

**The Secretary General**

Barcelona, 6<sup>th</sup> May 2019

**Subject: CALL FOR TENDERS Ref. 002-2019**

Dear Tenderer,

We are pleased to publish an open call to **provide services for English editorial correction and English proofreading for the GOLD V Report and the GOLD V Executive Summary with ref. 002-2019**. All the information related to the purchasing procedure is contained in Annexes 1 and 2. We kindly recommend you read it carefully and follow the instructions contained in these documents.

UCLG is the world organization representing local and regional governments and 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, publication and dissemination, free access, equality, competition, economy and fairness will be respected by UCLG in this tender.

Documents attached:

- Annex 1: Technical Terms of Reference
- Annex 2: Guide Style, Terminology, Glossary
- Annex 3: Contractual References

Yours sincerely,

**Emilia Saiz**  
Secretary General



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## Editorial correction and proofreading in English for the GOLD V Report and GOLD V Executive Summary

General context: UCLG and the Report of the Global Observatory on Local Democracy and Decentralization (GOLD)

- United Cities and Local Governments (UCLG) is the largest world organization of local and regional governments. Headquartered in Barcelona, UCLG's mission is "to be the united voice and world advocate of democratic local self-government, promoting its values, objectives and interests, through cooperation between local governments, and within the wider international community". UCLG is present in over 140 of the 191 UN Member States in seven world regions, its membership includes over 175 local and regional government associations, eventually representing at least 240,000 local authorities around the world. It comprises 17 committees and working groups.
- In line with our strategic objective to strengthen the voice of local and regional authorities at the international level, every three years UCLG publishes a Global Report facilitated by the *Global Observatory on Local Democracy and Decentralization* (GOLD). The next GOLD Report, the fifth edition (GOLD V), will explore in detail the process of localization and implementation at the local level of the Sustainable Development Goals (SDGs), part of the 2030 Agenda of the United Nations, as well as the other global development agendas approved by the international community over the past few years.
- The GOLD V Report must be published in time for the 6<sup>th</sup> World Congress of UCLG, which will take place in Durban, South Africa, on November 11-15, 2019. The document will be approximately 360-pages-long in its English version. It will be accompanied by a shorter publication, the *GOLD V's Executive Summary*, of about 60-70 pages.
- After the 2019 World Congress, UCLG will revise, adapt and update the Report, so that a revised and definitive version in English of the GOLD V report can be also published during the first semester of 2020.

### 1. Format of GOLD V: Full Report and Executive Summary

#### 1.1. The GOLD V Report

The GOLD V Report consists of seven regional chapters and thematic chapter on Metropolitan Areas, plus Introduction, Conclusions and Annexes. The structure of the document as a whole is as follows: approx. 360 pages (with a range of plus/minus 10%)

- **Introduction** [approx. 10 pages];
- A regional chapter on localization in **Africa** [approx. 50 pages];
- A regional chapter on localization in **Asia-Pacific** [approx. 50 pages];
- A regional chapter on localization in **Eurasia** [approx. 30 pages];
- A regional chapter on localization in **Europe** [approx. 50 pages];
- A regional chapter on localization in **Latin America** [approx. 45 pages];
- A regional chapter on localization in **Middle East and West Asia** [approx. 25 pages];
- A regional chapter on localization in **Northern America** [approx. 25 pages];
- A thematic chapter on localization in **Metropolitan Areas** [approx. 35 pages];
- **Conclusions** [approx. 25 pages]
- **Annexes, bibliography and covers** [approx. 15 pages]

#### 1.2. The GOLD V Executive Summary

The Executive Summary of the GOLD V Report, a summarized version for easier dissemination and communication, will also be edited. It is expected to consist of about 60-70 pages.

## 2. Objective

The objective of this Tender is to ensure editing and proofreading in English of the following publications:

- the **first full version** of the GOLD V Report (approx. 360 pages);
- the **Executive Summary** of the GOLD V Report (approx. 60-70 pages);
- the **final full version** of the GOLD V Report (approx. 360 pages).

## 3. Description of the work

### 3.1. Editorial correction and proofreading in English:

Due to the fact that large parts of the text have been written by non-native English speakers, and that the final text is the result of the merging of the work of different groups of analysts and experts, the tasks of editing and proofreading in the English language, in order to make all documents coherent and consistent, are particularly important.

