

**The Secretary General**

Barcelona, 25<sup>th</sup> May 2016

**Subject: CALL FOR TENDERS**

Dear Tenderer,

We are pleased to publish an open call to **provide services for editorial correction and proofreading for the GOLD IV Report and the GOLD IV Executive Summary** with **ref. 004-2016**. 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.

Yours sincerely,

Documents attached:

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

Yours sincerely,



**Josep Roig**  
Secretary General



Carrer Avinyó, 15  
08002 Barcelona (Spain)  
Tel. +34 933 428 750

Fax +34 933 428 760  
info@uclg.org  
www.uclg.org



**Ref. 004-2016 - Annex 1**

**Terms of reference for editorial correction and proofreading for the GOLD IV Full Report and the GOLD IV Executive Summary**

**1. 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”. Present in 140 of the 191 UN Member States in seven world regions, UCLG’s members include over 1000 cities across 95 countries, as well as 112 Local and Regional Government Associations (LGAs and RGAs), and 17 committees and working groups – organizations that represent cities and local governments at national level within a given country and at continental level (through Regional Sections in each continent) – meaning that UCLG represents almost every LGA in the world.
- 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 called *Global Observatory on Local Democracy and Decentralization (GOLD*, with the English acronym). The next GOLD Report, the fourth one, will present the *Global Agenda of Local and Regional Governments for the 21<sup>st</sup> Century*.
- The Report should be published in time for the 5<sup>th</sup> World Congress of UCLG, which will take place in Bogotá (12-15 October 2016). The document will be approximately 350-pages-long in its English version. It will be accompanied by a shorter publication, called *Executive Summary*, of around 80-90 pages, that will be published in English, French and Spanish.
- After the Congress in Bogotá, UCLG will revise the Report. The new version of the full Report should be published in the three languages during the first semester of 2017.

**2. Format of GOLD IV: Full Report and Executive Summary**

**2.1. The GOLD IV full Report**

The GOLD Report IV will consist of five main chapters, plus annexes.

The five parts are organized as follows:

- An introduction, 10-15 pages;
- A chapter on Metropolitan areas, 85-95 pages;
- A chapter on Intermediary Cities, 85-95 pages;
- A chapter on Territories (regions, small towns and rural areas), 85-95 pages;
- A conclusion, 35-40 pages;
- Annexes and Covers, 10-15 pages.

## 2.2. The GOLD IV Executive Summary

As a summarized version, the Executive Summary of the Report will also be edited, and consist of about 80-90 pages.

## 3. Objective

### 3.1. The objective is to ensure the editing and proofreading of the following publications:

- the Full First Version of GOLD IV Report (300-350 pages).
- the Executive Summary of GOLD IV (80-90 pages).
- the Full Second Version of GOLD IV Report (300-350 pages).

### 3.2. **Editorial correction and proofreading:**

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.

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

- **Edition:** Improving the phrasing and overall style of the text, 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:** revising grammar, syntax and vocabulary of the whole text, thereby including also paragraphs, boxes and visual media (maps, charts, graph and graphics), according to standard British English spelling (in its Oxford variation, i.e., always using the letter zed, "z", in -ize/-ization constructs).
- **Referencing:** revise the 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 and second full versions) and the Executive Summary should be as similar as possible to those applied to the previous GOLD Reports and Summaries.

**The editor should also assist the UCLG staff in the first revision of the layout.**

## 4. Deliverables

- The final proofread documents – i.e., both the first and second 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.
- 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 1, 2 and 3) and therefore comply with the official vocabulary and technical terminology of UCLG.
- The layout should be revised in order to ensure the high-standard quality of the publication.

## 5. Calendar and important dates

### Phase 1: First version of the Full Report and Executive Summary

#### ➤ **First version of the Full GOLD IV Report**

To make an efficient use of the time available, Report's chapters will be delivered as follows:

| <b>UCLG will deliver the documents to the Consultant:</b>   | <b>The Consultant should deliver the revised version to UCLG:</b> |
|---|---|
| <b>July 1, 2016:</b> <ul style="list-style-type: none"> <li>• Chapter on Intermediary Cities (pages: 85-95).</li> </ul>   | <b>July 30, 2016</b>  |
| <b>July 20-30, 2016:</b> <ul style="list-style-type: none"> <li>• Chapter on Metropolitan Areas (pages: 85-95).</li> <li>• Chapter on Territories (pages: 85-95).</li> </ul>  | <b>August 10, 2016</b><br><b>August 15, 2016</b>                  |
| <b>August 8-15, 2016:</b> <ul style="list-style-type: none"> <li>• Conclusion (40 pages).</li> <li>• Introduction (10-15 pages).</li> <li>• Complete bibliography.</li> </ul> | <b>August 22-27, 2016</b>   |
| ➤ <b>Executive Summary (only part of document)</b>  | <b>Executive Summary (only part of document)</b>                  |
| <b>August 15, 2016:</b> <ul style="list-style-type: none"> <li>• Executive Summary (40 pages).</li> </ul>   | <b>August 31, 2016</b>  |

Provided that **all these documents** must be published by the beginning of October 2016, **the versions of both the Full GOLD IV Report and the Executive Summary must be ready for layout and formatting before September 1, 2016.** Specifically, the individual Report chapters (Metropolitan Areas, Intermediary Cities and Territories) should be ready by August 20, 2016, at the latest.

The revision of the layout version should be done during September (from 1<sup>st</sup> to 15<sup>th</sup>)

**Phase 2: Final version of the Full Report**

The layout of **the revised English version**, together with the **French and Spanish versions**, will be done during the **first semester of 2017**. The three final publications of the GOLD 4 Report, in English, French and Spanish, **must be published before July 1, 2017**.

**6. Requirements**

This tender is addressed preferably at professionals and/or companies 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.

**7. Budget**

The current available budget for the abovementioned tasks is EUR 20,000.00 (+ VAT)

## **ANNEX 2                      CONTRACTUAL BINDING CONDITIONS**

**Ref. Tender:                      004 -2016**

|  |   |   |                  |
|--|---|---|------------------|
| <b>Publication date:</b>                                 | 25-05-2016  | <b>Deadline for submitting tenders:</b> | 14-06-2016 18:00 |
| <b>Document:</b>   | <b>Editorial correction and proofreading for the GOLD IV Full Report and the GOLD IV Executive Summary</b>  |   |                  |
| <b>Name and address of the Contracting Authority:</b>    | ORGANIZACION MUNDIAL DE CIUDADES Y GOBIERNOS LOCALES UNIDOS (UCLG)<br>Avinyó 15<br>08002 Barcelona (Spain)<br>Tel: +34 933428750<br>Fax.: +34933428760<br>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 fourth 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 5<sup>th</sup> World Congress of UCLG, which will take place in Bogotá (12-15 October 2016). 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>                         | 12 months   |   |                  |
| <b>Procedure type:</b>                                   | Open procedure  |   |                  |
| <b>Budget:</b>   | EUR 20,000.00 (V.A.T. not included)   |   |                  |
| <b>Language of the services and communication:</b>       | English, Spanish, French  |   |                  |
| <b>Language submission (preference)</b>                  | English, Spanish, French  |   |                  |
| <b>Status:</b>   | Open  |   |                  |
| <b>Notification of award to the successful tenderer:</b> | 15 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 award, tenderer(s) to which the contract is to be awarded, must supply evidence about fiscal residence in its 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...) 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 Tender set of 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). It will not be accepted any tender beyond the submission date, except that otherwise informed in the web site.
- 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 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 analysed, 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.