



# Technical Assistance Report

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Project Number: 52062-001  
Knowledge and Support Technical Assistance (KSTA)  
August 2018

## India: Supporting Logistics Sector Development

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Asian Development Bank

## CURRENCY EQUIVALENTS

(as of 12 July 2018)

Currency unit	–	Indian rupee/s (₹)
₹1.00	=	\$0.0145227
\$1.00	=	₹68.857500

## ABBREVIATIONS

ADB	–	Asian Development Bank
DOC	–	Department of Commerce
DEA	–	Department of Economic Affairs
GDP	–	gross domestic product
GVC	–	global value chain
TA	–	technical assistance

## NOTES

In this report, “\$” refers to United States dollars.

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## KNOWLEDGE AND SUPPORT TECHNICAL ASSISTANCE AT A GLANCE

<b>1. Basic Data</b>		<b>Project Number:</b> 52062-001	
<b>Project Name</b>	Supporting Logistics Sector Development	<b>Department/Division</b>	SARD/SARC
<b>Nature of Activity</b>	Capacity Development, Research and Development	<b>Executing Agency</b>	Asian Development Bank
<b>Modality</b>	Regular		
<b>Country</b>	India		
<b>2. Sector</b>		<b>Subsector(s)</b>	
✓ Industry and trade	Industry and trade sector development	<b>ADB Financing (\$ million)</b>	
Public sector management	Public administration		0.30
Transport	Multimodal logistics		0.20
			0.50
		<b>Total</b>	<b>1.00</b>
<b>3. Strategic Agenda</b>		<b>Subcomponents</b>	
Inclusive economic growth (IEG)	Pillar 1: Economic opportunities, including jobs, created and expanded	<b>Climate Change Information</b>	
Regional integration (RCI)	Pillar 2: Trade and investment	Climate Change impact on the Project	Low
<b>4. Drivers of Change</b>		<b>Components</b>	
Governance and capacity development (GCD)	Organizational development	<b>Gender Equity and Mainstreaming</b>	
Knowledge solutions (KNS)	Knowledge sharing activities	No gender elements (NGE)	✓
Partnerships (PAR)	Bilateral institutions (not client government) Official cofinancing		
<b>5. Poverty and SDG Targeting</b>		<b>Location Impact</b>	
Geographic Targeting	No	Nation-wide	High
Household Targeting	No		
SDG Targeting	Yes		
SDG Goals	SDG8		
<b>6. Risk Categorization</b>		Low	
<b>7. Safeguard Categorization</b>		Safeguard Policy Statement does not apply	
<b>8. Financing</b>			
<b>Modality and Sources</b>		<b>Amount (\$ million)</b>	
<b>ADB</b>		<b>1.00</b>	
Knowledge and Support technical assistance: Technical Assistance Special Fund		1.00	
<b>Cofinancing</b>		<b>1.00</b>	
Republic of Korea e-Asia and Knowledge Partnership Fund (Full ADB Administration)		1.00	
<b>Counterpart</b>		<b>0.00</b>	
None		0.00	
<b>Total</b>		<b>2.00</b>	

## I. INTRODUCTION

1. This knowledge and support technical assistance (TA) will support the preparation, dissemination, and timely application of analytical studies relating to the development of the logistics industry in India.<sup>1</sup> The TA will allow the Asian Development Bank (ADB) to swiftly respond to India's demand for knowledge support on challenges and strategies related to logistics.<sup>2</sup> The TA will also provide capacity building assistance on implementing the outputs of the analytical findings.

2. Logistics development supports the objectives of India's country partnership strategy and corresponding country knowledge plan, which aim to boost India's economic competitiveness and expand access to infrastructure, leading to sustained growth and job creation.<sup>3</sup> The TA will help identify crucial and immediate investment requirements and will promptly translate these requirements into lending operation and investment projects, thereby accelerating their development impact.

