

项目管理系列教材

英汉—汉英对照

项目管理词语精选

卢有杰 吴之明 编

清华大学出版社

<http://www.tup.tsinghua.edu.cn>

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内 容 简 介

本书汇集了现代项目管理文献中的常见概念、词汇和术语,用英汉两种文字加以解释和说明。其内容涉及经济学、工程、管理学、财政、金融、会计、外贸、法律、保险和系统工程等多个方面,基本上反映了现代项目管理丰富多彩的内容。

本书可帮助志趣高远的项目管理人员开阔知识视野,有利于提高阅读、理解、翻译和撰写项目管理以及其他有关文献的能力。

凡读者,不独项目管理人士将惊喜地发现本书收入的条目大不同于其他辞书,有些条目虽似曾相识,但本书给出的解释却更具体,更详尽。

大多数条目行文简洁,无冗长拖沓之累。读者可随身携带,偷闲浏览,日积月累,定能扩充知识兼提高英文水平。

本书适合各行各业项目管理人员、学生、教师、政府工作人员和其他有兴趣者阅读。

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序

在国民经济微观活动中,有很大一部分是属于有事先设定结束日期的一次性项目,如工程建设、农业技术推广、软件开发、科学研究、技术培训、影视创作、设立新服务、研制新产品、处理突发事件等。国民经济各部门都有大量的项目活动。有些组织,其业务活动主要采取项目的形式,如工程设计和施工、软件开发等。

一个项目,从选定、可行性研究、规划、评估、审核、准备、组织、实施,直到完成是一个整体过程。大型项目对于一个国家的经济增长和发展有重要的影响,例如京九铁路、三峡水利枢纽工程等;而大量的中小型项目更是与国民经济和人民生活休戚相关。

为了实施有效的项目管理,单凭人们一般的办事经验是不行的。关于项目管理,国内外已经在实践中总结出了一套系统的理论、原则、方法和技术。

项目管理就全世界而言不但已发展成为一门独立的学科,而且在一些发达国家和地区还成了一种职业。项目管理人员,特别是项目经理可以像教师、建筑师、工程师、医生、会计师、律师等一样以自己的项目管理知识、技能和经验立足于社会,服务于社会。

我国自1980年5月恢复在世界银行的合法席位以来,同世界银行发展了良好的合作关系。到目前为止,我国从世界银行的贷款总额已经累计281亿美元,平均每年30亿美元。贷款项目总数已达185个。如何管好这些项目,成了我国政府和世界银行双方关注的问题。

1994 年财政部世界银行司和世界银行协议委托清华大学和世界银行经济发展学院举办项目管理师资培训班。在此基础上, 1995 年 12 月成立了项目管理培训网。该网包括清华大学、天津大学、同济大学、上海财经大学和西安交通大学, 清华大学为负责单位。

项目管理培训网是利用世界银行机构发展基金(IDF)赠款及相应的国内配套资金而创立的。其宗旨是结合我国实际对项目骨干管理人员进行现代项目管理知识和能力的培训, 提高我国项目管理的水平。

为使培训工作步入正轨、提高质量, 项目管理培训网决定编写项目管理系列教材。在财政部世界银行司技术援助处的主持下, 于 1996 年末组织了编写组, 主编: 卢谦, 副主编: 吴之明、夏健明, 编委: 卢有杰、王雪青、陈建国、刘新梅、李淑红、曹淑贞。编写组讨论、确定了教材书目和内容提纲, 并组织了对书稿的审定。

这套系列教材从项目业主对项目全过程进行管理的角度编写, 不同于针对建设项目承包商的项目经理和监理工程师的培训教材。编写时力求联系我国现实, 符合国际惯例, 反映项目管理领域最新发展, 使之有较广的应用范围。我们希望, 这套教材不仅能够提高我国项目管理水平方面发挥重要作用, 而且也能够引起其他各方面人士的兴趣。

本书能与读者见面, 特别要感谢财政部世界银行司提供的指导和帮助, 感谢世界银行的资助, 也要感谢世界银行经济发展学院的大力支持。

项目管理系列教材编写组

1998 年 3 月

前言

我国的项目管理无论是在应用范围、重视程度,还是在水平上,距离世界先进水平都还很远。我们要培养新一代项目管理人员,需向发达国家和地区学习,与之交流和切磋。世界上英文项目管理文献很多,有专门的杂志介绍、讨论和研究。然而,国内现有的一般辞书不能对其中的一些词语提供令人满意的解释。国外的项目管理辞书,也由于种种原因不适合我们的需要。编写这本《英汉-汉英对照项目管理词语精选》,就是企望有助于解决这一问题。

