

*United Nations Development Programme*



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# REQUEST FOR PROPOSAL

## **Provision of Editing and Production Services for UNDP Human Development Report and its Overview**

RFP No.: UNDP/HDRO/RFP/2020/005

Project: UNDP Human Development Report (HDR)

Country: UNDP HQ, New York, USA

Issued on: 12 February 2020

# Contents

<b>SECTION 1. LETTER OF INVITATION.....</b>	<b>4</b>
<b>SECTION 2. INSTRUCTION TO BIDDERS .....</b>	<b>5</b>
<b>A. GENERAL PROVISIONS .....</b>	<b>5</b>
1. Introduction .....	5
2. Fraud & Corruption, Gifts and Hospitality .....	5
3. Eligibility.....	5
4. Conflict of Interests.....	6
<b>B. PREPARATION OF PROPOSALS .....</b>	<b>6</b>
5. General Considerations.....	6
6. Cost of Preparation of Proposal .....	6
7. Language .....	6
8. Documents Comprising the Proposal.....	6
9. Documents Establishing the Eligibility and Qualifications of the Bidder .....	7
10. Technical Proposal Format and Content .....	7
11. Financial Proposals .....	7
12. Proposal Security .....	7
13. Currencies .....	8
14. Joint Venture, Consortium or Association .....	8
15. Only One Proposal .....	9
16. Proposal Validity Period .....	9
17. Extension of Proposal Validity Period .....	9
18. Clarification of Proposal.....	9
19. Amendment of Proposals .....	9
20. Alternative Proposals .....	10
21. Pre-Bid Conference .....	10
<b>C. SUBMISSION AND OPENING OF PROPOSALS .....</b>	<b>10</b>
22. Submission .....	10
23. Deadline for Submission of Proposals and Late Proposals.....	11
24. Withdrawal, Substitution, and Modification of Proposals .....	11
25. Proposal Opening.....	12
<b>D. EVALUATION OF PROPOSALS .....</b>	<b>12</b>
26. Confidentiality.....	12
27. Evaluation of Proposals.....	12
28. Preliminary Examination .....	12
29. Evaluation of Eligibility and Qualification .....	12
30. Evaluation of Technical and Financial Proposals.....	13
31. Due Diligence .....	13
32. Clarification of Proposals .....	14
33. Responsiveness of Proposal .....	14
34. Nonconformities, Reparable Errors and Omissions .....	14
<b>E. AWARD OF CONTRACT.....</b>	<b>15</b>
35. Right to Accept, Reject, Any or All Proposals.....	15
36. Award Criteria .....	15
37. Debriefing .....	15
38. Right to Vary Requirements at the Time of Award .....	15
39. Contract Signature .....	15
40. Contract Type and General Terms and Conditions .....	15
41. Performance Security .....	15
42. Bank Guarantee for Advanced Payment.....	15
43. Liquidated Damages .....	16
44. Payment Provisions.....	16
45. Vendor Protest.....	16
46. Other Provisions .....	16

**SECTION 3. BID DATA SHEET .....17**

**SECTION 4. EVALUATION CRITERIA .....20**

**SECTION 5. TERMS OF REFERENCE .....24**

**SECTION 6: RETURNABLE BIDDING FORMS / CHECKLIST .....30**

    FORM A: TECHNICAL PROPOSAL SUBMISSION FORM .....31

    FORM B: BIDDER INFORMATION FORM.....32

    FORM C: JOINT VENTURE/CONSORTIUM/ASSOCIATION INFORMATION FORM .....33

    FORM D: QUALIFICATION FORM .....34

    FORM E: FORMAT OF TECHNICAL PROPOSAL .....37

    FORM F: FINANCIAL PROPOSAL SUBMISSION FORM.....40

    FORM G: FINANCIAL PROPOSAL FORM .....41

## Section 1. Letter of Invitation

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The United Nations Development Programme (UNDP) hereby invites you to submit a Proposal to this Request for Proposal (RFP) for the above-referenced subject.

This RFP includes the following documents and the General Terms and Conditions of Contract which is inserted in the Bid Data Sheet (BDS):

- Section 1: This Letter of Invitation
- Section 2: Instruction to Bidders
- Section 3: Bid Data Sheet (BDS)
- Section 4: Evaluation Criteria
- Section 5: Terms of Reference
- Section 6: Returnable Bidding Forms
  - Form A: Technical Proposal Submission Form
  - Form B: Bidder Information Form
  - Form C: Joint Venture/Consortium/Association Information Form
  - Form D: Qualification Form
  - Form E: Format of Technical Proposal
  - Form F: Financial Proposal Submission Form
  - Form G: Financial Proposal Form

If you are interested in submitting a Proposal in response to this RFP, please prepare your Proposal in accordance with the requirements and procedure as set out in this RFP and submit it by the Deadline for Submission of Proposals set out in Bid Data Sheet.

Please acknowledge receipt of this RFP by sending an email to [cpu.bids@undp.org](mailto:cpu.bids@undp.org), indicating whether you intend to submit a Proposal or otherwise. You may also utilize the **"Accept Invitation"** function in eTendering system, where applicable. This will enable you to receive amendments or updates to the RFP. Should you require further clarifications, kindly communicate with the contact person/s identified in the attached Bid Data Sheet as the focal point for queries on this RFP.

UNDP looks forward to receiving your Proposal and thank you in advance for your interest in UNDP procurement opportunities.

Issued by:

Approved by:

