

**The Secretary General**

Barcelona, 25<sup>th</sup> November 2020

**Subject: CALL FOR TENDERS**

Dear Tenderer,

We are pleased to publish an open call for the provision of **DEVELOPMENT OF THE UCLG MASSIVE OPEN ONLINE COURSE: "LOCAL PUBLIC FINANCES ACROSS THE WORLD: A JOURNEY THROUGH THE WORLD OBSERVATORY ON SUBNATIONAL GOVERNMENT FINANCE AND INVESTMENT"**, ref. 002-2020. All information related to the purchasing procedure is contained in Annexes 1 and 2. We kindly recommend you to read it carefully and follow the instructions contained in these documents.

UCLG is the world organization representing local and regional governments. The contracting party in this tender will be the UCLG World Secretariat, based in Barcelona (Spain). The contract will be governed by Spanish law and the courts of Barcelona.

The principles of transparency, equal treatment and non-discrimination, proportionality and fair competition, publication and dissemination and free access will be respected by UCLG in this tender.

Yours sincerely,

**Emilia Sáiz**  
Secretary General

Documents attached:

- Annex 1: Technical Terms of Reference
- Annex 2: Contractual References



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**Ref. 002-20202 - Annex 1**

**TERMS OF REFERENCE FOR DEVELOPMENT OF THE UCLG MASSIVE OPEN  
ONLINE COURSE: “LOCAL PUBLIC FINANCES ACROSS THE WORLD:  
A JOURNEY THROUGH THE WORLD OBSERVATORY ON SUBNATIONAL  
GOVERNMENT FINANCE AND INVESTMENT”**

The following Terms of reference (ToR) defines the background, objectives, deliverables, structure, time schedule and specific requirements for the **production of the massive open online course (MOOC) “Local public finance: a journey through the World Observatory on Subnational Government Finance and Investment”**.

**1. BACKGROUND AND OBJECTIVES**

This MOOC will primarily build on the work of the World Observatory on Subnational Government Finance and Investment, a joint initiative of the Organisation for Economic Co-operation and Development (OECD) and UCLG, launched with the technical and financial support of several partners including the UN Capital Development Fund, the French Development Agency (AFD), the Council of Europe Development Bank (CEB) and the Development Partners Network on Decentralisation and Local Governance (DeLoG).

The World Observatory aims to improve knowledge on local finance and inform capacity-building and policy-making processes on fiscal decentralisation at the national, regional and global levels, through the production of accurate, updated and systematised information and data.

With these core objectives in mind, the MOOC on local public finance will serve as a vehicle for disseminating the findings of the World Observatory’s 2019 Report, which compiles and analyses information on subnational government structure and finance in more than 120 countries. The MOOC will also provide guidance for making the best use of the World Observatory’s website, which includes a database and data visualisation tools (<http://www.sng-wofi.org/>).

The MOOC on local public finance will be open to a wide audience, ranging from local public officers and UCLG members, to individual citizens interested in these issues, through academic researchers and development partners. It will provide them with keys to understanding the overall architecture of local public finance, fiscal decentralisation frameworks, institutional environments, as well as the main issues at stake for local and regional government finance in the different regional contexts.

The MOOC on local public finance will be available on the online UCLG Learning Platform, #LearningWithUCLG (<https://learningwith.uclg.org/>), upon free registration. It will be the second in a series of UCLG Learning MOOC, and the first dealing with a specific topic, i.e. local public finance.

Registrants to the course will have access to a variety of teaching and user-friendly materials: animated videos, recorded interviews with external guests, podcasts, infographics and plain texts. The MOOC will also provide several quizzes and a final evaluation to facilitate learning and ownership of the content for all course registrants.

