

Technical Assistance Report

Project Number: 48370-001 Regional—Policy and Advisory Technical Assistance (R-PATA) December 2014

Supporting Industrial Park Development in the Central Asia Regional Economic Cooperation Region

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Asian Development Bank

ABBREVIATIONS

ADB	_	Asian Development Bank
CAREC	_	Central Asia Regional Economic Cooperation
DMC	_	developing member country
NSR	_	New Silk Road
RCI	_	regional cooperation and integration
ТА	-	technical assistance

NOTE

In this report, "\$" refers to US dollars.

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CONTENTS

Page

POL	LICY AND ADVISORY TECHNICAL ASSISTANCE AT A GLANCE	
I.	INTRODUCTION	1
II.	ISSUES	1
III.	THE POLICY AND ADVISORY TECHNICAL ASSISTANCE	3
	A. Impact and Outcome	3
	B. Methodology and Key Activities	4
	C. Cost and Financing	4
	D. Implementation Arrangements	5
IV.	THE PRESIDENT'S DECISION	5
APP	PENDIXES	
1.	Design and Monitoring Framework	6
2.	Cost Estimates and Financing Plan	8
3.	Outline Terms of Reference for Consultants	9

POLICY AND ADVISORY TECHNICAL ASSISTANCE AT A GLANCE

1.	Basic Data			Project Number	48370-001
	Project Name	Supporting Industrial Park Development in the Central Asia Regional Economic Cooperation Region	Department /Division	CWRD/CWRC	
	Country Borrower	REG N/A	Executing Agency	Asian Development Bank	
	Sector	Subsector(s)		ADB Financing (\$ million)
1	Industry and trade	Industry and trade sector development		Total	0.75 0.75
3.	Strategic Agenda	Subcomponents		nge Information	
	Inclusive economic growth (IEG) Environmentally sustainable growth (ESG) Regional integration (RCI)	Pillar 1: Economic opportunities, including jobs, created and expanded Urban environmental improvement Pillar 1: Cross-border infrastructure Pillar 2: Trade and investment	Climate Char Project	nge impact on the	Low
4.	Drivers of Change	Components	Gender Equit	y and Mainstreaming	
	Governance and capacity development (GCD) Knowledge solutions (KNS) Partnerships (PAR) Private sector development (PSD)	Client relations, network, and partnership development to partnership driver of change Knowledge sharing activities Implementation United Nations organization Public sector goods and services essential for private sector development	No gender ele	ements (NGE)	1
5.	Poverty Targeting		Location Imp	act	
	Project directly targets poverty	No	Regional		High
6.	TA Category:	В	1		
7.	Safeguard Categorizat	ion Not Applicable			
	Financing				
	Modality and Sources			Amount (\$ million)	
	ADB			0.75	
	Sovereign Policy and Special Fund	d advisory technical assistance: Technica	al Assistance	0.75	
	Cofinancing			0.00	
	None			0.00	
	Counterpart			0.00	
	None			0.00	
	Total			0.75	
9.	Effective Development				
	Use of country procuren	nent systems No ancial management systems No			

I. INTRODUCTION

1. The Midterm Review of Strategy 2020 underscored the need in the current challenging global economic context for the Asian Development Bank (ADB) to complement its investments in cross-border connectivity infrastructure by supporting other drivers of second-generation regional cooperation and integration (RCI).¹ The strategic framework for the Central Asia Regional Economic Cooperation (CAREC) Program, 2011–2020 (CAREC 2020) states that the development of economic corridors can help diversify the region's industries.² This is expected to make the CAREC developing member countries (DMCs) more competitive by strengthening technology, logistics, and other business support services. In line with Strategy 2020's designation of RCI as one of ADB's core areas of operations, ADB's current country partnership strategies for these DMCs make support for the CAREC program and regional economic corridor development a priority.

2. The CAREC Transport and Trade Facilitation Strategy 2020 sets three operational priorities: developing multimodal corridor networks, improving trade and border crossing services, and improving operational and institutional effectiveness.³ Under the strategy, CAREC aims to establish and operationalize five regional multimodal logistics centers by 2020. Industrial park development will bolster this goal and help develop the CAREC corridors by building industrial demand.