**Accordingly, by editing and proofreading we mean:**

- **Edition:** Improving the phrasing and overall style of the text (revising grammar, syntax and vocabulary of the whole text, thereby including also paragraphs, boxes and visual media), with the aim of making the document more readable, helping highlight the key messages, avoiding repetitions in text and meaning, and reducing the document's extension (whenever possible), making the style consistent throughout the different parts of the Report, improving its overall coherence.
- **Proofreading:** Proofreading implies, once the edited documents are laid out in the definitive graphic format, that the final proofs (in PDF format) will have to be thoroughly revised to detect and avoid errors and inconsistencies. In accordance with time availability, a second round of proofreading on revised proofs may be desirable.
- **Referencing:** Referencing refers to the process of revising citation and quoting styles, ensuring coherence throughout the whole document for quotes, references, and bibliography (following, preferably, the *Chicago style of referencing with section endnotes* that was used in the previous GOLD Reports).

The overall style of the Report (both the "**first full version**" and "**final full version**") and the Executive Summary should be as similar as possible to those applied to the previous GOLD Reports and Summaries. All texts should be edited according to standard British English spelling (in its Oxford variation, i.e., always using the letter zed, "z", in -ize/-ization constructs). Further details are available in the GOLD Style Guide, developed according to the Observatory's past research work, annexed to this Tender.

## 4. Deliverables

- It is essential that the tendered editors maintain **constant communication and share the output of their work timely** with UCLG. The viability of the process depends on the collaboration of UCLG, the tendered editors and the graphic designers in charge of the layout: **frequent delivery of materials consistent with a reasonable time upon reception** of the drafts is essential to maintain the process running.
- The final edited documents – i.e., both the "first full" and "final full" versions of the Report plus the Executive Summary – must be delivered as **three individual documents** ready to be sent out directly for layout and formatting. Drafts (both original and edited) will be submitted in Word (.doc) file format. Proofs (both original and edited) will be submitted in PDF format.
- Each document must therefore be coherently edited, with a unified style, and proofread for typographic and orthographic errors and incoherencies.
- Names of countries and regions should be consistently normalized to the UN official terminology in force.
- The names of any agencies and international organizations, as well as any related references (in reports and other cited publications) should also fully respect the existing official UN terminology, or the nomenclature specific to each institution.
- All terminology used throughout the report (vocabulary, idioms, lexical and semantic fields) should refer to the standards set and used in previous Reports (GOLD I to IV) and therefore

comply with the official vocabulary and technical terminology of UCLG. A glossary and preferred terminology will be made available to awarded tenderers upon beginning of the collaboration.

- The layout should be revised in order to ensure the high-standard quality of the publication.

## 5. Calendar and important dates

### Phase 1: "First full version" of the GOLD V Report and Executive Summary

The GOLD V report will be launched officially at the UCLG World Congress of Durban, South Africa, on November 11-15, 2019. The timeline for the tasks object of this Tender should be set accordingly and is provisionally defined as follows:

By **June 2019**:

- The awarded tenderer/editor will begin receiving materials for editing since late June 2019 (the last documents being available to the editors no later than September 6, 2019).

No later than **September 18, 2019**:

- Delivery (by tendered editors) of the **last batch of edited documents** of all chapters and parts, although edited documents should be shared throughout the previous weeks upon completion.

No later than **September 30, 2019**:

- Delivery (to tendered editors) of the last batch of proofs for **proofreading** before printing.

No later than **October 7, 2019**:

- Delivery from the awarded tenderer of the final **"first full version" proofread batch of proofs** ready for printing.

### ➤ **Executive Summary**

Delivery schedule for the Executive Summary (approx. 60-70 pages) will run in parallel with the calendar of the full report. Introduction and Conclusions of the GOLD V report will be replicated in the Executive Summary.

**September 6, 2019**:

- Delivery (to tendered editors) of the last batch of drafts of the Executive Summary, although parts of the Executive Summary draft will be shared throughout the previous weeks.

No later than **September 18, 2019**:

- Delivery (by tendered editors) of the **last batch of edited documents** of the Executive Summary, although edited documents should be shared throughout the previous weeks upon completion.

No later than **September 30, 2019**:

- Delivery (to tendered editors) of the last batch of proofs of the Executive Summary for **proofreading** before printing.

