manila.

⁵ ADB. 2017. *Country Operations Business Plan: Pakistan, 2018–2020*. Manila; ADB. Pakistan. Economic Corridor Program (Planning).

⁶ Government of Pakistan, Ministry of Planning, Development and Reform. *Pakistan Vision 2025*. Islamabad.

⁷ The ratio of investment to GDP is 15.6%, compared with the average of 34% for South Asia during 2010–2015.

poor business regulatory environment.⁸ Growth acceleration needs a better alignment between national plans and policies and provincial operational priorities, and joint actions between federal and provincial governments. All sectors should benefit from ECD that improves infrastructure, the business climate, and investment. ECD is more than special economic zones, export processing zones, and industrial parks, for it includes the infrastructure, industrial and urban developments to connect producers and consumers by providing good economic networks. ECD is a well-proven growth instrument that could move Pakistan into a higher growth trajectory. Empirical evidence across countries supports the positive impact of ECD.⁹

5. Declining exports also pose a development challenge. Pakistan has lost 1.45% in export market share per year in 2007–2017 due to weakening export competitiveness and soft global demand in key sectors. Food and textiles remain Pakistan's main exports, but they continue to suffer from declining prices and demand, as well as from poor trade facilitation, inadequate investment, low diversification, inefficient logistics, and poor investment climate. Pakistan has also lagged behind its competitors in terms of trade openness. For example, the simple average tariff has fallen only slightly, from 14.4% in FY2013 to 13.4% in FY2016. Moreover, 80% of global trade is currently carried out through global value chains. Therefore, it is vital for Pakistan to improve its trade competitiveness.

6. ECD has contributed to and been influenced by regional and global trades and market integration. ECD expansion in Asia in the last few years was driven by rapid increases in global value chains. Successful ECD is therefore contingent upon investments and policy incentives. ECD and trade facilitation are important in Pakistan, as the country has concern on export and its subsequent impacts on foreign reserves. Reforms in policy, institutional mechanisms, and incentives are needed to remove FDI bottlenecks and facilitate private sector investment to promote productivity, trade and further ECD.

7. At the regional and global levels, Pakistan is actively participating in Central Asia Regional Economic Cooperation (CAREC) program and the Belt and Road Initiative (BRI),¹⁰ in which the China–Pakistan Economic Corridor (CPEC) is the central project. Both the CAREC and CPEC projects provide a strong foundation for ECD in Pakistan by providing regional and international economic linkages that would have otherwise be developed by Pakistan.

8. The TA aims to assist Pakistan to realize the potential of ECD to boost industrial productivity, exports, and job creation and thereby contribute to sustained, increased and equitable economic growth. The key focus of the TA is to (i) further study the corridors to be included in the TA scope; (ii) enhance the value chain development program along the corridors; and (iii) strengthen strategies and strategic frameworks, policies, institutions, and coordination for ECD, including by promoting the role of the private sector, strengthening capacity, and learning from best practices. The TA will examine efficient connections between domestic and international production networks and markets, domestic connectivity to connect lagging districts (including secondary cities and rural areas) with urban growth poles to unleash growth potential by increasing trade competitiveness, reducing poverty, and strengthening Pakistan's regional and global competitiveness.

⁸ Pakistan ranks 147th out of 190 countries in the World Bank's ease of doing business survey. World Bank. Doing Business—Economy Rankings. (Accessed 20 November 2017).

⁹ Asian Development Bank. 2016. *Scaling New Heights: Vizag–Chennai Industrial Corridor, India's First Coastal Corridor*. Manila.

¹⁰ CAREC has corridors to connect Pakistan with other Central Asian economies. An estimated \$62 billion CPEC investment (as part of its Belt and Road initiative) is targeted to connect the western part of PRC with the Gwadar port of Pakistan for direct and better access to the Middle East, Africa, and beyond.

III. THE TECHNICAL ASSISTANCE

A. Impact and Outcome

9. The TA is aligned with the following impacts: more integrated economic development resulting in better resource allocation, and higher and more inclusive growth in line with the government's growth aspirations and Pakistan Vision 2025. The TA will have the following outcome: better planned ECD resulting in more investments and increased economic activity. The design and monitoring framework is in Appendix 1. The TA will help address the following basic problems: (i) a lack of synergy in development policies and programs across districts and provinces; (ii) institutional, policy, and governance inefficiencies; (iii) lack of implementation plans; and (iv) poor trade competitiveness and facilitation. The TA will help address lagging and fragmented economic development across sectors, districts and provinces and a lack of connection with global trade and production networks to increase Pakistan's competitiveness, exports, GDP, and productivity.