本书中条目的来源有两个。一是作者从事项目管理教学和研究过程中的积累,二是专为编写本书从有关文献中查找而来。

书中大多数词汇和短语都有英汉两种文字的释义和解释,少部分给出示例(放在两个斜杠之间),便于读者在实践中能联系上下文,正确理解词语的含义。作者深感应当将文献中的定义、解释或有关段落原样(必要时略加修改)奉献给读者。其理显然:英语词汇和短语的含义,多因场合而异,难以直译成通俗易懂之汉文。若仅仅给出汉文释义不但不能达义,有时反生误解。更何况有些于汉语之中并无与之对应者呢!为此,作者尽力搜寻于英美项目管理文献之间,以便向读者提供这些词汇和短语尽可能多的含义和用法例证,使之不但能够正确地理解,而且还能与国外同行交流时正确地使用。由于大多数词汇和短语,都有英文解释,因此不熟悉项目管理的读者在浏览之后也可了解项目管理之大概。书中有些词语,虽不属必要,但为正人视听而选入。而另外

一些,若为“系统”或“完整”故,似应收入本书,但因本书篇幅受到限制,故凡是可在书末参考文献 9 和 10 中查到者,皆弃之不选。

还有一点须向读者交代,由于项目管理涉及经济学、工程技术、管理学、财政、金融、会计、外贸、法律、保险、系统工程等多方面知识,而作者知识和精力皆有限,要在不足两年的时间内收齐囊括上述所有方面之词语实不可能。故此,作者只能于浩如烟海的文献中择其要者而录之。

我们希望本书成为阅读和写作项目管理文献之参考,初涉项目管理者读物之补充。这两个目的若能达到些许,则作者之愿足矣。

本书初稿由卢有杰成于 1997 年夏,吴之明校核,并补充若干条目。1999 年秋于删除部分条目后定稿。卢有杰于 2000 年 8 月和 2001 年 2 月在责任编辑建议下再做修改。

书中译文仅供参考。凡遗漏、不确,甚至谬误之处,望读者指出、批评和改正。

卢有杰、吴之明

辛巳春识于清华园

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项目管理词语正文

A

abandonment 委付

The insured surrenders ownership of the property covered by insurance to the insurer. 投保人放弃投保的财产所有权,将其交给承保人。

absolute advantage 绝对优势

The advantage in the production of a product enjoyed by one country over another when it uses less resource to produce that product than the other country does. 一国因生产某种产品耗费的资源比另一国少而对后者具有的优势。

accelerated depreciation 加速折旧

A provision of tax law that allows firms to write off against profits the full cost of a piece of equipment or a new building according to a certain formula within a period that is shorter than the actual useful life of that equipment or building. 税法的一条规定,允许公司根据盈利情况在比实际使用寿命短的期间内将设备或建筑物的全部成本按照一定的公式注销。

acceptance certificate 验收证书,合格证书

access 获得,取得,接近(或进入)的方法(或权利、机会等)

/The project team must have access to an appropriate set of technical skills and knowledge. 项目班子必须能够取得一套适当的技能和知识。/

access to data 使用资料(的权利),查阅资料(的权利)

access to market 进入市场(的机会)

accessibility 接近(或进入)的可能性(条件,状况等)

/The description should include ... the site location and information as to its accessibility. ... 说明中应有……,现场位置及有关其进出交通条件的资料……/

accommodation 通融,和解

1. Financially, a settlement or adjustment. 财务上的结算或调整。
2. Attempt of one person or group to appease another. 一人或一组人向另一人或另一组人让步的企图。
3. A money policy that the Fed allows supply of money to grow at a rate sufficient to take into account inflation and real growth. 美国联邦政府允许在充分顾及物价上涨和国民经济实际增长速度的条件下增加货币供应的一种货币政策。

accountability 尽责能力,责任透明度,述职要求,(工作,公务,账目,责任)能够向(有关方面)交代清楚的一种(情况、状态、性质),对有关方面的要求和希望给以满足的态度和能力,问责性

1. A requirement under which members of an organization render a report on the obligation imposed by law or lawful order or regulation on an office. 对组织成员提出的一项要求,要求他们根据有关公职的法律或有法律效力的命令或法规的规定就其必须履行的义务提交一份报告。
2. The condition of being answerable for one's actions—or lack of action; the state of being totally answerable for the satisfactory completion or discharge of responsibilities, judged on the basis of a specific assignment. 对个人行动或未行动的原因或理由能够给予回答的状态;对责任的圆满完成或履行的原因或理由完全能够给予回答的状态。