3. This technical assistance (TA)⁴ is intended to improve the policy framework for planning, developing, and upgrading industrial parks in CAREC countries and thereby increase the region's industrial productivity and competitiveness. It will focus on two pilot countries—Kazakhstan and the Kyrgyz Republic that best represent the different levels of progress among the CAREC DMCs in developing industrial parks. The 13th CAREC Ministerial Conference held on 5–6 November 2014 in the Kyrgyz Republic endorsed a framework for corridor development and the operationalization of this framework through a memorandum of understanding on the Almaty–Bishkek Corridor Initiative, the first of city level regional cooperation between Kazakhstan and the Kyrgyz Republic. ⁵ Pilot work in these two countries will provide useful lessons and experience for other CAREC countries. ⁶ The design and monitoring framework is in Appendix 1.

II. ISSUES

4. The industrial structures of most countries in Central Asia are less diversified and in some cases dominated by their natural resource sectors. Heavy dependency on the export of mineral and energy resources has made these DMCs highly vulnerable to shocks and price

¹ ADB. 2014. *Midterm Review of Strategy 2020: Meeting the Challenges of a Transforming Asia and Pacific.* Manila.

² The CAREC member countries are Afghanistan, Azerbaijan, People's Republic of China, Kazakhstan, Kyrgyz Republic, Mongolia, Pakistan, Tajikistan, Turkmenistan, and Uzbekistan. ADB is CAREC Secretariat. The CAREC strategy provides a strategic direction, vision, and mission for 2011–2020. It aims to turn the landlocked CAREC nations into land-linked economies by expanding trade and improving competitiveness. ADB. 2012. CAREC 2020: A Strategic Framework for the Central Asia Regional Economic Cooperation Program, 2011–2020. http://www.carecprogram.org/uploads/docs/CAREC-Publications/2012/CAREC-2020-Strategic-Framework.pdf.

³ The CAREC Transport and Trade Facilitation Strategy 2020 was refined in 2013 to account for lessons during the initial phase of implementation and changes in the CAREC program since 2008, particularly its expanded membership and the new strategic framework for 2011–2020.

⁴ The TA concept paper was approved by the vice-president for Operations 1 on 6 November 2014.

⁵ ADB. 2014. *Joint Ministerial Statement of the 13th Ministerial Conference of the Central Asia Regional Economic Cooperation.* <u>http://www.carecprogram.org/uploads/events/2014/MC-Nov-Bishkek/Key-Documents/001 101 202 13th-MC-Joint-Ministerial-Statement.pdf.</u>

⁶ The TA first appeared in the business opportunities section of ADB's website on 10 November 2014.

fluctuations in their external markets. Many were severely affected by the worldwide economic crisis of 2008. At the same time, traditional extraction and production processes of minerals and energy are unsustainable, causing natural resource depletion and environmental degradation in the region. Central Asian countries face common development issues, such as weak infrastructure, high transaction costs, constrained access to finance and low levels of human capital. These challenges hinder deeper economic integration within the region, undermine industrial sector upgrading in terms of productivity and competitiveness, and discourage foreign direct investment.

5. The Midterm Review of ADB's Strategy 2020 identified the most critical drivers of second-generation RCI as higher productivity and competitiveness of economies, combined with efforts to mitigate vulnerabilities and reduce inequalities (footnote 1). New types of interventions will be needed to achieve results in these areas in Central Asia's DMCs, as well as to meet the other needs inherent in the growth process. Productivity plays a central role, since increasing it is one of the main ways to improve competitiveness. The development of a CAREC production and supply chain network will lead to greater specialization and productivity in the region. The RCI community of practice in ADB is expanding its examination of the contribution RCI can make to better productivity, particularly through the use of economic zones and industrial parks.

6. To stimulate economic cooperation, the CAREC countries have undertaken various steps toward developing the New Silk Road (NSR). Before political instability and the advent of faster and safer sea transport routes led to its decline and disappearance, the original Silk Road was a series of routes between Asia and Europe along which intercontinental and interregional cultural and trade flows had grown for many centuries. In recent decades, the NSR has started to emerge due to globalization and regional integration.

7. The CAREC economic corridor development initiative aligns well with the NSR initiative of the CAREC DMCs. Both promote economic diversification and urban and industrial agglomeration through improved physical connectivity. The six designated CAREC corridors overlap geographically with key portions of the NSR. Economic corridor development has been identified as one of the core priorities in the CAREC 2020, and the governments of the CAREC DMCs share the understanding that this involves expanding and using physical infrastructure to catalyze and organize economic activities spatially to generate productivity and growth.