## II. ISSUES

3. India is one of the fastest growing large economies in the world, with an average gross domestic product (GDP) per capita growth rate of 7% per annum over the last 2 decades.<sup>4</sup> Despite this rapid growth, India remains under-industrialized. Manufacturing's share of GDP was only 17% in 2017, compared with 21%–29% in comparator countries of East and Southeast Asia. As a result, India's dynamic growth has not been accompanied by significant job creation.

4. Moreover, India's trade with the rest of South Asia remains low. In 2015, the share of India's trade with South Asia accounted for only 3% of its total trade. Countries of the Association of Southeast Asian Nations, by comparison, enjoy much higher intraregional trade.<sup>5</sup> Moreover, also in 2015, India's share of all global trade is just 2%—well behind the 12% share registered by the People's Republic of China.<sup>6</sup> India's integration with regional and global value chains (GVCs) has also been limited. In 2011, India's GVC Participation Index was 43.1%, lower compared with Asian peers such as Malaysia (60.4%), the People's Republic of China (47.7%), Singapore (61.6%), Thailand (54.3%), and Viet Nam (52.3%).<sup>7</sup>

5. Inefficient and uncompetitive logistics drive up the cost of doing business in India and are one of the main reasons behind the country's lagging industrial expansion.<sup>8</sup> Improving the efficiency of logistics by better connecting production and consumption markets over a wider geographic expanse will reduce the cost of doing business in India.

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<sup>1</sup> The TA is not included in country operations business plan (ADB. 2017. *Country Operations Business Plan: India, 2018–2020*. Manila). In a letter dated 28 November 2017, the Department of Economic Affairs (DEA) officially requested that ADB support the Department of Commerce (DOC) to develop the logistics industry in India. Logistics development was also identified as a priority area in the South Asia Subregional Economic Cooperation Operational Plan, 2016–2025.

<sup>2</sup> The TA first appeared in the business opportunities section of ADB's website on 16 March 2018.

<sup>3</sup> ADB. 2017. *Country Partnership Strategy: India, 2018–2022*. Manila.

<sup>4</sup> World Bank. [World Development Indicators](#). (accessed 25 January 2018).

<sup>5</sup> Malaysia (26%), Singapore (26%), Thailand (22%) and Viet Nam (14%). ADB. [Integration Indicators](#). (accessed 16 February 2018).

<sup>6</sup> ADB. [Integration Indicators](#). (accessed 16 February 2018).

<sup>7</sup> World Trade Organization. [Global Value Chains](#). (accessed 24 March 2018).

<sup>8</sup> Logistics is defined as the process of planning, implementing, and controlling procedures for the efficient transportation and storage of goods, services, and related information between the point of origin and the point of consumption in order to meet customers' requirements. Council of Supply Chain Management Professionals. 2013. [CSCMP Supply Chain Management Definitions and Glossary](#).

6. Manufacturing is a major driver of the logistics industry in India, with companies spending 2%–20% of their revenue on logistics.<sup>9</sup> With the Government of India focused on reinvigorating manufacturing through initiatives such as economic corridors and investment zones, the logistics industry will be critical. The government expects freight movement in the country to continue its growth trajectory, with an expected annual growth rate of 8%–10% over the next 10 years. In 2018, the logistics industry is expected to generate \$360 billion in value-added, up from \$115 billion in 2017.<sup>10</sup>

7. The growing recognition of the important role of logistics in India's industrialization is evident in recent government initiatives. In 2015, the government initiated the Logistics Efficiency Enhancement Program, which aims to support the Make in India<sup>11</sup> campaign by reducing logistics costs by up to 10%. In November 2017, the government granted infrastructure status to the logistics industry, a landmark move to lure private investments into the industry by easing logistics firms' access to long-term credit at lower rates.

8. Participation in GVCs in manufacturing also depends on a robust logistics industry. Goods moving through GVCs typically cross multiple borders during the production process. Parts and components can be imported from different locations to the producing country for final assembly. Efficient logistics are necessary for firms to be able to participate cost effectively in this network of activities and compete globally.