Ferouze A. Mohamed



Name: Ferouze Abdi Mohamed

Name: Ali Tahsin Jumah

Title: Procurement Analyst

Title: Chief, Central Procurement Unit

Date: 12 February 2020

Date: 12 February 2020

## Section 2. Instruction to Bidders

A. GENERAL PROVISIONS	
1. Introduction	1.1 Bidders shall adhere to all the requirements of this RFP, including any amendments in writing by UNDP. This RFP is conducted in accordance with the UNDP Programme and Operations Policies and Procedures (POPP) on Contracts and Procurement which can be accessed at <a href="https://popp.undp.org/SitePages/POPPBSUnit.aspx?TermID=254a9f96-b883-476a-8ef8-e81f93a2b38d">https://popp.undp.org/SitePages/POPPBSUnit.aspx?TermID=254a9f96-b883-476a-8ef8-e81f93a2b38d</a>
	1.2 Any Proposal submitted will be regarded as an offer by the Bidder and does not constitute or imply the acceptance of the Proposal by UNDP. UNDP is under no obligation to award a contract to any Bidder as a result of this RFP.
	1.3 As part of the bid, it is desired that the Bidder registers at the United Nations Global Marketplace (UNGM) website ( <a href="http://www.ungm.org">www.ungm.org</a> ). The Bidder may still submit a bid even if not registered with the UNGM. However, if the Bidder is selected for contract award, the Bidder must register on the UNGM prior to contract signature.
2. Fraud & Corruption, Gifts and Hospitality	2.1 UNDP strictly enforces a policy of zero tolerance on proscribed practices, including fraud, corruption, collusion, unethical or unprofessional practices, and obstruction of UNDP vendors and requires all bidders/vendors observe the highest standard of ethics during the procurement process and contract implementation. UNDP's Anti-Fraud Policy can be found at <a href="http://www.undp.org/content/undp/en/home/operations/accountability/audit/office_of_audit_andinvestigation.html#anti">http://www.undp.org/content/undp/en/home/operations/accountability/audit/office_of_audit_andinvestigation.html#anti</a>
	2.2 Bidders/vendors shall not offer gifts or hospitality of any kind to UNDP staff members including recreational trips to sporting or cultural events, theme parks or offers of holidays, transportation, or invitations to extravagant lunches or dinners.
	2.3 In pursuance of this policy, UNDP (a) Shall reject a proposal if it determines that the selected bidder has engaged in any corrupt or fraudulent practices in competing for the contract in question; (b) Shall declare a vendor ineligible, either indefinitely or for a stated period of time, to be awarded a contract if at any time it determines that the vendor has engaged in any corrupt or fraudulent practices in competing for, or in executing a UNDP contract.
	2.4 All Bidders must adhere to the UN Supplier Code of Conduct, which may be found at <a href="https://www.un.org/Depts/ptd/sites/www.un.org.Depts.ptd/files/files/attachment/page/pdf/unscoc/conduct_english.pdf">https://www.un.org/Depts/ptd/sites/www.un.org.Depts.ptd/files/files/attachment/page/pdf/unscoc/conduct_english.pdf</a>
3. Eligibility	3.1 A vendor should not be suspended, debarred, or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization. Vendors are therefore required to disclose to UNDP whether they are subject to any sanction or temporary suspension imposed by these organizations.
	3.2 It is the Bidder's responsibility to ensure that its employees, joint venture members, sub-contractors, service providers, suppliers and/or their employees meet the eligibility requirements as established by UNDP.

<b>4. Conflict of Interests</b>	<p>4.1 Bidders must strictly avoid conflicts with other assignments or their own interests, and act without consideration for future work. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this solicitation process, if they:</p> <ul style="list-style-type: none"> <li>a) Are or have been associated in the past, with a firm or any of its affiliates which have been engaged by UNDP to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the goods and services in this selection process;</li> <li>b) Were involved in the preparation and/or design of the programme/project related to the services requested under this RFP; or</li> <li>c) Are found to be in conflict for any other reason, as may be established by, or at the discretion of UNDP.</li> </ul> <p>4.2 In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to UNDP, and seek UNDP's confirmation on whether or not such a conflict exists.</p> <p>4.3 Similarly, the Bidders must disclose in their proposal their knowledge of the following:</p> <ul style="list-style-type: none"> <li>a) If the owners, part-owners, officers, directors, controlling shareholders, of the bidding entity or key personnel are family members of UNDP staff involved in the procurement functions and/or the Government of the country or any Implementing Partner receiving services under this RFP; and</li> <li>b) All other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.</li> </ul> <p>Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.</p> <p>4.4 The eligibility of Bidders that are wholly or partly owned by the Government shall be subject to UNDP's further evaluation and review of various factors such as being registered, operated and managed as an independent business entity, the extent of Government ownership/share, receipt of subsidies, mandate and access to information in relation to this RFP, among others. Conditions that may lead to undue advantage against other Bidders may result in the eventual rejection of the Proposal.</p>
<b>B. PREPARATION OF PROPOSALS</b>	
<b>5. General Considerations</b>	<p>5.1 In preparing the Proposal, the Bidder is expected to examine the RFP in detail. Material deficiencies in providing the information requested in the RFP may result in rejection of the Proposal.</p> <p>5.2 The Bidder will not be permitted to take advantage of any errors or omissions in the RFP. Should such errors or omissions be discovered, the Bidder must notify the UNDP</p>
<b>6. Cost of Preparation of Proposal</b>	<p>6.1 The Bidder shall bear any and all costs related to the preparation and/or submission of the Proposal, regardless of whether its Proposal was selected or not. UNDP shall not be responsible or liable for those costs, regardless of the conduct or outcome of the procurement process.</p>
<b>7. Language</b>	<p>7.1 The Proposal, as well as any and all related correspondence exchanged by the Bidder and UNDP, shall be written in the language (s) specified in the BDS.</p>
<b>8. Documents</b>	<p>8.1 The Proposal shall comprise of the following documents:</p>

<b>Comprising the Proposal</b>	<ul style="list-style-type: none"> <li>a) Documents Establishing the Eligibility and Qualifications of the Bidder;</li> <li>b) Technical Proposal;</li> <li>c) Financial Proposal;</li> <li>d) Proposal Security, if required by BDS;</li> <li>e) Any attachments and/or appendices to the Proposal.</li> </ul>
<b>9. Documents Establishing the Eligibility and Qualifications of the Bidder</b>	<p>9.1 The Bidder shall furnish documentary evidence of its status as an eligible and qualified vendor, using the Forms provided under Section 6 and providing documents required in those forms. In order to award a contract to a Bidder, its qualifications must be documented to UNDP's satisfaction.</p>
<b>10. Technical Proposal Format and Content</b>	<p>10.1 The Bidder is required to submit a Technical Proposal using the Standard Forms and templates provided in Section 6 of the RFP.</p> <p>10.2 The Technical Proposal shall not include any price or financial information. A Technical Proposal containing material financial information may be declared non-responsive.</p> <p>10.3 Samples of items, when required as per Section 5, shall be provided within the time specified and unless otherwise specified by UNDP, and at no expense to UNDP</p> <p>10.4 When applicable and required as per Section 5, the Bidder shall describe the necessary training programme available for the maintenance and operation of the services and/or equipment offered as well as the cost to the UNDP. Unless otherwise specified, such training as well as training materials shall be provided in the language of the Bid as specified in the BDS.</p>
<b>11. Financial Proposals</b>	<p>11.1 The Financial Proposal shall be prepared using the Standard Form provided in Section 6 of the RFP. It shall list all major cost components associated with the services, and the detailed breakdown of such costs.</p> <p>11.2 Any output and activities described in the Technical Proposal but not priced in the Financial Proposal, shall be assumed to be included in the prices of other activities or items, as well as in the final total price.</p> <p>11.3 Prices and other financial information must not be disclosed in any other place except in the financial proposal.</p>
<b>12. Proposal Security</b>	<p>12.1 A Proposal Security, if required by BDS, shall be provided in the amount and form indicated in the BDS. The Proposal Security shall be valid up to thirty (30) days after the final date of validity of the Proposal.</p> <p>12.2 The Proposal Security shall be included along with the Technical Proposal. If Proposal Security is required by the RFP but is not found along with the Technical Proposal, the Proposal shall be rejected.</p> <p>12.3 If the Proposal Security amount or its validity period is found to be less than what is required by UNDP, UNDP shall reject the Proposal.</p> <p>12.4 In the event an electronic submission is allowed in the BDS, Bidders shall include a copy of the Bid Security in their proposal and the original of the Proposal Security must be sent via courier or hand delivery as per the instructions in BDS.</p> <p>12.5 The Proposal Security may be forfeited by UNDP, and the Proposal rejected, in the event of any one or combination, of the following conditions:</p> <ul style="list-style-type: none"> <li>a) If the Bidder withdraws its offer during the period of the Proposal Validity specified in the BDS, or;</li> <li>b) In the event that the successful Bidder fails:</li> </ul>