/A third objective mentioned earlier is accountability, defined as the ability of service providers to serve the interests of users and other financiers. Competitive markets meet this criterion of accountability in that the profit-oriented suppliers have an incentive to satisfy demands of their customers (and it is customers who provide the revenues). Where competitive markets cannot be used to provide infrastructure services, other arrangements have to be found to promote accountability. 前面提到的第三个目标是尽责能力,其定义是服务提供者为用户和其他投资者利益服务的能力。竞争的市场符合这点要求,

因为以赢利为目的的供应者有满足其顾客要求的积极性(正是顾客为供应者提供了收入),在不能利用竞争的市场提供基础设施服务时,必须设法找到其他办法改善对用户的尽责能力。/

/This framework is based on the premise that the choice among institutional arrangements should be based on the objectives of promoting efficiency, equity (fair access), and accountability (responsiveness to users and other financiers) in the supply of infrastructure services. 该框架的前提是在各种制度安排之间所做的选择应以促进基础设施服务的效率、公平(平等的使用权)和透明度(对用户和投资者提出的要求及时采取措施给予满足)为目标。/

/Accountability to customers is the motivation and flexibility to adapt production to changing markets and to achieve better service quality and customer satisfaction. 对顾客的透明度是指使生产适应市场变化、改善服务质量以及使顾客更满意的主动性和灵活性。/

Accountability/responsibility matrix 责任分派矩阵

A structure that relates the project organization structure to the work breakdown structure to help ensure that each element of the project's scope of work is assigned to a responsible individual. 表示项目组织结构同工作分解结构关系的结构,以便确保项目范围内工作每一部分均已分派到负责的个人。

accountable 有说明与解答义务的,负责的,应(向有关方面)交代的,能够负责的

/Answerable to a superior element of management for the satisfactory discharge of assigned responsibility. 能够向上层管理人员解释清楚圆满履行其指定责任的过程。/

/Team development on a project is often complicated when individual team members are accountable to both a functional manager and the project. 当项目班子成员个人同时对职能部门负责人和本项目负责时,项目班子建设常常难以进行。/

/Competitive markets are both the most efficient mode of supply and most accountable to users' needs. 竞争的市场既是最有效的供应模式,又最能满足用户的各种要求。/

accounting criteria 会计准则

Standard accounting procedures, which include: record direct costs on a

consistent basis, summarize costs into organization, record indirect cost, and identify basis for allocating costs of apportioned effort; accounting must facilitate performance measurement. 标准的会计程序, 包括: 始终前后一致地记录直接成本、系统地归纳各种成本、记录间接成本、并确定按照投入比例分配成本的根据; 会计核算必须有助于绩效考核。

accounting cycle 会计循环

The sequence of accounting procedures starting with journal entries for various transactions and events and ending with the financial statements or, perhaps, the post-closing trial balance. 由会计程序组成的序列, 从在日记账上登录各种交易和事项开始, 到编制财务报表结束。此外, 还可能编制结账后的试算表。

accounting exposure 会计核算风险

The change in the value of a firm's or a project's foreign-currency-denominated accounts due to a change in exchange rates. 公司或项目用外币记载的账面价值由于汇率变化而引起的变动。

accounting period 会计期间

This is the interval between successive entries in an account. In project analysis, the accounting period is generally a year, but it could be any other convenient time period. 账目上接连两次分录之间的时间间隔。在项目分析中, 会计期间一般是一年, 但也可以用任何其他便于使用的的时间间隔。

accounting price 核算价格, 账面价格

The terms "shadow price," "accounting price," and "economic value" basically have the same meaning in project economic analysis. See *shadow price*. 在项目国民经济分析中, 影子价格、核算价格和经济价值这三个术语的意义基本相同。见影子价格。

accounting principles 会计原则

The methods or procedures used in accounting for events reported in the financial statements. This term tends to be used when the method or procedure has been given official authoritative sanction by a pronouncement of a professional group. 说明财务报表各个事项时使用的方法和程序。会计原则这一术语一般仅在某专业团体正式批准这些方法和程序之后使用。

account party 开证申请人

In a commercial letter of credit, the party instructing the bank to open a letter of credit and on whose behalf the bank agrees to make payment. In most cases, the account party is an importer or buyer, but alternately, may be a construction contractor or a supplier bidding on a contract. 在商业信用证中指示银行开立信用证,而银行愿意代其付出款项的一方。大多数情况下,开证申请人是进口商或买方。然而,在其他情况下,开证申请人也可以是承建商或者为某合同投标的供应商。

accrual accounting/accrual basis accounting/accrual basis of accounting 权责发生制会计,应收应付制会计