B. Outputs, Methods, and Activities

10. **Output 1: Economic corridor development policy and operational framework developed in line with best practice.** Regional and global best practices will be tailored to fit the Pakistan context. ECD requires supportive institutional and regulatory frameworks conducive to entrepreneurship and private investment. Under output 1, the TA will (i) collect international best practices and successful modes and case studies;¹¹ (ii) prepare tangible models of ECD planning, development, financing, management, and operations; (iii) undertake a detailed diagnosis for ECD in Pakistan;¹² and (iv) develop an integrated institutional, policy, and regulatory framework for ECD.

11. **Output 2: Economic corridor development feasibility studies and analytical tools developed.** The feasibility studies will demonstrate the application of best practices and establish a benchmark for key ECD components, including assessments of demand for targeted industries; analyses on industrial land market price and land pricing strategy; the suitability of an area to support targeted industries with the required infrastructure and amenities; a financial model of costs and revenue streams with a sensitivity analysis; and economic impact analyses on job creation, export demand, and other benefits. Moreover, a user-friendly analytical tool¹³ will be developed to support better planning and prioritization, provide scenario analyses, determine optimum locations, and trace likely impacts across districts and industries.

12. **Output 3: Pakistan economic corridor development hub developed.** The hub is a professional network to facilitate ECD knowledge generation and dissemination to tap the best experts and latest knowledge for capacity building and decision-making. The virtual hub and ECD network will build linkages among the government, businesses, and think tanks.¹⁴

¹¹ Special focus would be on Malaysia, PRC and others, such as in the Greater Mekong Subregion.

¹² Includes land use regulations, policies for investment-friendly and efficient provision of labor and capital, utilities, a streamlined tax system, simplified business procedures, and other investment and business facilitation programs.

¹³ Such as the webGIS (geographic information system) application.

¹⁴ Including the Ministry of Planning, Development and Reform; Board of Investment; Ministry of Industries and Production; Ministry of Commerce; Ministry of Finance; Ministry of Water and Power; Ministry of Petroleum and Natural Resources; Ministry of Communications; provincial governments of Punjab, Khyber Pakhtunkhwa, Sindh, and Baluchistan; and the National Industrial Parks Development and Management Company.

13. **Output 4: Strategic policy framework for improving trade competitiveness developed.** Trade competitiveness is a fundamental driver of economic growth and increased competitiveness will likely result in more rapid economic growth. To develop the framework, the TA will identify and address key policy gaps hampering Pakistan’s domestic and international competitiveness by examining 12 factors that affect Pakistan’s productivity and economic prosperity: institutions, infrastructure, macroeconomic environment, health and primary education, higher education and training, market efficiency for goods and labor, financial market development, technological readiness, market size, business sophistication, and innovation.¹⁵

14. **Methodology and key activities.** The TA will consult key stakeholders, do some assessments and analyses, conduct research studies and develop (i) ECD policy and operational framework, (ii) ECD feasibility studies and analytical tools, (iii) Pakistan ECD hub, and (iv) strategic policy framework for improving trade competitiveness. Domestic field research could include visits to more advanced and developed provinces, and policy dialogue. International field research could include visits to countries with rich experience in ECD. Specifics regarding these visits would depend on research requirements, with preference given to ADB member countries. Moreover, seminars with press conference by involving policy makers and renowned experts from relevant countries, could be conducted to help share international experience and TA results.

C. Cost and Financing

15. The TA is estimated to cost \$2,418,081, all of which will be financed on a grant basis by DFID of the Government of the United Kingdom. ADB will administer the TA. The government will provide counterpart support in the forms of counterpart staff, office accommodation, office supplies, relevant data and information, assistance in arranging meetings and field visits with relevant government agencies, logistics support, and other in-kind contributions that are estimated about not more than 15% of the total cost. Key expenditure items are in Appendix 2.

D. Implementation Arrangements

16. The executing agency will be the Ministry of Planning, Development and Reform, which will also serve as the implementing agency for output 1; implementing agencies for the other outputs will be the Punjab’s Urban Unit (output 2), selected think tanks (output 3) and the Ministry of Commerce (output 4). The implementation arrangement is summarized in Table 1.

17. The TA will be conducted in 30 months. Priority for field research will be given to potential economic corridors already identified and discussed with the government.¹⁶ Expertise and resources from across ADB will be tapped to work as “One ADB”, with departments working together to examine key issues relating to ECD.