### Phase 2: "Final full version" of the GOLD V Report

Following presentation at the UCLG Congress in Durban, the contents of the GOLD Report might receive minor edits or revisions. Proofreading and layout of **this revised English version** will be performed during the **first semester of 2020**. The final full version of the GOLD V Report in English **will be published before July 1, 2020**.

## **6. Application Requirements and Proposal Submission**

This tender is addressed preferably at companies (or professionals) with proven senior expertise in this field of service. Experience with publications in the field of local government, public advocacy and public policy will be strongly considered.

Tenderers are required to submit as many references as possible for similar awarded works.

## **7. Budget**

The successful tenderer will be the one submitting the least expensive tender classified as 'technically compliant' during the technical evaluation. Maximum available budget is EUR 35,000 (all taxes included).

## **8. Payment terms**

UCLG will sign a Contract with the awarded tenderer covering all the binding conditions governing the relationship and the object of the Tender. Payment terms will be:

- 10% of the accepted budget will be paid at the reception of the three first chapters of the "first full version" in accordance with Point 5.
- 20% of the accepted budget will be paid at the reception of the following three chapters of the "first full version" in accordance with Point 5.
- 50% of the accepted budget will be paid 30 days after the submission of the final "first full version" and the Executive Summary, in accordance with Point 5.
- 20% of the accepted budget will be paid 30 days after the submission of the "final full version", in accordance with Point 5.

## **9. Starting date of the Contract**

The Contract between UCLG and the awarded tenderers will begin on **June 10<sup>th</sup>, 2019**, and will last until August 10<sup>th</sup>, 2020.

## Annex 2. Guide Style, Terminology, Glossary

# GOLD V – Localizing the SDGs

## Style Guide for the submission of Regional Reports

### General considerations

GOLD V is expected to be published in 2019. It will be the result of a strong coordination effort among several research and expert teams from all regions of the world. In order to preserve the consistency of the final output without compromising the narrative, the scientific rigour and the political validity of the various texts to be submitted, the GOLD team at the UCLG World Secretariat suggests the following **style guidelines** for the drafting of the regional reports. The same will of course be adopted for the general structure of the report as well. The guidelines touch primarily on three issues: text structure; editing; and referencing and bibliography.

### Editing

The text should be drafted in publishable English, according to British spelling rules (e.g., colour, centre, programme) with a preference for -ize/-ization options (localization; globalize). Consistency in this regard will be essential to streamline the editing, proofreading and publishing processes for the whole report. Please:

- use "double quote marks" for literal quotes from referenced works;
- use 'single quote marks' for definition or specific terms to be highlighted;
- write numbers from 1 to 9 always in letter (one, two, ...) and from 10 up only in numbers; write measurements and data always in numerals (*there are three ways* but also *a city of 3 million people*);
- do not hyphenate common compounds: multilevel, multinational, macroeconomic, etc.

Attached to this document you will find a **terminology guide** developed for GOLD reports and publications. The document attempts at solving any potential doubts related to the use of certain technical or specific terminology commonly used in GOLD works (orthography, ambiguous forms, compounds, acronyms, etc.).

### Referencing and bibliography

For UCLG and GOLD, it is of the utmost importance that all published material respects key criteria of academic and publishing rigour and compliance. For this reason, **it is ABSOLUTELY ESSENTIAL that all reports adequately cite and attribute any material from external sources they use or refer to.**

GOLD Reports adopt a simple **Chicago Manual of Style (note)** model (17<sup>th</sup> edition), meaning that all references should appear in **endnote** at the end of the document. Please use the following example as a general rule:

The relevance of sub-national territorial units in development policy has increased significantly in past decades, partly as a consequence of globalization processes that have accentuated and galvanized their centrality.<sup>1</sup>

<sup>1</sup> Smoke, 'Decentralisation in Africa'; Pike, Rodríguez-Pose, and Tomaney, *Local and Regional Development*; UCLG, *Decentralization and Local Democracy in the World*; UCLG, *Local Government Finance*; Rodríguez-Pose, 'Economists as Geographers and Geographers as Something Else'; Barca, McCann, and Rodríguez-Pose, 'The Case for Regional Development Intervention'.