A method of recording accounting transactions that records revenues in financial statements for the period during which the revenues are earned, or realized, and that records expenses in the period incurred, regardless of whether the corresponding cash transactions took place previously or subsequently. Distinguished from *cash basis accounting*. 记录账务交易的一种方法。此法将收入记录在其赚得或实现期间的财务报表中,对于费用则在其发生时就记录下来,而不管相应的现金交易是在以前还是以后发生,区别于现金制会计。

accrued expenses 应计费用

Expenses attributable to the current accounting period but whose settlement will not be effected until a subsequent period. 应该算在本会计期间但只有在下一会计期间才能结算的费用。

accrued interest payable 应计未付利息

Strictly, the portion of interest expense applicable to past accounting periods, but not yet paid or due for payment; commonly may include all interest payable due but not paid. 严格地讲,指应当算在过去各会计期间,但尚未支付或到期的那部分利息费用;一般可包括所有到期但尚未支付的利息,

accrued payable 应付款项

This is a payable that usually results from a passage of time. For example, salaries and interest accrue as time passes. 通常由于时间原因而产生的应付款项。例如,经过一段时间,就要支付工资和利息。

accrued receivable 应收款项

This is a receivable usually resulting from a passage of time. 通常由于

时间原因而产生的应收款项。

accrued taxes 应计税款

acid test/quick ratio 酸性试验比率

The ratio that measures the liquidity of a business firm. It can be calculated by dividing cash and near-cash items by current liabilities. 衡量公司资产流动性的比率。将现金和相当于现金的项目除以流动债务即可算得酸性试验比率。

activity 工序,工作,活动

An element of work performed during the course of a project. An activity normally has an expected duration, an expected cost, and expected resource requirements. Activities are often subdivided into tasks. 工序是项目进行过程中所实施的工作细目。工序一般都有预期的时间、预期的费用和预期的资源要求。各工序又常常细分成任务。

activity definition 工序定义

To identify the specific activities that must be performed to produce the various project deliverables. 工序定义就是明确和找出为交付项目的各种成果而必须进行的各种具体工作。

activity sequencing 工序排序

Identifying and documenting inter-activity dependencies. 工序排序就是找出工序之间的依赖关系,并写成书面文件。

actual cost of work performed (ACWP) 已完工作实际费用

Total costs incurred (direct and indirect) in accomplishing work during a given time period. ACWP is used in the earned value method of progress measurement. 在给定的时间内为完成工作而发生的全部直接和间接费用。测量项目进展的挣值法使用“已完工作实际费用”概念。

actual finish date 实际结束日期

The date work actually ended on an activity. (Note: in some application areas, the activity is considered “finished” when work is “substantially complete.”) 实际结束日期就是一项活动实际结束时的日期(有些领域,当工作“实质上”已完成时,即可认为活动“结束”)。

actual start date 实际开始日期

The date work actually started on an activity. 实际开始日期就是一道

工序实际开始时的日期。

actuals costs 实际费用

Actual costs are total costs incurred (direct and indirect) in accomplishing work during a given time period. Also called actual cost of work performed or ACWP. 实际费用是在给定的时间内因完成工作而发生的总的(直接和间接的)费用,又称“已完工作实际费用”。

adjudication 评判

The newest alternative dispute resolution in its embryonic stage. The idea behind adjudication is that a third party is appointed at the outset of the contract, in the capacity of a full time impartial adjudicator. The person chosen, appointed, and paid for by both parties to the contract, should closely follow progress and record events throughout the entire project period. In this way the adjudicator is in a much better position than an arbitrator, or even a mediator, to make an accurate and fair assessment of a situation. Also, it is very likely that potential disputes will be identified at an early stage and possibly averted. It is conceivable that adjudication may eventually become the method of alternative dispute resolution adopted for more and more building and civil engineering contracts; this could only prove beneficial for all those involved in construction industry. See also *arbitration*, *mediation*, *DRB*. 一种仍处于孕育阶段解决争议的方法。评判的指导思想是在合同的一开始就指定一个全时工作的第三方担任公正评判员。此人由合同双方挑选、任命和付酬。他应当紧跟工程进度,记录项目整个期间的所有事件。这样,评判员就能比仲裁员,甚至调解员更好地对事情的原委做出准确、公正的估计。另外,潜在的争议很有可能在其刚显露端倪时就被发现,得以尽早规避。可以预计,评判作为解决争议的方法最终会在越来越多的房屋和土木工程合同中采用,建筑业各方人士都将因此而受益。另见仲裁,调解,争端审查委员会。