8. Sound economic policy that helps expand and improve transport and business infrastructure can boost trade, promote economic diversification and competitiveness, and promote productivity. Providing the effective business infrastructure crucial to the development of industrial and economic corridors—and through them, better regional integration, economic growth, and living standards—can require the building of industrial parks, often at transport nodes. Industrial parks incubate new enterprises, support start-ups, and encourage development of knowledge-based businesses. They not only serve to expand exports and attract foreign direct investment, but also act as laboratories for economic and industrial policy experiments.

9. Many of the CAREC countries lack strategic planning in developing industrial parks and business incubators for promoting the optimization of industrial structures. Such planning is needed to avoid chaotic competition in industrial development between neighboring countries and to pursue industrial development that is inclusive and sustainable. The appropriate regulatory frameworks that are vital for gaining the confidence of investors are also missing.

10. Business infrastructure development is at different stages in the different CAREC DMCs. While Kazakhstan is relatively advanced in this respect, the Kyrgyz Republic is only beginning to plan and develop its industrial parks. Although Kazakhstan has established several industrial parks, it is still formulating the legislation it needs to regulate the establishment of these parks and their activities strategically. Its existing laws and regulations are inadequate, and Kazakhstan can do better in managing the creation and operations of its industrial parks cohesively at either the national or the local level.⁷ The Kyrgyz Republic has undertaken some strategic planning in promoting the development of industrial zones, industrial parks, business incubators, and business clusters. It currently has four free economic zones but no operating industrial parks.

III. THE POLICY AND ADVISORY TECHNICAL ASSISTANCE

A. Impact and Outcome

11. The impact of the TA will be more inclusive and sustainable industrial development in the CAREC region. The outcome will be improved policy for industrial park development in Kazakhstan and the Kyrgyz Republic.

12. The impact and outcome of the TA will be achieved through the delivery of the following outputs:

- Background studies on industrial park development in Kazakhstan and the (i) Kyrgyz Republic prepared. To get a clearer overview and build on existing findings, background studies will be conducted to identify outstanding issues in industrial park development in Kazakhstan and the Kyrgyz Republic. The studies may cover but will not be limited to the following aspects: (i) global trends in and the regional context of industrial park development; (ii) the status guo of the existing and planned industrial parks in the two pilot countries; (iii) the challenges and opportunities related to hard infrastructure, the development of related services, and institutional and legal frameworks; (iv) analyses to clarify how relevant cities and industrial parks benefit from the industrial corridor: (v) identification of adaptable models of industrial park development for these two countries that will lead to their integration into the regional value chain; (vi) the mapping of participation in regional and global value chains; and (vii) recommendations, with the formulation of a list of possible TA and/or project proposals in selected industrial parks.
- (ii) **Strategic frameworks for industrial park development in Kazakhstan and the Kyrgyz Republic developed.** Integrating industrial park development into the regional value chain in a coordinated manner with neighboring countries requires strategic planning, scientific site selection, rational functional orientation, a sustainable development pattern, close interaction between key stakeholders, a unified layout of industrial parks within each country, and healthy competition and complementarity with neighboring DMCs. The development of strategic frameworks for industrial park development in Kazakhstan and the Kyrgyz Republic under the TA will provide a decision-making tool for better communication, interaction, and cooperation between different actors that concentrates on the best use of resources and structures. These actors include

⁷ UNIDO. 2014. Conference Report, *Second regional conference on a new generation of industrial parks.* Urumqi, Xinjiang Uygur Autonomous Region, the People's Republic of China.

companies along the value chain, local and regional governments, local communities and social organizations and groups, and research institutions. The strategic frameworks will identify the main barriers to successful industrial park development in each country and provide guidelines on how to overcome these obstacles through strategies, policies, and programs.