9. India's service industry also presents great opportunities for logistics. It is considered one of the fastest growing service industries in the world—9.2% in 2016—and its growth is expected to accelerate in the coming years.<sup>12</sup> The e-commerce industry, one of the big drivers of logistics and physical distribution networks, has been on an upward trajectory and is expected to grow at a compound annual growth rate of 28% from 2016 to 2020, reaching \$63.7 billion by 2020.<sup>13</sup>

10. However, the logistics industry in India is inefficient compared with its peer economies. India ranked relatively low in the World Bank's Logistics Performance Index, placing 35th in 2016, behind Asian neighbors Singapore (5th); Hong Kong, China (9th); Republic of Korea (24th); Taipei, China (25th); the People's Republic of China (27th); and Malaysia (32nd).<sup>14</sup> Logistics costs in India remain high compared with developed countries. Logistics costs as a percentage of GDP stood at 13%–14% in 2015, doubling from 7%–8% in 2000. By comparison, logistics costs in developed countries average about 8%–10% of GDP. In more specific terms, India's average road freight cost per ton per kilometer, adjusted for purchasing power parity, is \$0.03, which is almost twice as much road freight costs in the United States.<sup>15</sup>

11. One main cause of India's lower performance is the lack of a comprehensive development strategy for logistics. Another constraint is an inadequate multi-modal transport

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<sup>9</sup> Knight Frank India. 2014. [India Logistics & Warehousing Report 2014](#).

<sup>10</sup> DK Aggarwal. 2017. [In one stroke, outlook for logistics stocks changed: Should you buy?](#) *Economic Times*. 25 November.

<sup>11</sup> The Make in India initiative which was launched in September 2014 aims to transform India into a global design and manufacturing hub.

<sup>12</sup> Deloitte India. 2018. [India Services Sector: A multi-trillion dollar opportunity for global symbiotic growth](#). Deloitte.

<sup>13</sup> India Brand Equity Foundation. 2018. [Indian Ecommerce Industry Analysis](#).

<sup>14</sup> World Bank. [Logistics Performance Index](#). (accessed 16 February 2018).

<sup>15</sup> Government of India, Ministry of Road Transport and Highways. 2017. *Concept Note: Logistics Efficiency Enhancement Program—Development of Multimodal Logistics Parks*. Delhi.

network, including railways, roads, seaports, airports, and waterways. Storage and/or interchange elements like multimodal logistics parks, warehouses, inland container depots, container freight stations, and air freight stations are also lacking. In addition, logistics skills are deficient, and information and communication technology is underutilized.

12. The government needs to improve its capacity to design and implement comprehensive strategies on logistics. Several aspects of the logistics industry must be better planned, managed, and monitored to overcome institutional silos and move toward an integrated approach to logistics development in the country. India's logistics industry falls under the purview of multiple ministries and agencies, each of which are responsible for different modes of transport and related aspects of logistics development. Legal and institutional frameworks that are incompatible with a modern and integrated logistics industry are another constraint.

### III. THE TECHNICAL ASSISTANCE

#### A. Impact and Outcome

13. The TA is aligned with the following impact: logistics efficiency improved.<sup>16</sup> The TA will have the following outcome: national integrated logistics development plan approved.<sup>17</sup>

#### B. Outputs, Methods, and Activities

14. **Output 1: National integrated logistics development plan prepared.** The TA will develop a study agenda to respond to India's demand for knowledge solutions on logistics development. The study will focus on the following six building blocks, which will also be the basis for an integrated logistics development plan:

- (i) improving logistics and transport infrastructure;
- (ii) improving transportation assets and handling facilities;
- (iii) reforming institutional structure to ensure efficient planning and better coordination among various agencies involved with logistics;
- (iv) streamlining the logistics policy, regulatory, and legal framework;
- (v) improving skills specific to logistics needs; and
- (vi) building an information and communication technology backbone to simplify logistics processes.

15. The integrated logistics development plan will adopt a multipronged approach to address the demands of various sectors.<sup>18</sup> It will adopt a technical approach to infrastructure planning that is consistent with India's strategy to establish logistics corridors and strengthen key product value chains.<sup>19</sup> The integrated logistics development plan will take into consideration natural hazards and climate change risks.