## 2. DELIVERABLES

The consultant is required to **produce five types of outputs** that will lead to the production of a massive open online course on local public finance:

- **Animated videos:** the consultant is expected to produce a teaser video of less than one minute to promote the MOOC in social media and two animated videos of approximately 3 minutes each that will respectively introduce the course and present the website of the World Observatory on Subnational Government Finance and Investment. The videos will be produced based on a text written in English that will be provided to the consultant beforehand. The consultant will have to adapt the written text into a spoken script in good English.
- **Editing of recorded videos:** the consultant is requested to edit 6 interviews that will be recorded beforehand. Each interview will last approximately 2 min and will feature an external guest who will give an overview of a specific topic by answering 3 questions that will appear on the screen.
- **Podcasts:** the consultant is expected to produce 6 podcasts of approximately 7 minutes each. These podcasts will provide content for the following course sections: Part 1.1 on Own source revenue; Part 1.2 on Intergovernmental Fiscal Transfers; Part 2.1 on Economic categories of spending; Part 2.2 on Functional categories of spending; Part 3.1 on Donor grants; and ODA and Part 3.2 on Access to financial markets. Each podcast will be produced based on a text written in English that will be provided to the consultant beforehand. The consultant will have to adapt the written text into a spoken script in good English.
- **Infographics:** the consultant is requested to produce 6 infographics in a A4 format that will highlight the key takeaways of each section of the course. A text written in English with highlighted sentences will be provided to the consultant beforehand, to guide him/her on the information to be featured in each infographic. The infographics should be delivered in good English according to international publishing standards.
- **Exercises:** the course will include a total of 3 exercises (referred to as “Let’s practice” in the structure below) and a final test allowing participants enrolled in the course to self-assess their learning progress. The consultant is expected to provide support to the UCLG team in the formulation and layout of these exercises and final test.

The consultant will be hired by the Learning Department of UCLG’s World Secretariat, which will be responsible for the overall supervision of the expected outputs, in collaboration with UCLG Local Finance team.

All materials should be delivered entirely in good English. Video narration in Spanish and French, as well as design and formatting to Spanish and French should also be delivered.

## 3. STRUCTURE

The following describes the main components of the course, making a distinction between the items that will be carried out by UCLG (internal production) and the items to be delivered by the selected external consultant (products).

The course will be organised in five blocks, each consisting of 3 to 6 sub-divisions. The MOOC will have a **total duration of approximately 1.5 hours**.

## 1. INTRODUCTION

- A. Product 1. Teaser Video  of less than one minute to promote the MOOC on social media
- B. Internal production. Text of half a page on “**Aim and content of the course**” (*visible before enrolling in the course*)
- C. Product 2. Animated Video  of approx. 3 min. on “**Introduction and course presentation**”
- D. Product 3. Animated Video  of approx. 3 min. on “**Getting to know the website of the World Observatory**”

## 2. LOCAL GOVERNMENT REVENUES

- A. Internal production. Text of half a page on “Part 1: Local government revenues”
  - o *Summary: Introduction to the main sources of local and regional government revenues that will be presented throughout Part 1 of the course: these consist of own-source revenues and intergovernmental transfers.*
- B. Internal production. Text of 1.5 page on “**Part 1.1 Own source revenue**”
  - o *Summary: Subsection 1.1 presents the wide variety of own-source revenues as well as their implementation modalities, trends and implications. Taxes, user fees and charges and revenues from the management of public assets are the three main current sources of subnational government revenues. Land value capture mechanisms have a strong potential to significantly complement these resources.*

Product 4. Audio/podcast  of approx. 7 min. based on the 1.5-page text of Part 1.1

Product 5. Infographics highlighting the key takeaways of the 1.5-page text of Part 1.1

- C. Internal production. Text of 1.5 page on “**Part 1.2 Intergovernmental Fiscal Transfers**”.
  - o *Summary: Subsection 1.2 describes the different grants and subsidies accessible and transferred to local and regional governments by other tiers of government, principally the central government. These range from strict transfers dedicated to fund specific sectors, programmes or policies, to more flexible grants, as well as taxes collected at national or state level which are shared between different tiers of government.*

Product 6. Audio/podcast  of approx. 7 min. based on the 1.5-page text of Part 1.2

Product 7. Infographics highlighting the key takeaways of the 1.5-page text of Part 1.2

- D. Product 8. Video  of approx. 2 min. on a “Bonus subject”
- E. Product 9. Video  of approx. 2 min. on a “Bonus subject”
- F. Product 10. Interactive exercise based on the Observatory’s website “Let’s Practice”
- G.