	<p>i. to sign the Contract after UNDP has issued an award; or</p> <p>12.6 to furnish the Performance Security, insurances, or other documents that UNDP may require as a condition precedent to the effectivity of the contract that may be awarded to the Bidder.</p>
<b>13. Currencies</b>	<p>13.1 All prices shall be quoted in the currency or currencies indicated in the BDS. Where Proposals are quoted in different currencies, for the purposes of comparison of all Proposals:</p> <p>a) UNDP will convert the currency quoted in the Proposal into the UNDP preferred currency, in accordance with the prevailing UN operational rate of exchange on the last day of submission of Proposals; and</p> <p>b) In the event that UNDP selects a proposal for award that is quoted in a currency different from the preferred currency in the BDS, UNDP shall reserve the right to award the contract in the currency of UNDP's preference, using the conversion method specified above.</p>
<b>14. Joint Venture, Consortium or Association</b>	<p>14.1 If the Bidder is a group of legal entities that will form or have formed a Joint Venture (JV), Consortium or Association for the Proposal, they shall confirm in their Proposal that : (i) they have designated one party to act as a lead entity, duly vested with authority to legally bind the members of the JV, Consortium or Association jointly and severally, which shall be evidenced by a duly notarized Agreement among the legal entities, and submitted with the Proposal; and (ii) if they are awarded the contract, the contract shall be entered into, by and between UNDP and the designated lead entity, who shall be acting for and on behalf of all the member entities comprising the joint venture.</p> <p>14.2 After the Deadline for Submission of Proposal, the lead entity identified to represent the JV, Consortium or Association shall not be altered without the prior written consent of UNDP.</p> <p>14.3 The lead entity and the member entities of the JV, Consortium or Association shall abide by the provisions of Clause 9 herein in respect of submitting only one proposal.</p> <p>14.4 The description of the organization of the JV, Consortium or Association must clearly define the expected role of each of the entity in the joint venture in delivering the requirements of the RFP, both in the Proposal and the JV, Consortium or Association Agreement. All entities that comprise the JV, Consortium or Association shall be subject to the eligibility and qualification assessment by UNDP.</p> <p>14.5 A JV, Consortium or Association in presenting its track record and experience should clearly differentiate between:</p> <p>a) Those that were undertaken together by the JV, Consortium or Association; and</p> <p>b) Those that were undertaken by the individual entities of the JV, Consortium or Association.</p> <p>14.6 Previous contracts completed by individual experts working privately but who are permanently or were temporarily associated with any of the member firms cannot be claimed as the experience of the JV, Consortium or Association or those of its members, but should only be claimed by the individual experts themselves in their presentation of their individual credentials.</p> <p>14.7 JV, Consortium or Associations are encouraged for high value, multi-sectoral requirements when the spectrum of expertise and resources required may not be available within one firm.</p>



<b>15. Only One Proposal</b>	<p>15.1 The Bidder (including the individual members of any Joint Venture) shall submit only one Proposal, either in its own name or as part of a Joint Venture.</p> <p>15.2 Proposals submitted by two (2) or more Bidders shall all be rejected if they are found to have any of the following:</p> <ul style="list-style-type: none"> <li>a) they have at least one controlling partner, director or shareholder in common; or</li> <li>b) any one of them receive or have received any direct or indirect subsidy from the other/s; or</li> <li>c) they have the same legal representative for purposes of this RFP; or</li> <li>d) they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about, or influence on the Proposal of, another Bidder regarding this RFP process;</li> <li>e) they are subcontractors to each other's Proposal, or a subcontractor to one Proposal also submits another Proposal under its name as lead Bidder; or</li> <li>f) some key personnel proposed to be in the team of one Bidder participates in more than one Proposal received for this RFP process. This condition relating to the personnel, does not apply to subcontractors being included in more than one Proposal.</li> </ul>
<b>16. Proposal Validity Period</b>	<p>16.1 Proposals shall remain valid for the period specified in the BDS, commencing on the Deadline for Submission of Proposals. A Proposal valid for a shorter period may be rejected by UNDP and rendered non-responsive.</p> <p>16.2 During the Proposal validity period, the Bidder shall maintain its original Proposal without any change, including the availability of the Key Personnel, the proposed rates and the total price.</p>
<b>17. Extension of Proposal Validity Period</b>	<p>17.1 In exceptional circumstances, prior to the expiration of the proposal validity period, UNDP may request Bidders to extend the period of validity of their Proposals. The request and the responses shall be made in writing, and shall be considered integral to the Proposal.</p> <p>17.2 If the Bidder agrees to extend the validity of its Proposal, it shall be done without any change in the original Proposal.</p> <p>17.3 The Bidder has the right to refuse to extend the validity of its Proposal, and in which case, such Proposal will not be further evaluated.</p>
<b>18. Clarification of Proposal</b>	<p>18.1 Bidders may request clarifications on any of the RFP documents no later than the date indicated in the BDS. Any request for clarification must be sent in writing in the manner indicated in the BDS. If inquiries are sent other than specified channel, even if they are sent to a UNDP staff member, UNDP shall have no obligation to respond or confirm that the query was officially received.</p> <p>18.2 UNDP will provide the responses to clarifications through the method specified in the BDS.</p> <p>18.3 UNDP shall endeavor to provide responses to clarifications in an expeditious manner, but any delay in such response shall not cause an obligation on the part of UNDP to extend the submission date of the Proposals, unless UNDP deems that such an extension is justified and necessary.</p>
<b>19. Amendment of Proposals</b>	<p>19.1 At any time prior to the deadline of Proposal submission, UNDP may for any reason, such as in response to a clarification requested by a Bidder, modify the RFP in the form of an amendment to the RFP. Amendments will be made available to all prospective bidders.</p>