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<sup>16</sup> Government of India, Ministry of Road Transport and Highways.n.d. [Concept Note: Logistics Efficiency Enhancement Program](#); Government of India. [Bharatmala Pariyojana](#).

<sup>17</sup> The design and monitoring framework is in Appendix 1.

<sup>18</sup> Activities to be undertaken under the plan will include assessment of the state of India's logistics infrastructure and facilities; a study of agriculture and industrial value chains; and a study of regulatory and institutional mechanisms. Activities will be aligned with the Project Proposal Report and included in the Outline Terms of Reference for Consultants.

<sup>19</sup> Over the course of the preparation and implementation of the TA, further assessment and regular consultation with key government agencies will be undertaken to clearly set out the TA project's detailed scope of work and methodologies, and to ensure that TA outputs meet the needs of the client.

16. **Output 2: Capacity building on implementation of national integrated logistics development plan provided.** Alongside provision of knowledge solutions, the TA will provide support to enhance the capacity of government agencies to design and implement comprehensive logistics plans that meet the demands of a modern logistics industry. This could involve technical support for reviewing institutional and policy framework, and regulations affecting logistics; implementing logistics development plans; planning and promoting logistics parks and related projects to potential investors; and providing incentives and a proper business environment to encourage private sector participation in logistics. The TA will provide venues for government agencies to learn about global best practices on logistics development via knowledge sharing arrangements among developing economies through the conduct of various learning events such as workshops, forums, and seminars.

### **C. Cost and Financing**

17. The TA is estimated to cost \$2,100,000, of which (i) \$1,000,000 will be financed on a grant basis by ADB's Technical Assistance Special Fund (TASF-other sources) and (ii) \$1,000,000 will be financed on a grant basis by the Republic of Korea e-Asia and Knowledge Partnership Fund and administered by ADB. The key expenditure items are listed in Appendix 2. Disbursement of funds is front-loading.

18. The government will provide counterpart support in the form of workshop venues, transportation, remuneration and per diem of counterpart staff who will support the preparation of the national integrated development plan and related activities, and other in-kind contributions.

19. Civil works, procurement of large-scale equipment, permanent staffing costs, and the hiring of staff consultants are ineligible expenditures under the Republic of Korea e-Asia and Knowledge Partnership Fund. The items in the cost estimates and financing plan are eligible expenditures under the Republic of Korea e-Asia and Knowledge Partnership Fund.

### **D. Implementation Arrangements**

20. The TA will be implemented from July 2018 to June 2021. ADB will administer the TA through the Regional Cooperation and Operations Coordination Division of the South Asia Department and the India Resident Mission.<sup>20</sup> ADB will work closely with various government agencies in implementing the TA activities. The South Asia Regional Cooperation and Operations Coordination Division and the India Resident Mission will select, supervise, and evaluate consultants. The implementation arrangements are summarized in the table.

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<sup>20</sup> In accordance with the staff instruction on business process for knowledge and support TA (clause 3), the Strategy, Policy, and Review Department has confirmed that ADB, rather than the government, may act as the executing agency for country-specific TA projects where appropriate justifications exist. In this case, the DEA formally requested ADB to support the DOC in developing the logistics industry. Logistics was granted infrastructure status only in November 2017, and a new division in the DOC was created to support nationwide development of logistics. The DOC and DEA requested ADB support, given ADB's experience in logistics development. ADB is well equipped to lead the TA implementation and coordinate multiagency issues. The DEA has no objection to ADB serving as the executing agency for this TA. In the same vein, capacity building support for the DOC and relevant agencies will be part of the TA outputs such that future logistics projects may be implemented by the government.

### Implementation Arrangements

Aspects	Arrangements		
Indicative implementation period	August 2018–July 2021		
Executing agency	ADB		
Implementing agency	ADB		
Consultants	To be selected and engaged by ADB		
	Individual consultants selection	International expertise (84 person-months)	\$730,000
	Individual consultants selection	National expertise (84 person-months)	\$480,000
Disbursement	The TA resources will be disbursed following ADB's <i>Technical Assistance Disbursement Handbook</i> (2010, as amended from time to time).		