## 3. LOCAL GOVERNMENT EXPENDITURE

- A. Internal production. Text of half a page on “Part 2: Local government expenditure”
  - o *Summary: Regardless of the sources mobilised to gather funds, local and regional government decide and approve new budgets every year to allocate their financial*

resources. This second part describes local public spending based on the two most commonly used classifications: economic and functional (or COFOG) classification.

- B. Internal production. Text of 1.5 page for "**Part 2.1 Economic categories of spending**".
- o *Summary: Subsection 2.1 presents the two complementary types of expenditure as described by an economic classification. The large categories are the following: on the one hand recurrent spending to finance (short-term) operational measures, and on the other hand, capital spending for longer-term investments in local infrastructure and services.*

Product 11. Audio/podcast  of approx. 7 min. based on the 1.5-page text of Part 2.1

Product 12. Infographics highlighting the key takeaways of the 1.5-page text of Part 2.1

- C. Internal production. Text of 1.5 page for "**Part 2.2 Functional categories of spending**".
- o *Summary: Subsection 2.2 presents the functional classification of public expenditure, namely the sectoral allocation of the budget. This classification allows the analysis of local and regional governments' priorities and responsibilities within their mandates, whether they relate to education, public order, economic development or housing, for example.*

Product 13. Audio/podcast  of approx. 7 min. based on the 1.5-page text of Part 2.2

Product 14. Infographics highlighting the key takeaways of the 1.5-page text of Part 2.2

- D. Product 15. Video  of approx. 2 min. on a "Bonus subject"

E. Product 16. Interactive exercise based on the Observatory's website "Let's Practice"

#### 4. EXTERNAL FINANCING

- A. Internal production. Text of half a page on "Part 3: External financing"
- o *Summary: The last part of this course is devoted to exploring other means of leveraging funding apart from intergovernmental transfers and own-source revenues, namely external financing from donors or from resources accessed on financial markets.*

- B. Internal production. Text of 1.5 page for "**Part 3.1 Donor grants and ODA**".
- o *Summary: Subsection 3.1 consists in going through the common sources of public or private, national or international channels for donations to local governments, aimed at funding current or capital expenditure, as well as emergency situations.*

Product 17. Audio/podcast  of approx. 7 min. based on the 1.5-page text of Part 3.1

Product 18. Infographics highlighting the key takeaways of the 1.5-page text of Part 3.1

- C. Internal production. Text of 1.5 page for "Part 3.2 Access to financial markets".
- o *Summary: Subsection 3.2 aims at understanding debt and equity, two mechanisms through which subnational governments can access resources from financial markets and investors to fund capital investment.*

Product 19. Audio/podcast  of approx. 7 min. based on the 1.5-page text of Part 3.2

Product 20. Infographics highlighting the key takeaways of the 1.5-page text of Part 3.2

- D. Product 21. Video  of approx. 2 min. on a "Bonus subject"

E. Product 22. Video  of approx. 2 min. on a "Bonus subject"

- F. Product 23. Video  of approx. 2 min. on a “Bonus subject”  
G. Product 24. Interactive exercise based on the Observatory’s website “Let’s Practice”

## 5. CONCLUSIONS

- A. Internal production. Text of approx. 2 pages of Conclusions  
B. Internal production. Annex with additional resources and links to publications  
C. Product 25. Final Quiz in a multiple-choice questions format  
D. Internal production. Feedback survey