	19.2	If the amendment is substantial, UNDP may extend the Deadline for submission of proposal to give the Bidders reasonable time to incorporate the amendment into their Proposals.
<b>20. Alternative Proposals</b>	20.1	Unless otherwise specified in the BDS, alternative proposals shall not be considered. If submission of alternative proposal is allowed by BDS, a Bidder may submit an alternative proposal, but only if it also submits a proposal conforming to the RFP requirements. UNDP shall only consider the alternative proposal offered by the Bidder whose conforming proposal ranked the highest as per the specified evaluation method. Where the conditions for its acceptance are met, or justifications are clearly established, UNDP reserves the right to award a contract based on an alternative proposal.
	20.2	If multiple/alternative proposals are being submitted, they must be clearly marked as "Main Proposal" and "Alternative Proposal"
<b>21. Pre-Bid Conference</b>	21.1	When appropriate, a Bidder's conference will be conducted at the date, time and location specified in the BDS. All Bidders are encouraged to attend. Non-attendance, however, shall not result in disqualification of an interested Bidder. Minutes of the Bidder's conference will be disseminated on the procurement website and shared by email or on the e-Tendering platform as specified in the BDS. No verbal statement made during the conference shall modify the terms and conditions of the RFP, unless specifically incorporated in the Minutes of the Bidder's Conference or issued/posted as an amendment to RFP.
<b>C. SUBMISSION AND OPENING OF PROPOSALS</b>		
<b>22. Submission</b>	22.1	The Bidder shall submit a duly signed and complete Proposal comprising the documents and forms in accordance with the requirements in the BDS. The submission shall be in the manner specified in the BDS.
	22.2	The Proposal shall be signed by the Bidder or person(s) duly authorized to commit the Bidder. The authorization shall be communicated through a document evidencing such authorization issued by the legal representative of the bidding entity, or a Power of Attorney, accompanying the Proposal.
	22.3	Bidders must be aware that the mere act of submission of a Proposal, in and of itself, implies that the Bidder fully accepts the UNDP General Contract Terms and Conditions.
<b>Hard copy (manual) submission</b>	22.4	Hard copy (manual) submission by courier or hand delivery allowed or specified in the BDS shall be governed as follows: <ul style="list-style-type: none"> <li>a) The signed Proposal shall be marked "Original", and its copies marked "Copy" as appropriate. The number of copies is indicated in the BDS. All copies shall be made from the signed original only. If there are discrepancies between the original and the copies, the original shall prevail.</li> <li>b) The Technical Proposal and the Financial Proposal envelopes MUST BE COMPLETELY SEPARATE and each of them must be submitted sealed individually and clearly marked on the outside as either "TECHNICAL PROPOSAL" or "FINANCIAL PROPOSAL", as appropriate. Each envelope SHALL clearly indicate the name of the Bidder. The outer envelopes shall: <ul style="list-style-type: none"> <li>i. Bear the name and address of the bidder;</li> <li>ii. Be addressed to UNDP as specified in the BDS</li> </ul> </li> </ul>

	<p>iii. Bear a warning that states <i>"Not to be opened before the time and date for proposal opening"</i> as specified in the BDS.</p> <p>If the envelopes and packages with the Proposal are not sealed and marked as required, UNDP shall assume no responsibility for the misplacement, loss, or premature opening of the Proposal.</p> <p><b>Email Submission</b></p> <p>22.5 Email submission, if allowed or specified in the BDS, shall be governed as follows:</p> <ul style="list-style-type: none"> <li>a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS;</li> <li>b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE. The financial proposal shall be encrypted with different passwords and clearly labelled. The files must be sent to the dedicated email address specified in the BDS.</li> <li>c) The password for opening the Financial Proposal should be provided only upon request of UNDP. UNDP will request password only from bidders whose Technical Proposal has been found to be technically responsive. Failure to provide correct password may result in the proposal being rejected.</li> </ul> <p><b>eTendering submission</b></p> <p>22.6 Electronic submission through eTendering, if allowed or specified in the BDS, shall be governed as follows:</p> <ul style="list-style-type: none"> <li>a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS;</li> <li>b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE and each of them must be uploaded individually and clearly labelled.</li> <li>d) The Financial Proposal file must be encrypted with a password so that it cannot be opened nor viewed until the password is provided. The password for opening the Financial Proposal should be provided only upon request of UNDP. UNDP will request password only from bidders whose technical proposal has been found to be technically responsive. Failure to provide the correct password may result in the proposal being rejected.</li> <li>c) Documents which are required to be in original form (e.g. Bid Security, etc.) must be sent via courier or hand delivery as per the instructions in BDS.</li> <li>d) Detailed instructions on how to submit, modify or cancel a bid in the eTendering system are provided in the eTendering system Bidder User Guide and Instructional videos available on this link:  <a href="http://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notices/resources/">http://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notices/resources/</a></li> </ul>
<p><b>23. Deadline for Submission of Proposals and Late Proposals</b></p>	<p>23.1 Complete Proposals must be received by UNDP in the manner, and no later than the date and time, specified in the BDS. UNDP shall only recognize the date and time that the bid was received by UNDP</p> <p>23.2 UNDP shall not consider any Proposal that is submitted after the deadline for the submission of Proposals.</p>
<p><b>24. Withdrawal, Substitution, and Modification of Proposals</b></p>	<p>24.1 A Bidder may withdraw, substitute or modify its Proposal after it has been submitted at any time prior to the deadline for submission.</p> <p>24.2 Manual and Email submissions: A bidder may withdraw, substitute or modify its Proposal by sending a written notice to UNDP, duly signed by an authorized representative, and shall include a copy of the authorization (or a Power of</p>

	<p>Attorney). The corresponding substitution or modification of the Proposal, if any, must accompany the respective written notice. All notices must be submitted in the same manner as specified for submission of proposals, by clearly marking them as "WITHDRAWAL," "SUBSTITUTION," or "MODIFICATION"</p> <p>24.3 eTendering: A Bidder may withdraw, substitute or modify its Proposal by Canceling, Editing, and re-submitting the proposal directly in the system. It is the responsibility of the Bidder to properly follow the system instructions, duly edit and submit a substitution or modification of the Proposal as needed. Detailed instructions on how to cancel or modify a Proposal directly in the system are provided in Bidder User Guide and Instructional videos.</p> <p>24.4 Proposals requested to be withdrawn shall be returned unopened to the Bidders (only for manual submissions), except if the bid is withdrawn after the bid has been opened</p>
<b>25. Proposal Opening</b>	<p>25.1 There is no public bid opening for RFPs. UNDP shall open the Proposals in the presence of an ad-hoc committee formed by UNDP, consisting of at least two (2) members. In the case of e-Tendering submission, bidders will receive an automatic notification once their proposal is opened.</p>
<b>D. EVALUATION OF PROPOSALS</b>	
<b>26. Confidentiality</b>	<p>26.1 Information relating to the examination, evaluation, and comparison of Proposals, and the recommendation of contract award, shall not be disclosed to Bidders or any other persons not officially concerned with such process, even after publication of the contract award.</p> <p>26.2 Any effort by a Bidder or anyone on behalf of the Bidder to influence UNDP in the examination, evaluation and comparison of the Proposals or contract award decisions may, at UNDP's decision, result in the rejection of its Proposal and may be subject to the application of prevailing UNDP's vendor sanctions procedures.</p>
<b>27. Evaluation of Proposals</b>	<p>27.1 The Bidder is not permitted to alter or modify its Proposal in any way after the proposal submission deadline except as permitted under Clause 24 of this RFP. UNDP will conduct the evaluation solely on the basis of the submitted Technical and Financial Proposals.</p> <p>27.2 Evaluation of proposals is made of the following steps:</p> <ol style="list-style-type: none"> <li>Preliminary Examination</li> <li>Minimum Eligibility and Qualification (if pre-qualification is not done)</li> <li>Evaluation of Technical Proposals</li> <li>Evaluation of Financial Proposals</li> </ol>
<b>28. Preliminary Examination</b>	<p>28.1 UNDP shall examine the Proposals to determine whether they are complete with respect to minimum documentary requirements, whether the documents have been properly signed, and whether the Proposals are generally in order, among other indicators that may be used at this stage. UNDP reserves the right to reject any Proposal at this stage.</p>
<b>29. Evaluation of Eligibility and Qualification</b>	<p>29.1 Eligibility and Qualification of the Bidder will be evaluated against the Minimum Eligibility/Qualification requirements specified in the Section 4 (Evaluation Criteria).</p> <p>29.2 In general terms, vendors that meet the following criteria may be considered qualified:</p> <ol style="list-style-type: none"> <li>They are not included in the UN Security Council 1267/1989 Committee's list of terrorists and terrorist financiers, and in UNDP's ineligible vendors' list;</li> <li>They have a good financial standing and have access to adequate financial</li> </ol>