ADB = Asian Development Bank, TA = technical assistance.

Source: Asian Development Bank.

21. **Consulting services.** ADB will engage individual consultants to implement the TA activities. Consultants will work on transport, value chain analysis, infrastructure, finance, regulatory and institutional framework, and other thematic sectors related to the development of logistics. ADB will engage consultants following ADB's Procurement Policy (2017, as amended from time to time) and its associated project administration instructions and/or staff instructions.<sup>21</sup>

22. **Cofinancier requirements.** The Republic of Korea e-Asia and Knowledge Partnership Fund requires annual monitoring and progress reports.

#### IV. THE PRESIDENT'S DECISION

23. The President, acting under the authority delegated by the Board, has approved (i) the Asian Development Bank (ADB) administering a portion of technical assistance not exceeding the equivalent of \$1,000,000 to be financed on a grant basis by the Republic of Korea e-Asia and Knowledge Partnership Fund, and (ii) ADB providing the balance not exceeding the equivalent of \$1,000,000 on a grant basis to the Government of India for Supporting Logistics Sector Development, and hereby reports the action to the Board.

<sup>21</sup> Terms of Reference for Consultants (accessible from the list of linked documents in Appendix 3).

## DESIGN AND MONITORING FRAMEWORK

<b>Impact the TA is Aligned with</b>			
Logistics efficiency improved <sup>a, b</sup>			
<b>Results Chain</b>	<b>Performance Indicators with Targets and Baselines</b>	<b>Data Sources and Reporting</b>	<b>Risks</b>
<b>Outcome</b> National integrated logistics development plan approved.	By 2022: a. Logistics and transport infrastructure framework adopted by at least 2 government agencies (2017 baseline: not applicable).	a. Development plans of government agencies.	Change in political leadership with a different development agenda.
<b>Outputs</b> 1. National integrated logistics development plan prepared.  2. Capacity building on implementation of national integrated logistics development plan provided.	By 2021: 1a. National integrated logistics development plan finalized (2017 baseline: not applicable).  1b. National integrated logistics development plan disseminated to at least 3 government agencies (2017 baseline: not applicable).  1c. Analytical report and/or policy brief published (2017 baseline: not applicable).  By 2021: 2a. At least 150 government officials reported increased knowledge on designing and implementing logistics plans (2017 baseline: not applicable).  2b. Private sector investors from at least 2 countries participated in promotional activities (2017 baseline: not applicable).  2c. At least 2 consultation workshops on challenges, requirements, and strategies related to logistics conducted for private investors (2017 baseline: not applicable).	1a. Consultants' report.  1b. Workshop and conference summaries.  1c. Consultants' report.  2a. Training evaluation reports.  2b. Forum summaries.  2c. Forum summaries.	Extended process of consensus-building among stakeholders delays completion of TA outputs.