adjustment costs 调整费用

The costs that a firm suffers when it changes its production level; the costs of selling machinery or buying new machines and the costs of letting people go or of hiring and training new employees, for example. 公司改变其生产水平时付出的费用:例如,出售机器或购买新机器的费用,以及裁员或者雇佣并培训新雇员的费用。

adjustment contingency 调整应急费

An adjustment contingency, often referred to as “fix it” money, is added to an estimate to account for the effort required for a theoretically completed project to reach a level acceptable to the client. Typical uses of these funds include: system debugging; faulty component replacement; parts and assembly rework; rewriting specifications, procedures and other documentation; re-testing; and preparation of ‘as-built’ drawings, if not included in the basic design estimate. An adjustment contingency percentage is determined from past performance. A record of the actual adjustment expense incurred on each completed project is maintained to establish an estimating data base which is applied as an average percentage of direct material, direct labor, other direct costs and overhead. 在估算中加入的调整应急费,常叫做“调理”基金,其用途是支付将理论上完成的项目调至业主能够接受的程度时需要的费用。这种资金的一般用途包括系统调试;更换零部件;零部件和组装件的返工;技术说明书、程序和其他文件的重新编写;重新试验以及设计概算中未考虑的竣工图编制。调整应急费系数是根据过去的经验确定的。每个已完项目发生的实际调整开销都留有记录,用以建立估算数据库。使用时可以百分比的形式乘上材料、人工和其他直接费以及管理费。

administrative closure 行政收尾工作

The project or phase, after either achieving its objectives or being terminated for other reasons, requires closure. Administrative closure consists of verifying and documenting project results to formalize acceptance of the product of the project by the sponsor, client, or customer. It includes collection of project records, ensuring that they reflect final specifications, analysis of project success and effectiveness, and archiving such information for future use. Administrative closure activities should not be delayed until project completion. Each phase of the project should be properly closed to ensure that important and useful information is not lost. 项目或项目的阶段在达到目标或因故中止时,要求做好收尾工作。收尾工作的内容是核查项目结果并整理成书面文件,以便发起人、业主或顾客对项目成果正式验收。收尾工作包括收集能确实反映最后技术要求的记录,对项目成功和有效之处的分

析,以及将这些资料存档以备后用。收尾工作的各项活动不得拖延到项目完成之后。项目每一阶段的收尾都要保证不丢失有用的重要资料。

advance 贷款,赠款,预付款,垫款

1. Money paid by one party to another in contemplation of the receipt of goods, services, or other assets, or in order to finance specific ensuing operations, which money must be accounted for in connection with such operations or returned. 一方支付给另一方的款项,指望收到商品、服务或其他资产,或者为以后的具体业务提供资金,这笔款项在这些业务中的用途事后必须交代清楚,或者将其归还。

2. To grant or give funds. 给予或赠予款项。

3. A type of lending whereby individual disbursements are not evidenced by notes, but by a agreement. A master agreement allows the borrower to receive advances without submitting individual promissory notes for each disbursement. 一种贷款方式,双方签订协议,允许借款方预支款项,不必每次支用款项时都提交期票。

advance payment(contract) 预付款

This is a payment to a contractor in anticipation of, and for the purpose of, performance under a contract or contracts. 期望承包商履行一项或多项合同而因此支付给承包商的一笔款项。

advance payment bond 预付款保函

This is a bond that secures the performance and the fulfillment of a contractual provision for the making of advance payments. 为确保履行和完成合同中关于支付预付款的规定而出具的保函。

advance payment guarantee 预付款保证书

An arrangement whereby a person employing a contractor makes funds available to the contracting party for purchase of equipment and organizational expense necessary to get the construction under way. 雇用承包商向其提供为开工而购买设备和支付组织开销时所需资金的一种安排。

advance loan for mobilization 动员预付款,进驻预付款,开工准备预付款

advised letter of credit 通知信用证

It is a commercial letter of credit whose authenticity has been verified by a bank, generally in the beneficiary's location. This bank then advises the beneficiary of the authenticity of the letter of credit, but