	<p>resources to perform the contract and all existing commercial commitments,</p> <ul style="list-style-type: none"> <li>c) They have the necessary similar experience, technical expertise, production capacity where applicable, quality certifications, quality assurance procedures and other resources applicable to the provision of the services required;</li> <li>d) They are able to comply fully with UNDP General Terms and Conditions of Contract;</li> <li>e) They do not have a consistent history of court/arbitral award decisions against the Bidder; and</li> <li>f) They have a record of timely and satisfactory performance with their clients.</li> </ul>
<b>30. Evaluation of Technical and Financial Proposals</b>	<p>30.1 The evaluation team shall review and evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference and other RFP documents, applying the evaluation criteria, sub-criteria, and point system specified in the Section 4 (Evaluation Criteria). A Proposal shall be rendered non-responsive at the technical evaluation stage if it fails to achieve the minimum technical score indicated in the BDS. When necessary and if stated in the BDS, UNDP may invite technically responsive bidders for a presentation related to their technical proposals. The conditions for the presentation shall be provided in the bid document where required.</p> <p>30.2 In the second stage, only the Financial Proposals of those Bidders who achieve the minimum technical score will be opened for evaluation. The Financial Proposals corresponding to Technical Proposals that were rendered non-responsive shall remain unopened, and, in the case of manual submission, be returned to the Bidder unopened. For emailed Proposals and e-tendering submissions, UNDP will not request for the password of the Financial Proposals of bidders whose Technical Proposal were found not responsive.</p> <p>30.3 The evaluation method that applies for this RFP shall be as indicated in the BDS, which may be either of two (2) possible methods, as follows: (a) the lowest priced method which selects the lowest evaluated financial proposal of the technically responsive Bidders; or (b) the combined scoring method which will be based on a combination of the technical and financial score.</p> <p>30.4 When the BDS specifies a combined scoring method, the formula for the rating of the Proposals will be as follows:</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><u>Rating the Technical Proposal (TP):</u></p> <p style="text-align: center;"><b>TP Rating</b> = (Total Score Obtained by the Offer / Max. Obtainable Score for TP) x 100</p> <p><u>Rating the Financial Proposal (FP):</u></p> <p style="text-align: center;"><b>FP Rating</b> = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100</p> <p><u>Total Combined Score:</u></p> <p style="text-align: center;"><b>Combined Score</b> = (TP Rating) x (Weight of TP, e.g. 70%) + (FP Rating) x (Weight of FP, e.g., 30%)</p> </div>
<b>31. Due Diligence</b>	<p>31.1 UNDP reserves the right to undertake a due diligence exercise, also called post qualification, aimed at determining to its satisfaction, the validity of the information provided by the Bidder. Such exercise shall be fully documented and may include, but need not be limited to, all or any combination of the</p>

	<p>following:</p> <ul style="list-style-type: none"> <li>a) Verification of accuracy, correctness and authenticity of information provided by the Bidder;</li> <li>b) Validation of extent of compliance to the RFP requirements and evaluation criteria based on what has so far been found by the evaluation team;</li> <li>c) Inquiry and reference checking with Government entities with jurisdiction on the Bidder, or with previous clients, or any other entity that may have done business with the Bidder;</li> <li>d) Inquiry and reference checking with previous clients on the performance on on-going or contracts completed, including physical inspections of previous works, as necessary;</li> <li>e) Physical inspection of the Bidder's offices, branches or other places where business transpires, with or without notice to the Bidder;</li> <li>f) Other means that UNDP may deem appropriate, at any stage within the selection process, prior to awarding the contract.</li> </ul>
<b>32. Clarification of Proposals</b>	<p>32.1 To assist in the examination, evaluation and comparison of Proposals, UNDP may, at its discretion, ask any Bidder for a clarification of its Proposal.</p> <p>32.2 UNDP's request for clarification and the response shall be in writing and no change in the prices or substance of the Proposal shall be sought, offered, or permitted, except to provide clarification, and confirm the correction of any arithmetic errors discovered by UNDP in the evaluation of the Proposals, in accordance with RFP.</p> <p>32.3 Any unsolicited clarification submitted by a Bidder in respect to its Proposal, which is not a response to a request by UNDP, shall not be considered during the review and evaluation of the Proposals.</p>
<b>33. Responsiveness of Proposal</b>	<p>33.1 UNDP's determination of a Proposal's responsiveness will be based on the contents of the Proposal itself. A substantially responsive Proposal is one that conforms to all the terms, conditions, TOR and other requirements of the RFP without material deviation, reservation, or omission.</p> <p>33.2 If a Proposal is not substantially responsive, it shall be rejected by UNDP and may not subsequently be made responsive by the Bidder by correction of the material deviation, reservation, or omission.</p>
<b>34. Nonconformities, Repairable Errors and Omissions</b>	<p>34.1 Provided that a Proposal is substantially responsive, UNDP may waive any non-conformities or omissions in the Proposal that, in the opinion of UNDP, do not constitute a material deviation.</p> <p>34.2 UNDP may request the Bidder to submit the necessary information or documentation, within a reasonable period of time, to rectify nonmaterial nonconformities or omissions in the Proposal related to documentation requirements. Such omission shall not be related to any aspect of the price of the Proposal. Failure of the Bidder to comply with the request may result in the rejection of its Proposal.</p> <p>34.3 For Financial Proposal that has been opened, UNDP shall check and correct arithmetical errors as follows:</p> <ul style="list-style-type: none"> <li>a) if there is a discrepancy between the unit price and the line item total that is obtained by multiplying the unit price by the quantity, the unit price shall prevail and the line item total shall be corrected, unless in the opinion of UNDP there is an obvious misplacement of the decimal point in the unit price; in which case the line item total as quoted shall govern and the unit price shall be corrected;</li> <li>b) if there is an error in a total corresponding to the addition or subtraction</li> </ul>