<p><b>Key Activities with Milestones</b></p> <p><b>1. National integrated logistics development plan prepared.</b></p> <p>1.1 Review and evaluate the state of various sectors and themes related to logistics (Q3 2018–Q2 2019).</p> <p>1.2 Assess the gaps in logistics development plan of various sectors and identify how these can be integrated in the pan (Q3 2018–Q2 2019).</p> <p>1.3 Develop a framework for the integrated logistics development plan based on the building blocks of integrated logistics development framework (Q3 2018–Q4 2018).</p> <p>1.4 Undertake consultation workshops with various stakeholders and government counterparts to get policy directions on the logistics industry study (Q3 2018–Q2 2020).</p> <p>1.5 Prepare the national integrated logistics development plan and submit to the Government of India (Q3 2018–Q4 2019).</p> <p>1.6 Conduct dissemination workshops on the national integrated logistics development plan (Q1 2019–Q1 2021).</p> <p>1.7 Publish the national integrated logistics development plan and upload it to the website of ADB's South Asia Department and government-concerned websites (Q3 2020).</p> <p>1.8 Prepare analytical report on national integrated logistics development with policy advice and/or a policy brief (Q4 2019–Q2 2020).</p> <p><b>2. Capacity building on implementation of national integrated logistics development plan provided.</b></p> <p>2.1 Conduct inception exercise and assessment to identify specific country needs for new knowledge of logistics development (Q3–Q4 2018).</p> <p>2.2 Conduct consultation workshops with investors to obtain private sector perspectives on challenges and requirements related to logistics (Q3–Q4 2018).</p> <p>2.3 Develop work plan for knowledge solution activities to be conducted under the TA (Q3–Q4 2018).</p> <p>2.4 Organize workshops and conferences to enhance the capacity of government agencies to design and implement comprehensive logistics plans (Q3 2018–Q3 2020).</p> <p>2.5 Design strategies to improve investment opportunities in logistics (Q3 2018–Q2 2020).</p> <p>2.6 Organize workshops and conferences to present investment opportunities in India's logistics industry (Q3 2018–Q3 2020).</p> <p><b>TA Activities</b> Engage consultants.</p>
<p><b>Inputs</b></p> <p>ADB: \$1,000,000 Republic of Korea e-Asia and Knowledge Partnership Fund: \$1,000,000</p> <p>Note: The government will provide counterpart support in the form of counterpart staff, office accommodation, office supplies, secretarial assistance, domestic transportation, and other in-kind contributions.</p>
<p><b>Assumptions for Partner Financing</b></p> <p>Not Applicable</p>

ADB = Asian Development Bank, Q= quarter, TA = technical assistance.

<sup>a</sup> Ministry of Road Transport and Highways. [Logistics Efficiency Enhancement Program](#).

<sup>b</sup> Government of India. [Bharatmala Pariyojana](#).

Source: Asian Development Bank.

**COST ESTIMATES AND FINANCING PLAN**  
(\$'000)

Item	Amount
<b>A. Asian Development Bank<sup>a</sup></b>	
1. Consultants	
a. Remuneration and per diem	
i. International consultants	200.0
ii. National consultants	480.0
b. Out-of-pocket expenditures	
i. International and local travel	120.0
2. Training, seminars, workshops, forums, and conferences	
a. Facilitators and resource persons	30.0
b. Venue rental	50.0
c. Participants	50.0
d. Representation <sup>b</sup>	10.0
3. Miscellaneous administration and support costs <sup>c</sup>	20.0
4. Contingency	40.0
<b>Subtotal (A)</b>	<b>1,000.0</b>
<b>B. Republic of Korea e-Asia and Knowledge Partnership Fund<sup>d</sup></b>	
1. Consultants	
a. Remuneration and per diem	
i. International consultants	530.0
b. Out-of-pocket expenditures	
i. International and local travel	180.0
2. Training, seminars, workshops, forums, and conferences	
a. Facilitators and resource persons	20.0
b. Venue rental	70.0
c. Participants	150.0
d. Representation <sup>b</sup>	10.0
3. Contingency	40.0
<b>Subtotal (B)</b>	<b>1,000.0</b>
<b>Total</b>	<b>2,000.0</b>

Note: The TA is estimated to cost \$2,100,000, of which contributions from the Asian Development Bank and Republic of Korea e-Asia and Knowledge Partnership Fund are presented in the table above. The government will provide counterpart support in the form workshop venues, transportation, remuneration and per diem of counterpart staff who will support the preparation of the national integrated development plan and related activities, and other in-kind contributions. The value of the government contribution is estimated at 5% of the total TA cost.

<sup>a</sup> Financed by the Asian Development Bank's Technical Assistance Special Fund (TASF-other sources).

<sup>b</sup> Includes entertainment expenses such as alcoholic beverages and other expenses relevant to holding meetings.

<sup>c</sup> Includes printing of publications and reports.

<sup>d</sup> Administered by the Asian Development Bank.

Source: Asian Development Bank estimates.

**LIST OF LINKED DOCUMENTS**

<http://www.adb.org/Documents/LinkedDocs/?id=52062-001-TARreport>

1. Terms of Reference for Consultants