B. Methodology and Key Activities

- 13. The following activities will be undertaken under the TA:
 - (i) Background studies. The TA will conduct country consultations in Kazakhstan and the Kyrgyz Republic to exchange views with relevant stakeholders about the objectives and scope of activities and clarify necessary governmental involvement in TA implementation. The TA will review reports and studies that relate directly or indirectly to industrial park development in the two countries, conduct interviews with key government officials and stakeholders to collect necessary information and data, submit and present the draft study reports to the two governments, and present and disseminate the final background study report to key stakeholders in these two countries.
 - (ii) **Strategic frameworks.** The TA will conduct a roundtable on the strategic frameworks for industrial park development and identify potential areas of technical cooperation to be formulated and included in future strategic frameworks; design and formulate the strategic frameworks for Kazakhstan and the Kyrgyz Republic; develop a list of TA and/or project proposals in selected industrial parks; and organize a dissemination workshop on the strategic frameworks, which will include concrete technical cooperation project concept proposals on industrial parks and cities.
- 14. The project assumptions and risks are the following:
 - (i) Assumptions. It has been assumed that (i) improved policies for industrial development will be enacted and implemented; (ii) other CAREC countries will improve their respective policy frameworks for industrial park development by replicating or learning from the strategic frameworks the TA will help develop; (iii) a sound investment environment for attracting capital flows for industrial development; (iv) the governments' commitments to inclusive, sustainable industrial development will continue; (v) business community representatives will participate actively in all project consultation meetings; and (vi) the project will have timely access to data and relevant personnel in place in Kazakhstan and the Kyrgyz Republic.
 - (ii) Risks. Potential obstacles to the TA project's success include the risks that (i) weak institutional capacity resulting in ineffective operationalization of industrial policy frameworks, (ii) insufficient financial and human resources for developing and transforming industrial parks, (iii) weak government capacity of engaging key stakeholders and obtaining the critical private sector response, (iv) changes in staff within key agencies leading to a loss of support for the TA objectives within these agencies, and (v) political interference delaying submission of the policies.

C. Cost and Financing

15. The TA is estimated to cost \$750,000, which will be financed on a grant basis by ADB's Technical Assistance Special Fund (TASF-V). About 5% of the budget for trainings, workshops, seminars, and conferences is allocated for representation costs that are confirmed as direct and

identifiable costs to the TA and the resource persons engaged in these activities may be ADB staff. The governments of Kazakhstan and the Kyrgyz Republic will provide counterpart support in the form of hosting meetings and workshops, funding their in-country participation in the meetings, capacity-building activities, and other in-kind contributions.

D. Implementation Arrangements

16. ADB will be the executing agency. The Regional Cooperation and Operations Coordination Division of ADB's Central and West Asia Department will be responsible for administering and supervising the TA. ADB will (i) create, consolidate, and disseminate knowledge and information to support industrial park development in the two pilot countries; (ii) help concerned national agencies build their institutional capacity to manage industrial park development more effectively; and (iii) act as the facilitator, catalyst, and coordinator of the development of the planned strategic frameworks for industrial park development in the two ADB resident missions and the relevant national authorities in Kazakhstan and the Kyrgyz Republic.

17. The TA will finance about 41 person-months of consultant services—17 person-months of international services and 24 person-months of national consultant inputs. One international consultant will be engaged as the leader of the team that will develop the strategic frameworks for industrial park development in the two countries. A second international consultant will be engaged to conduct the background studies and help develop the strategic frameworks. Two country-based national consultants will be hired to assist in the background studies, develop the national strategic frameworks, and organize meetings in the field. Consultants will be hired as individuals to ensure that varied perspectives are available from key experts whose skills, qualifications, knowledge, and experience are mutually reinforced and supplemented. Resource persons may be engaged to help develop and carry out knowledge-sharing activities. The resource persons will work closely with ADB staff in preparing the specific material and presenting it at workshops and other capacity-building events. These resource persons may also be ADB staff. The consultants will be engaged according to ADB's Guidelines on the Use of Consultants (2013, as amended from time to time). The outline terms of reference for the consultants are in Appendix 3. Lump sum payments and output-based contracts will be considered for consulting services under the TA. Disbursement under the TA will be done in accordance with the Technical Assistance Disbursement Handbook (2010, as amended from time to time). The TA will be implemented over 33 months from January 2015 to September 2017.

18. The United Nations Industrial Development Organization will work closely with ADB to promote industrial park development in the CAREC region and provide necessary technical support to this TA during its implementation.

IV. THE PRESIDENT'S DECISION

19. The President, acting under the authority delegated by the Board, has approved the provision of technical assistance not exceeding the equivalent of \$750,000 on a grant basis for Supporting Industrial Park Development in the Central Asia Regional Economic Cooperation Region, and hereby reports this action to the Board.