	<p>of subtotals, the subtotals shall prevail and the total shall be corrected; and</p> <p>c) if there is a discrepancy between words and figures, the amount in words shall prevail, unless the amount expressed in words is related to an arithmetic error, in which case the amount in figures shall prevail.</p> <p>34.4 If the Bidder does not accept the correction of errors made by UNDP, its Proposal shall be rejected.</p>
<b>E. AWARD OF CONTRACT</b>	
<b>35. Right to Accept, Reject, Any or All Proposals</b>	35.1 UNDP reserves the right to accept or reject any Proposal, to render any or all of the Proposals as non-responsive, and to reject all Proposals at any time prior to award of contract, without incurring any liability, or obligation to inform the affected Bidder(s) of the grounds for UNDP's action. UNDP shall not be obliged to award the contract to the lowest priced offer.
<b>36. Award Criteria</b>	36.1 Prior to expiration of the proposal validity, UNDP shall award the contract to the qualified Bidder based on the award criteria indicated in the BDS.
<b>37. Debriefing</b>	37.1 In the event that a Bidder is unsuccessful, the Bidder may request a debriefing from UNDP. The purpose of the debriefing is to discuss the strengths and weaknesses of the Bidder's submission, in order to assist the Bidder in improving its future proposals for UNDP procurement opportunities. The content of other proposals and how they compare to the Bidder's submission shall not be discussed.
<b>38. Right to Vary Requirements at the Time of Award</b>	38.1 At the time of award of Contract, UNDP reserves the right to vary the quantity of services and/or goods, by up to a maximum twenty-five per cent (25%) of the total offer, without any change in the unit price or other terms and conditions.
<b>39. Contract Signature</b>	39.1 Within fifteen (15) days from the date of receipt of the Contract, the successful Bidder shall sign and date the Contract and return it to UNDP. Failure to do so may constitute sufficient grounds for the annulment of the award, and forfeiture of the Proposal Security, if any, and on which event, UNDP may award the Contract to the Second Ranked Bidder or call for new Proposals.
<b>40. Contract Type and General Terms and Conditions</b>	40.1 The types of Contract to be signed and the applicable UNDP Contract General Terms and Conditions, as specified in BDS, can be accessed at <a href="http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html">http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</a>
<b>41. Performance Security</b>	41.1 40.1 A performance security, if required in BDS, shall be provided in the amount specified in BDS and form available at <a href="https://popp.undp.org/layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Solicitation_Performance%20Guarantee%20Form.docx&amp;action=default">https://popp.undp.org/layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Solicitation_Performance%20Guarantee%20Form.docx&amp;action=default</a> within fifteen (15) days of the contract signature by both parties. Where a performance security is required, the receipt of the performance security by UNDP shall be a condition for rendering the contract effective.
<b>42. Bank Guarantee for Advanced Payment</b>	42.1 Except when the interests of UNDP so require, it is UNDP's preference to make no advance payment(s) (i.e., payments without having received any outputs). If an advance payment is allowed as per BDS, and exceeds 20% of the total contract price, or USD 30,000, whichever is less, the Bidder shall submit a Bank Guarantee in the full amount of the advance payment in the form available at



	<a href="https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Contract%20Management%20Payment%20and%20Taxes_Advanced%20Payment%20Guarantee%20Form.docx&amp;action=default">https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Contract%20Management%20Payment%20and%20Taxes_Advanced%20Payment%20Guarantee%20Form.docx&amp;action=default</a>
<b>43. Liquidated Damages</b>	43.1 If specified in BDS, UNDP shall apply Liquidated Damages resulting from the Contractor's delays or breach of its obligations as per the Contract.
<b>44. Payment Provisions</b>	44.1 Payment will be made only upon UNDP's acceptance of the work performed. The terms of payment shall be within thirty (30) days, after receipt of invoice and certification of acceptance of work issued by the proper authority in UNDP with direct supervision of the Contractor. Payment will be effected by bank transfer in the currency of contract.
<b>45. Vendor Protest</b>	45.1 UNDP's vendor protest procedure provides an opportunity for appeal to those persons or firms not awarded a contract through a competitive procurement process. In the event that a Bidder believes that it was not treated fairly, the following link provides further details regarding UNDP vendor protest procedures: <a href="http://www.undp.org/content/undp/en/home/operations/procurement/business/protest-and-sanctions.html">http://www.undp.org/content/undp/en/home/operations/procurement/business/protest-and-sanctions.html</a>
<b>46. Other Provisions</b>	<p>46.1 In the event that the Bidder offers a lower price to the host Government (e.g. General Services Administration (GSA) of the federal government of the United States of America) for similar services, UNDP shall be entitled to same lower price. The UNDP General Terms and Conditions shall have precedence.</p> <p>46.2 UNDP is entitled to receive the same pricing offered by the same Contractor in contracts with the United Nations and/or its Agencies. The UNDP General Terms and Conditions shall have precedence.</p> <p>46.3 The United Nations has established restrictions on employment of (former) UN staff who have been involved in the procurement process as per bulletin ST/SGB/2006/15 <a href="http://www.un.org/en/ga/search/view_doc.asp?symbol=ST/SGB/2006/15&amp;referer">http://www.un.org/en/ga/search/view_doc.asp?symbol=ST/SGB/2006/15&amp;referer</a></p>



## Section 3. Bid Data Sheet

The following data for the services to be procured shall complement, supplement, or amend the provisions in the Request for Proposals. In the case of a conflict between the Instructions to Bidders, the Data Sheet, and other annexes or references attached to the Data Sheet, the provisions in the Data Sheet shall prevail.