## 4. TIME SCHEDULE

The provisional schedule is as follows:

- **Starting from 15 January 2021:** Reception of written texts of the different sections of the MOOC to be adapted into spoken versions for the animated videos and podcasts, and to be analysed to produce the infographics
- **Starting from 25 January 2021:** Reception of the recorded videos to be edited
- **No later than 22 February 2021:** First delivery of advanced material for the two animated videos and the editing of the recorded videos. Delivery of the podcasts and infographics of the first 3 sections (i.e. Part 1.1, Part 1.2 and Part 2.1).
- **No later than 5 March 2021:** Delivery of the final versions of the animated and recorded videos and delivery of the remaining podcasts and infographics.

## 5. COPYRIGHT AND DIVULGATION

UCLG holds intellectual property and has the right to use the final videos, texts, images and illustrations in future courses and publications as part of its learning agenda.

## 6. REQUIREMENTS

This tender is addressed preferably at professionals and/or companies with proven senior expertise in this field of service. Experience with the production of learning materials on local governance and local public finance will be strongly considered.

The total budget for the abovementioned tasks may not exceed **20,000 Euros** (VAT not included).

## 7. STARTING DATE OF THE CONTRACT

The Contract between UCLG and the awarded tenderer will begin on **21 December 2020**, and will last until **22 March 2021**.

## Annex 2      **CONTRACTUALLY-BINDING CONDITIONS**

Ref. Tender:      **002-2020**

<b>Publication date:</b>	25-11-2020	<b>Deadline for submitting tenders:</b>	16-12-2020 midnight GMT+1
<b>Document:</b>	<b>DEVELOPMENT OF THE UCLG MASSIVE OPEN ONLINE COURSE: "LOCAL PUBLIC FINANCES ACROSS THE WORLD: A JOURNEY THROUGH THE WORLD OBSERVATORY ON SUBNATIONAL GOVERNMENT FINANCE AND INVESTMENT"</b>		
<b>Name and address of the Contracting Authority:</b>	ORGANIZACION MUNDIAL DE CIUDADES Y GOBIERNOS LOCALES UNIDOS (UCLG) Avinyó 15, 08002 Barcelona (Spain) Tel: +34 933428750, Fax.: +34933428760 e-mail: tender@uclg.org		
<b>Short Description:</b>	<i>More information included in Annex 1</i>		
<b>Contract type:</b>	Services contract		
<b>Duration of the contract:</b>	3 months (December 2020-March 2021)		
<b>Procedure type:</b>	Open procedure		
<b>Budget:</b>	EUR 20,000.00		
<b>Language of the services and communication:</b>	English, French and Spanish		
<b>Language submission (preference)</b>	English, French and Spanish		
<b>Status:</b>	Open		
<b>Notification of award to the successful Tenderer:</b>	December 18 <sup>th</sup> 2020		

1) The contractor is responsible for implementing the task entrusted to it in the Terms of Reference (see Annex 1)

2) Legal aspects:

- UCLG may require information on the Tenderer to comply with their obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of its country.
- Following the notification of the successful bid, the Tenderer(s) to which the contract is to be awarded must supply evidence about fiscal residence in their country.
- The Tenderer and its staff must comply with human rights and undertake not to offend the political, cultural and religious mores of the country(ies) where the action is implemented. In particular, and in accordance with the applicable basic act,

tenderers who have been awarded contracts must comply with core labour standards as applicable and as defined in the relevant International Labour Organization conventions.