	Performance Targets and	Data Sources and	Assumptions and
Design Summary	Indicators with Baselines	Reporting Mechanisms	Risks
Impact More inclusive and sustainable industrial development in the CAREC region	By 2020, the share of industrial production in the GDP of the CAREC region increased to 40% compared with the 2012 baseline value	National statistics offices and concerned government agencies UNIDO's country analysis	Assumptions Improved policies for industrial development will be enacted and implemented.
	(34%) ^a	for industrial development World Bank's World Development Indicators	Other CAREC countries will improve their policy frameworks for industrial park development by replicating or learning from the intended strategic frameworks.
			Sound investment environment attracting capital flows for industrial development.
			Risks
			Weak institutional capacity resulting in ineffective operationalization of the industrial policy frameworks.
			Insufficient financial and human resources for developing and transforming industrial parks.
Outcome Improved policy for industrial park development in Kazakhstan and the	At least two proposals for policy improvements for industrial park development in each of the two countries	Government gazette	Assumption The commitment of the governments to inclusive, sustainable industrial development will continue.
Kyrgyz Republic	drafted and submitted for approval by 2017		Risk
			Political interference delaying submission of the policies.
Outputs 1. Background studies on industrial park development in Kazakhstan and the Kyrgyz Republic prepared	Four background studies endorsed by Ministry of National Economy of Kazakhstan and Ministry of Economy of the Kyrgyz Republic by 2016	Government gazette Executing agency project progress and monitoring reports	Assumption Business community representatives will participate actively in all project consultation meetings.
- - - - - - - - - - - - -			Risk
			Weak government capacity of engaging key stakeholders and obtaining critical private sector response

DESIGN AND MONITORING FRAMEWORK

	Performance Targets and	Data Source	s and	Assumptions and
Design Summary	Indicators with Baselines	Reporting Mec		Risks
2. Strategic frameworks for industrial park development in Kazakhstan and the Kyrgyz Republic	Two Strategic frameworks endorsed by Ministry of National Economy of Kazakhstan and Ministry of Economy of the Kyrgyz	Government gaze Executing agency progress and mor reports	project	Assumption The project will have timely access to data and relevant personnel in place in the two countries.
developed	Republic by 2017			Risk
				Staff changes in key agencies leading to a loss of support for the TA objectives within those agencies.
Activities with Milesto	ones		Inputs	
1. Background studies and the Kyrgyz Republic	on industrial park developmen prepared	nt in Kazakhstan		50,000 (TASF-V)
to exchange views volume to exchange views volume to be and scope	sultations in Kazakhstan and the with relevant government stakel o of activities under the TA and ce in TA implementation (March-	nolders about the clarify necessary	International and national consultant with appropriate skills and expertise Note: The governments of Kazakhstan and the Kyrgyz Republi	
	studies that directly or indirectly or indirectly or indirectly pment in these two countries (Ju		form of log	e counterpart support in the gistical arrangements, ackages, office supplies,
	with key government officials an ormation (October 2015–February			l assistance, domestic and other in-kind
1.4 Submit and present (February–April 2016	the draft study reports to the	two governments		
1.5 Present and dissemin countries (April–June	nate the final report to key stake 2016)	holders of the two		
2. Strategic frameworks and the Kyrgyz Republic	for industrial park developme c developed	nt in Kazakhstan		
development and ide	e on the strategic frameworks ntify potential areas of technical ded in future strategic framewo	cooperation to be		
	e the strategic frameworks for Ka gust 2016–April 2017)	azakhstan and the		
2.3 Develop a list of TA p July 2017)	roject proposals in selected indu	strial parks (April–		
the concrete TA and (July–September 201	tion workshop on the strategic fra project proposals on industrial pa 7)			

ADB = Asian Development Bank, CAREC = Central Asia Regional Economic Cooperation, GDP = gross domestic product, TA = technical assistance, TASF = technical assistance special fund, UNIDO = United Nations Industrial Development Organization. ^a The 2012 baseline value is calculated from weighted average of nine CAREC countries (excluding the People's

Republic of China).

Source: Asian Development Bank.

COST ESTIMATES AND FINANCING PLAN

(\$'000)

Item	Amount
Asian Development Bank ^a	
1. Consultants	
a. Remuneration and per diem	
i. International consultants	340.0
ii. National consultants	96.0
 International and local travel 	40.0
c. Reports and communications	15.0
2. Training, workshops, seminars, and conferences ^b	160.0
3. Surveys and field visits	30.0
4. Miscellaneous administration and support costs	5.0
5. Contingencies	64.0
Total	750.0

Note: The technical assistance (TA) is estimated to cost \$0.75 million, of which contributions from the Asian Development Bank are presented in the table above. The concerned governments are expected to provide counterpart support in the form of administrative support for meetings, workshops, coordination and logistics, and other in-kind contributions.