<b>BDS No.</b>	<b>Ref. to Section.2</b>	<b>Data</b>	<b>Specific Instructions / Requirements</b>
1	7	Language of the Proposal	<b>English</b>
2		Submitting Proposals for Parts or sub-parts of the TOR (partial bids)	<b>Not Allowed</b>
3	20	Alternative Proposals	<b>Shall not be considered</b>
4	21	Pre-proposal conference	<b>Will not be conducted</b>
5	10	Proposal Validity Period	<b>120 days</b>
6	14	Bid Security	<b>Not Required</b>
7	41	Advanced Payment upon signing of contract	<b>Not Allowed</b>
8	42	Liquidated Damages	<b>Will not be imposed</b>
9	40	Performance Security	<b>Not Required</b>
10	18	Currency of Proposal	<b>United States Dollar</b>
11	31	Deadline for submitting requests for clarifications/ questions	<b>10 days before the submission deadline</b>
12	31	Contact Details for submitting clarifications/questions	Focal Person in UNDP: <b>Ferouze Abdi Mohamed</b> Address: <b>Central Procurement Unit (CPU), New York, N.Y. 10017</b> E-mail address: <a href="mailto:cpu.bids@undp.org">cpu.bids@undp.org</a>

13	18, 19 and 21	Manner of Disseminating Supplemental Information to the RFP and responses/clarifications to queries	<b>Posted directly to eTendering and UNDP Procurement Notices Website at <a href="https://procurement-notice.undp.org/">https://procurement-notice.undp.org/</a></b>
14	23	Deadline for Submission	<b>9 March 2020 at 15:00hrs New York Time</b> For eTendering submission - as indicated in eTendering system. Note that system time zone is in EST/EDT (New York) time zone.
14	22	Allowable Manner of Submitting Proposals	<input type="checkbox"/> Courier/Hand Delivery <input type="checkbox"/> Submission by email <b>X e-Tendering</b>
15	22	Proposal Submission Address	<a href="https://etendering.partneragencies.org">https://etendering.partneragencies.org</a> <b>Event ID number: <a href="#">UNDP1-CPUP20-005</a></b>
16	22	Electronic submission (email or eTendering) requirements	<ul style="list-style-type: none"> <li>▪ Format: PDF files only</li> <li>▪ File names must be maximum 60 characters long and must not contain any letter or special character other than from Latin alphabet/keyboard.</li> <li>▪ All files must be free of viruses and not corrupted.</li> <li>▪ Technical proposal and financial proposals <u>must</u> be submitted in separate files.</li> <li>▪ Password for financial proposal <u>must</u> not be provided to UNDP until requested by UNDP</li> <li>▪ Max. File Size per transmission: 5MB</li> </ul>
17	27 36	Evaluation Method for the Award of Contract	<b>Combined Scoring Method, using the 70%-30% distribution for technical and financial proposals respectively</b> The minimum technical score required to pass is 70%.
18		Expected date for commencement of Contract	<b>20 April 2020</b>
19		Maximum expected duration of contract	Long term agreement (LTA) for 3 years with possibility of extension for additional 2 years, total of 5 years, subject to UNDP needs, availability of budget and satisfactory contract performance
20	35	UNDP will award the contract to:	One Proposer Only
21	39	Type of Contract	Long Term Agreement (LTA)

			<a href="http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html">http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</a>
22	39	UNDP Contract Terms and Conditions that will apply	UNDP General Terms and Conditions for Contracts <a href="http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html">http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</a>
23		Other Information Related to the RFP	For regular updates on this RFP, please refer to the UNDP Procurement Notices website at the following link: <a href="https://procurement-notices.undp.org/">https://procurement-notices.undp.org/</a>

## Section 4. Evaluation Criteria

### Preliminary Examination Criteria

Proposals will be examined to determine whether they are complete and submitted in accordance with RFP requirements as per below criteria on a Yes/No basis:

- Appropriate signatures
- Power of Attorney
- Minimum documents provided
- Technical and Financial Proposals submitted separately
- Bid Validity

### Minimum Eligibility and Qualification Criteria

Eligibility and Qualification will be evaluated on Pass/Fail basis.

If the Proposal is submitted as a Joint Venture/Consortium/Association, each member should meet minimum criteria, unless otherwise specified in the criterion.

Subject	Criteria	Document Submission requirement
<b>ELIGIBILITY</b>		
<b>Legal Status</b>	Vendor is a legally registered entity.	Form B: Bidder Information Form
<b>Eligibility</b>	Vendor is not suspended, nor debarred, nor otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization in accordance with RFP clause 3.	Form A: Technical Proposal Submission Form
<b>Conflict of Interest</b>	No conflicts of interest in accordance with RFP clause 4.	Form A: Technical Proposal Submission Form
<b>Bankruptcy</b>	Not declared bankruptcy, not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against the vendor that could impair its operations in the foreseeable future.	Form A: Technical Proposal Submission Form
<b>UNDP GTCs</b>	Acceptance of UNDP General Terms and Conditions ( <a href="#">link</a> ) in accordance with RFP clauses 22 and 29.	Online acceptance through eTendering System
<b>QUALIFICATION</b>		
<b>History of Non-Performing Contracts<sup>1</sup></b>	Non-performance of a contract did not occur as a result of contractor default for the last 3 years.	Form D: Qualification Form
<b>Litigation History</b>	No consistent history of court/arbitral award decisions against the Bidder for the last 3 years.	Form D: Qualification Form

<sup>1</sup> Non-performance, as decided by UNDP, shall include all contracts where (a) non-performance was not challenged by the contractor, including through referral to the dispute resolution mechanism under the respective contract, and (b) contracts that were so challenged but fully settled against the contractor. Non-performance shall not include contracts where Employers decision was overruled by the dispute resolution mechanism. Non-performance must be based on all information on fully settled disputes or litigation, i.e. dispute or litigation that has been resolved in accordance with the dispute resolution mechanism under the respective contract and where all appeal instances available to the Bidder have been exhausted.

<b>Previous Experience</b>	The vendor shall demonstrate a minimum of 7 years of relevant experience in a similar field to this TOR and related to Human Development, Economics and/or International Affairs themes.	Form B: Bidder Information Form
	<p>The vendor shall ensure that the CVs of key personnel proposed shall demonstrate the minimum experience requirements as follows:</p> <ul style="list-style-type: none"> <li>- Managing editor shall have a minimum of 15 years of relevant experience and demonstrate the experience leading similar human development/sustainable development projects, including leading structural editing and substantive editing work.</li> <li>- Senior editor shall have a minimum of 10 years of relevant experience in editing of publications of similar size, scope and nature.</li> <li>- Copyeditor and layout artist shall each have a minimum of 7 years of relevant experience working on publications of similar size, scope, and nature.</li> </ul>	Form E: Technical Proposal
	<p>Minimum 3 projects of similar value, nature and complexity implemented over the last 3 years.</p> <p><i>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</i></p>	Form D: Qualification Form
<b>Financial Standing</b>	<p>Bidder must demonstrate the current soundness of its financial standing and indicate its prospective long-term profitability.</p> <p><i>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</i></p>	Form D: Qualification Form

## Technical Evaluation Criteria

Evaluation Stages		Points Obtainable
1.	<b>Sample evaluation:</b> Only those offerors who obtain a minimum of 70% of the obtainable score of 400pts for the sample will continue with the 2 <sup>nd</sup> stage of technical proposal evaluation	400
2.	<b>Technical Proposal Evaluation:</b> Only those offerors who obtain minimum of 70% of the total obtainable score for the sample and technical proposal (stage 1 + stage 2) will be considered for financial evaluation	600
	<b>Total</b>	<b>1000</b>