#### **And in the list of reference:**

Barca, Fabrizio, Philip McCann, and Andrés Rodríguez-Pose. 'The Case for Regional Development Intervention: Place-Based versus Place-Neutral Approaches'. *Journal of Regional Science* 52, no. 1 (February 2012): 134–52. <https://doi.org/10.1111/j.1467-9787.2011.00756.x>.

Pike, Andy, Andres Rodríguez-Pose, and John Tomaney. *Local and Regional Development*. Abingdon, Oxon: Taylor & Francis, 2006.

Rodríguez-Pose, Andrés. 'Economists as Geographers and Geographers as Something Else: On the Changing Conception of Distance in Geography and Economics'. *Journal of Economic Geography* 11, no. 2 (1 March 2011): 347–56. <https://doi.org/10.1093/jeg/lbq034>.

Smoke, Paul. 'Decentralisation in Africa: Goals, Dimensions, Myths and Challenges'. *Public Administration and Development* 23, no. 1 (February 2003): 7–16.  
<https://doi.org/10.1002/pad.255>.

UCLG. *Decentralization and Local Democracy in the World, 2008*. Washington, D.C.: The World Bank, 2009.

———. *Local Government Finance: The Challenges of the 21st Century*. Cheltenham: Edward Elgar, 2011.

### ANNEX 3 Contractual Binding Conditions

**Ref. Tender: 002 -2019**

<b>Publication date:</b>	06-05-2019	<b>Deadline for submitting tenders:</b>	30-05-2019 18:00
<b>Document:</b>	<b>ENGLISH Editorial correction and proofreading for the GOLD V Report and the GOLD V Executive Summary</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 e-mail: tender@uclg.org		
<b>Short Description:</b>	<p>Every three years UCLG publishes a Global Report called <i>Global Observatory on Local Democracy and Decentralization</i> (GOLD, with the English acronym). The next GOLD Report, the fifth one, will present the <i>Global Agenda of Local and Regional Governments for the 21<sup>st</sup> Century</i>. The Report should be published in time for the 6<sup>th</sup> World Congress of UCLG, which will take place in Durban (11-15 November 2019). The document will be approximately 350-pages-long in its English version. It will be accompanied by a shorter publication, called <i>Executive Summary</i>, of around 80-90 pages, that will be published in English, French and Spanish Due to the fact that large parts of the text have been written by non-native English speakers, and that the final text is the result of the fusion of the work of different groups of analysts and experts, the tasks of editing and proofreading, in order to make all the documents coherent and consistent, are particularly important.</p> <p><i>More information included in Annex 1</i></p>		
<b>Contract type:</b>	Services contract		
<b>Duration of the contract:</b>	14 months		
<b>Procedure type:</b>	Open procedure		
<b>Budget:</b>	Maximum budget EUR 35,000.00 (all taxes included)		
<b>Language of the services and communication:</b>	English		
<b>Language submission (preference)</b>	English		
<b>Status:</b>	Open		
<b>Notification of award to the successful tenderer:</b>	Up to 7 days after deadline for tenders		



- 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 be in compliance 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 Organisation conventions.
  - Intellectual property originated by the awarded 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 case individuals involved.
  - Technical offer according to Annex 1 requirements.
  - Financial offer including indirect tax if applicable.
  - All the financial identification information including the financial identification number. In a later phase of the contract drafting, the bank account details will be provided to UCLG.
- 4) The set of tender documents need to be sent to UCLG no later than the date and time indicated at the deadline set up above by e-mail to: [tender@uclg.org](mailto:tender@uclg.org). No tender offer will be accepted beyond the submission date, unless informed otherwise on the website.
- 5) In case additional information is required to submit the proposal, we kindly invite you to contact UCLG in the e-mail address [tender@uclg.org](mailto:tender@uclg.org). Only relevant questions in writing concerning clarifications of the Tender will be answered
- 6) Tenderers are entitled to withdraw their offer at any time.
- 7) UCLG might request additional information of the proposal in 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.
- 8) 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.
- 9) Evaluation Criteria: UCLG will take care 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 in the tender dossier
  - Contains the complete documentation
  - Language required by the tender dossier has been used

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

**10)** 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.

**11)** Choice of contractor:

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

- Award the contract to the tenderer which has submitted the least expensive offer and complies with the formal, technical, administrative and financial requirements
- Cancel the tender procedure:

Once award of the contract the successful tenderer will be notified.

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

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