- Intellectual property originated by the successful Tenderer shall be the sole and exclusive property of UCLG.
- 3) Drafting and content of the tender documents to be submitted by the Tenderer. Tender documents must contain the following provisions and information:
- Description of the Tenderer (Organization, Expert, Consultant, Company, etc.) and the persons having powers of representation, decision-making or control.
  - Key experts and CVs, in the case of individuals involved.
  - Technical offer according to the requirements outlined in Annex 1.
  - Financial offer including indirect tax if applicable.
  - All financial identification information including the financial identification number. In a later phase of the contract drafting, the bank account details should be provided to UCLG.
  - Declaration that the Tenderer possess the economic, financial, professional and technical capacity in accordance with the mandatory requirements laid down in the tender documents.
- 4) The tenderer must certify on honour in their tenders that they are not in the following situations: bankrupt, subject to insolvency or winding-up procedures, established by a final judgment or administrative decision for misconduct, fraud, corruption terrorist financing or any other illegal activity.
- 5) The set of tender documents need to be sent to UCLG by e-mail to [tender@uclg.org](mailto:tender@uclg.org) no later than the date and time indicated in the deadline above. No Tenders will be accepted beyond the submission date, unless informed otherwise on the website.
- 6) In case additional information is required to submit the proposal, we kindly invite you to contact UCLG by writing to the e-mail address [tender@uclg.org](mailto:tender@uclg.org). Only relevant questions in writing concerning clarifications of the Tender will be answered.
- 7) Tenderers are entitled to withdraw their offer at any time.
- 8) UCLG might request additional information with relation to the proposal in the case of unclear concepts raised to UCLG. If this is the case, the Tenderers whose submissions require clarification will be asked to reply within a reasonable deadline set by the assessment team. If the Tenderer submits a self-declaration/statement as documentary proof, the contracting authority reserves the right to ask for further documentary evidence.
- 9) If UCLG suspects that a candidate, tenderer or applicant does not comply with the rules, it must ask the candidate/tenderer/applicant to provide evidence demonstrating actual compliance with the applicable rules.
- 10) Evaluation Criteria: UCLG will ensure that the awarded tenderer does not have a potential conflict of interest with the organization and will decide whether or not the submitted proposals:
- Comply with the essential requirements of the tender dossier: technical, administrative and financial.
  - Satisfy the requirements set out in the tender dossier.
  - Contain the complete documentation.
  - Use the correct language required in the tender dossier.

The selection criteria concern the Tenderer's capacity to execute the contract. The successful tenderer will be the applicant submitting the least expensive tender classified as 'technically compliant' during the evaluation.

**11)** The tenders will be assessed according to the eligibility and the financial, economic, technical and professional capacity of the tenderers. Tenders will be compared and the contract awarded. The decision of who is the successful tenderer will be final.

**12)** Choice of contractor:

As a result of its deliberations, UCLG will decide on the following recommendations:

- Awarding the contract to the tenderer that has submitted the least expensive offer and complies with the formal, technical, administrative and financial requirements.
- Cancelling the tender procedure.

Once the contract has been awarded, the successful tenderer will be notified.

**13)** Once the tenders have been analyzed, they are compared and the successful tenderer is chosen. No negotiation is allowed.

**14)** UCLG must ensure equal treatment of tenderers and keep the tenders confidential.

**15)** Candidates or tenderers must certify on honour in their tenders that they are not in any of the following situations: bankrupt, a final judgment or a final administrative decision that the tenderer is guilty of grave professional misconduct, that the information provided in the tender is not fraudulently or negligently misrepresenting, the tenderer is not entering into agreement with other economic operators with the aim of distorting competition, violating intellectual property rights; attempting to influence the decision-making process by UCLG, attempting to obtain confidential information that may confer upon it undue advantages in the procurement procedure, the tenderer fulfills its obligations relating to the payment of taxes or social security contributions in accordance with the applicable law, that the tenderer is not guilty of any of fraud, corruption, involvement in a criminal organisation, money laundering, terrorist financing, child labour (or any other forms of trafficking in human beings) or any other illegal activity, that the tenderer is not in the lists of persons, groups, entities subject to the EU restrictive measures published on the following website: [www.sanctionsmap.eu](http://www.sanctionsmap.eu).