18. **Consulting services.** A total of 44 person-months of individual consulting services (two international consultants for 14 person-months and three national consultants for 30 person-months) will be provided using lumpsum output-based contracts. International and/or local firms will be mobilized to mainly carry out feasibility studies on ECD, developing analytical tools, and establishing ECD Hub. It is important that the TA be implemented in a flexible manner. Therefore, the TORs, duration, and schedule of TA inputs will be adjusted as necessary. Such adjustments may also be undertaken during implementation to better meet capacity building needs and to

¹⁵ World Economic Forum. The Global Competitiveness Report 2014–2015. Methodology: The 12 pillars of competitiveness.

¹⁶ This includes the nine special economic zones and four potential economic corridors in Faisalabad, Multan, Abbottabad, and Lahore identified through the Scoping Potential Economic Corridors in Pakistan TA (footnote 5).

ensure TA funds are utilized in a cost-effective manner. ADB will engage individual consultants in accordance with ADB Procurement Policy (2017, as amended from time to time) and the associated PAIs/TA Staff Instructions.

19. The TA will work with local and international think tanks selected based on their ability and technical know-how, implementation capability, and efficiency to generate and promote knowledge solutions on ECD.¹⁷ The TA will also engage resource persons to review the accuracy and quality of the reports, provide international perspectives, bring in up-to-date knowledge, and present at the related workshops. The resource persons include an economics editor to refine the reports, research assistants to help conduct surveys and field research, and experts on trade and other ECD related issues to provide inputs. The number of resource persons and their person-months will be determined during TA implementation. Outline Terms of Reference for firms, individual consultants and resource persons are in Appendix 3.

Table 1: Implementation Arrangements

Aspects	Arrangements		
Indicative implementation period	January 2018–June 2020		
Executing agency	Ministry of Planning, Development and Reform		
Implementing agencies	Output 1: Ministry of Planning, Development and Reform Output 2: Punjab's Urban Unit Output 3: Think tanks/firms Output 4: Ministry of Commerce		
Consultants	To be selected and engaged by the Asian Development Bank		
	International consultants (individual consultant selection)	14 person-months	\$280,000.0
	National consultants (individual consultant selection)	30 person-months	\$180,000.0
	Firms through QCBS (90:10)		\$600,000.0
Disbursement	The TA will be disbursed in line with the Asian Development Bank's <i>Technical Assistance Disbursement Handbook</i> (2010, as amended from time to time).		

Source: Asian Development Bank estimates.

IV. THE PRESIDENT'S DECISION

20. The President, acting under the authority delegated by the Board, has approved the Asian Development Bank administering technical assistance not exceeding the equivalent of \$2,418,081 to the Government of Pakistan to be financed on a grant basis by the Department for International Development of the Government of the United Kingdom for Supporting Economic Corridor Development through Strategic Planning Frameworks, and hereby reports this action to the Board.

¹⁷ Given the complex nature of ECD, it is critical to collaborate with the think tanks to ensure for successful implementation of ECD.

DESIGN AND MONITORING FRAMEWORK

Impacts the TA is Aligned with More integrated economic development resulting in better resource allocation, and higher and more inclusive growth in line with the government's growth aspirations and the Pakistan Vision 2025 ^a			
Results Chain	Performance Indicators with Targets and Baselines	Data Sources and Reporting Mechanisms	Risks
Outcome Better planned ECD resulting in improved resource allocations and increased economic activity.	By 2020: a. Increased and more integrated planning and investments (2017 baseline: Not applicable) b. Adoption of TA results (2017 baseline: 0)	a. Official reports from the government and other key institutions b. Citation or adoption of TA results by key stakeholders c. Web analytics	a. Lack of (i) timely delivery of inputs from counterparts and (ii) commitments to adopt suggested actions from TA results b. Lack of synergy and coordination among key institutions related to ECD c. Overall security and other issues are not conducive for ECD planning and implementation
Outputs 1. ECD policy and operational framework developed in line with best practice 2. ECD feasibility studies and analytical tools developed 3. Pakistan ECD hub developed 4. Strategic policy framework for improving trade competitiveness developed	By 2020: 1. Framework is adopted by at least one stakeholder (2017 baseline: 0) 2. Main study result and tools are adopted by at least two stakeholders (2017 baseline: 0) 3. ECD hub is established in partnerships with at least four think tanks (2017 baseline: 0) 4. Framework is adopted by the government (2017 baseline: 0)	a. Official reports from the government and other key institutions citing the use of TA results for different purposes b. Other sources citing the use of TA results for different purposes	a. Changes in the government and other key stakeholders result in differing interest in and commitment to the TA results b. Lack of continued supports and capacity to adopt the TA results