Financed by the Asian Development Bank's Technical Assistance Special Fund (TASF-V).

^b 5% will be allocated for representation costs and the resource persons engaged in these activities may be ADB staff.

Source: Asian Development Bank estimates.

OUTLINE TERMS OF REFERENCE FOR CONSULTANTS

1. **Strategy formulation and policy planning expert**—team leader (international, 9 person-months, intermittent). The expert will develop the strategic frameworks for industrial park development in Kazakhstan and the Kyrgyz Republic (output 2). She or he should have significant experience in strategy formulation and policy planning for national industry development. He or she should be familiar with the key factors that governments should take into account when planning industry development. The expert will

- (i) review the background studies conducted for Kazakhstan and the Kyrgyz Republic industrial park development;
- (ii) draft an outline of the envisaged strategic frameworks for industrial park development for these two countries and identify issues that require further consultation with the governments and nongovernment stakeholders;
- (iii) interview the key government agencies and nongovernment stakeholders regarding the pending issues;
- (iv) develop the strategic frameworks for Kazakhstan and the Kyrgyz Republic, delineating the main barriers to successful industrial park development in each country;
- (v) develop effective guidelines to implement the strategic frameworks to transform existing industrial parks and make them more inclusive and sustainable, and to develop the planned industrial parks using inclusive and sustainable industrial development principles; and
- (vi) present the strategic frameworks to the governments and nongovernment stakeholders and solicit their feedback for further improvement.

2. **Industrial park development expert** (international, 8 person-months, intermittent). The expert will conduct background studies to identify the outstanding issues related to industrial park development in Kazakhstan and the Kyrgyz Republic and thereby lay a solid foundation for the development of the envisaged strategic frameworks (output 1 and activity 2.2 under output 2). The expert will

- (i) review existing reports and studies that directly or indirectly relate to industrial park development in Kazakhstan and the Kyrgyz Republic;
- (ii) review the policies and regulations on industrial park development and planning in Kazakhstan and the Kyrgyz Republic;
- (iii) conduct interviews on the status quo of the existing and planned industrial parks in the two pilot countries with key government agencies, city administrations, and nongovernment stakeholders, including industrial associations, trade unions, private sector, academia, and civil society;
- (iv) provide an overview of the global trends in and regional context of industrial park development;
- (v) undertake an analysis of the relevant cities and industrial parks to clarify how cities benefit from an industrial corridor;
- (vi) examine the merits of linking industrial park development with the development of regional logistics centers and multimodal corridor networks;
- (vii) analyze the challenges and opportunities of industrial park development by focusing on hard infrastructure, related service development, and institutional and legal frameworks;
- (viii) identify adaptable models of industrial park development for these two countries that would help lead to their integration into the regional value chain, as well as map their participation in regional and global value chains;

10 Appendix 3

- (ix) come up with some recommendations and a formulation of a list of technical assistance project proposals in selected industrial parks, based on the national needs and potential;
- (x) present the report to the government and key stakeholders to seek their feedback on where, when, and how the studies could be improved; and
- (xi) help develop the strategic frameworks for industrial park development in Kazakhstan and the Kyrgyz Republic.

3. **Industrial park development specialist** (two positions national, 12 person-months each, intermittent). The two country-based industrial park development specialists will provide necessary support and inputs to the industrial park development expert and the strategy formulation and policy planning expert in the course of their respective assignments (outputs 1 and 2). The national consultants will

- (i) assist the two international consultants in reviewing the relevant studies, national policies, and regulations related to industrial park development;
- (ii) help collect and verify data needed for the two outputs;
- (iii) assist the two international consultants in arranging and conducting interviews with key government officials and key nongovernment stakeholders;
- (iv) provide inputs and comments for the background studies and strategic frameworks;
- (v) assist in the conduct of the inception mission workshop, coordination meetings, consultation roundtables, and dissemination workshops;
- (vi) help prepare the meeting reports and other relevant documentation; and
- (vii) provide necessary support to the team leader.

4. **Resource persons** (10 person-assignments). Resource persons may be engaged to help develop and conduct knowledge-sharing activities. The resource persons will work closely with ADB staff members in preparing specific material and presenting it at workshops and other related capacity-building events. These resource persons may also be ADB staff.