<p>Key Activities with Milestones</p> <ol style="list-style-type: none"> 1. ECD policy and operational framework developed in line with best practice <ol style="list-style-type: none"> 1.1 Conduct a series of consultation/inception workshops at national and provincial levels to introduce the TA, detail its coverage and implementation plan, and ensure support from federal and provincial governments and other key stakeholders (at least five workshops: 4 provincial and 1 federal, Q1-Q2). 1.2 Consultant recruitment and team formation to produce the specified outputs (various teams will be developed at different stages in accordance with the needs and results of consultations with the governments and other key stakeholders, Q1-Q8) 1.3 Reviewing best practice and developing ECD policy and operational framework and their supporting documents/reports (Q1-Q6). 1.4 Dissemination seminar and institutionalization of the policy and operational framework (Q5-Q8) 2. ECD feasibility studies and analytical tools developed <ol style="list-style-type: none"> 2.1 Consultant recruitment and team formation (Q1-Q2) 2.2 Conducting field surveys, feasibility study and developing analytical tools, and their associated reports (Q2-Q6) 2.3 Dissemination seminar and institutionalization of the feasibility results and analytical tools (Q5-Q8) 3. Pakistan ECD hub developed <ol style="list-style-type: none"> 3.1 Consultant recruitment and team formation (Q1-Q2) 3.2 Developing and ECD hub and its materials and documentations (Q2-Q6) 3.3 Dissemination seminar and institutionalization of the hub (Q6-Q8) 4. Strategic policy framework for improving trade competitiveness developed <ol style="list-style-type: none"> 4.1 Consultant recruitment and team formation (Q1-Q2) 4.2 Developing the policy framework and its supporting documents/reports (Q1-Q4) 4.3 Review and Consultation Workshops for finalizing the policy framework (Q2-Q6) 4.4 Dissemination seminar and institutionalization of the policy framework (Q5-Q8)
<p>Inputs</p> <p>Government of the United Kingdom: \$2,418,081.0^b</p> <p>Note: The government of Pakistan will provide counterpart support in the form of counterpart staff, office accommodation, office supplies, relevant data and information, assistance in arranging meetings and field visits with relevant government agencies, logistics support, and other in-kind contributions.</p>
<p>Assumptions for Partner Financing</p> <p>Not applicable (financing has been secured by the Department for International Development of the Government of the United Kingdom, as part of the Pakistan Economic Corridor Programme).</p>

ECD = economic corridors development; TA = technical assistance.

^a Government of Pakistan, Ministry of Planning, Development and Reform. *Pakistan Vision 2025*. Islamabad; and Asian Development Bank. 2014. *Country Partnership Strategy: Pakistan, 2015–2019*. Manila.

^b Administered by the Asian Development Bank.

Source: Asian Development Bank.

COST ESTIMATES AND FINANCING PLAN

(\$'000)

Item	Amount
Government of the United Kingdom^a	
1. Consultants	
a. Remuneration and per diem	
i. International consultants	330.0
ii. National consultants	430.0
iii. Resource persons	200.0
b. Out-of-pocket expenditures	
i. International and local travel	100.0
ii. Reports, and communications	150.0
2. Workshops and conferences	200.0
3. Surveys ^c	
a. International field research	300.0
b. Domestic field research	270.0
c. Research and survey materials	100.0
4. Miscellaneous administration and support costs	90.0
5. Contingencies ^d	248.1
Total	2,418.1

Note: The technical assistance is estimated to cost \$2,418,081 (equivalent of £1,814,695), of which total contributions from the DFID of the Government of the United Kingdom are presented in the table above. The government will provide counterpart support in the form of counterpart staff, office accommodation, office supplies, relevant data and information, assistance in arranging meetings and field visits with relevant government agencies, logistics support, and other in-kind contributions. Cofinancier reporting is conducted by providing quarterly and annual reports to DFID.

^a Administered by the Asian Development Bank.

^b A consulting firm or institute will be recruited to undertake the surveys.

^c This amount -as well as the total amount- may change due to foreign exchange fluctuations and the TA will adjust accordingly for there will be no additional financing. The total amount also includes bank charges and a provision for foreign exchange fluctuations (if any).

Source: Asian Development Bank estimates.

LIST OF LINKED DOCUMENTS

<http://www.adb.org/Documents/LinkedDocs/?id=51224-001-TARreport>

1. Terms of Reference for Consultants