Stage 1: Sample evaluation on editing services (Form E)		Points obtainable
1.1	Consistency and accuracy in the use of terminology	100
1.2	Research ability (consistency with HDR terminology)	100
1.3	Accuracy of grammar, spelling, punctuation	100
1.4	General tone and style	100
<b>Total Points-Stage 1:</b>		<b>400</b>

Stage 2: Technical Proposal Evaluation Summary (Form E)		Points obtainable
2.1	Bidder's qualification, capacity and experience	240
2.2	Proposed Methodology, approach and implementation plan	210
2.3	Management structure and key personnel	150
<b>Total Points-Stage 1:</b>		<b>600</b>

2.1: Bidder's qualification, capacity and experience (Form E)		Points obtainable
2.1.1	General Organizational Capability which is likely to affect implementation: years of establishment, loose consortium, subcontracting arrangement, holding company or one firm, size of the firm/organization, number of editors and desktop publishers available, strength of project management support e.g. project financing capacity and project management controls	50
2.1.2	Legal standing of the Offeror (Litigation and Arbitration history)	30
2.1.3	Relevance of Company's Specialized Knowledge and Experience (minimum 7 years), including three similar projects, particularly in domain of Human and Sustainable Development reporting. Work for UNDP/UN/ major multilateral/ or bilateral organizations will be an added value	130
2.1.4	Demonstrated client list with at least 3 comparable clients over the last 3 years?	30
<b>Total Section 1</b>		<b>240</b>

<b>2.2: Proposed Methodology, approach and implementation plan (Form E)</b>			<b>Points obtainable</b>
2.2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Does the proposal demonstrate Offeror's understanding on the workflow process?		120
2.2.2	Has the delivery time been addressed?		20
2.2.3	Has the quality assurance procedures and risk management been demonstrated?		50
2.2.4	Does the offeror have the tools/software and networks required to perform the work in this TOR		20
<b>Total Section 2</b>			<b>210</b>

<b>2.3: Management structure and key personnel (Form E)</b>			<b>Points obtainable</b>
2.3.1	Composition and structure of the team proposed. Are the proposed roles of the management and the team of key personnel suitable for the provision of the necessary services?		30
2.3.2	Qualifications of key personnel proposed		
2.3.2 a	<b>Managing Editor (Team Leader)</b>		50
	- 15 years of relevant experience; Relevant experience less than 15 years will be disqualified as per the eligibility criteria indicated on page 20-21.		
	- Specific Experience relevant to the assignment		
	- Regional/International experience		
	- Language Qualifications		
2.3.2 b	<b>Senior Editor**</b>		40
	- 10 years of relevant experience; Relevant experience less than 10 years will be disqualified as per the eligibility criteria indicated on page 20-21.	10	
	- Specific Experience relevant to the assignment (human development)	40	
	- Regional/International experience	20	
	- Language Qualifications	10	
2.3.2 c	<b>Copyeditor &amp; Layout Artist</b>		30
	- 7 years of relevant experience; Relevant experience less than 7 years will be disqualified as per the eligibility criteria indicated on page 20-21.	10	
	- Specific Experience relevant to the assignment	20	
	- Regional/International experience	10	
	- Language Qualifications	10	
<b>Total Section 3</b>			<b>150</b>

**\*\* Please include CV of editor who edited the Sample in Stage 1, who shall be employed as the main lead editor of the project.**

## Section 5. Terms of Reference

### EDITING AND PRODUCTION SERVICES FOR UNDP HUMAN DEVELOPMENT REPORT AND ITS OVERVIEW

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#### A. Background and Objective

The United Nations Development Programme (UNDP) is the UN's global development network, advocating for change and connecting countries to knowledge, experience and resources to help people build a better life.

UNDP is on the ground in some 170 countries and territories, supporting their own solutions to development challenges and developing national and local capacities that will help them achieve human development and the Sustainable Development Goals.

The mission of the UNDP's Human Development Report Office (HDRO) is to advance human development. The goal is to contribute towards the expansion of opportunities, choice and freedom. The office works towards this goal by promoting innovative new ideas, advocating practical policy changes, and constructively challenging policies and approaches that constrain human development. The office works with others to achieve change through writing and research, data analysis and presentation, support to national and regional analysis and outreach and advocacy work.

The HDR is one of the UN's most visible global reports. The report, released annually since 1990, receives wide acclaim and respect and must adhere to the highest professional rigor and standards. The quality of its statistical content links directly to the HDR's credibility and impact.

The reports are ensured of editorial independence by the United Nations General Assembly. This allows each report greater freedom to explore ideas and constructively challenge policies. The reports have also inspired national and regional analyses which, by their nature, usually address issues that are more country – or regionally – specific.

Over the last 30 years, HDRO has produced 26 global HDRs, supported the production of over 800 regional, national and sub-national HDRs, and advanced the human development agenda – enlarging people's choices – through trainings, conferences and other outreach initiatives. HDRs contributed to extending the frontiers of analytical thinking to a broader perspective of human well-being; to bringing people-centered policies and strategies into the global development discourses, debates and dialogues; to developing and applying human development indices and indicators by stimulating broader and better use of official statistics.

Each Report includes a comprehensive Statistical Annex with global indices and indicators including the Human Development Index (HDI) which is a measure of achievement in the basic dimensions of human development across countries.

#### B. Overview

Under the supervision of the UNDP Human Development Report Office (HDRO) production manager, and the overall guidance of the Director, HDRO, the Contractor will be responsible for:

- **Human Development Report 2020 (HDR 2020):** structural editing, substantive and technical editing, copy editing, layout and proofreading of the HDR 2020, including its statistical and technical annexes and the Overview of the Report; including editing all text in graphics, tables, figures, covers, titles, and maps provided by HDRO and incorporating these elements into the layout, preparing print-ready files of the English versions of the HDR 2020 and its Overview; and providing InDesign files,



InDesign Markup language files, and Web PDFs of the Report and Overview. This will include incorporating any corrections, comments or other additions or deletions as directed by the HDRO into the layout files after printing and supplying revised Web versions of both publications.

- **2020 Multidimensional Poverty Index (MPI) Publication:** copy editing, layout and proofreading.

### **C. Scope of work, deliverables and tentative schedule**

The contractor will undertake the following tasks:

#### **Part I: 2020 Human Development Report (HDR) and Overview:**

##### *Structural editing:*

- The Contractor will undertake structural review of the HDR 2020 draft from a human development perspective, lead a “wall-session” for the HDRO team, work with the authors to identify the main and supporting messages, see how the headings can reinforce those messages, determine sections to cut or shrink and come up with an agreed plan for structural and substantive edits. Propose and implement a chapter organization, consolidate different inputs, create chapters and develop a cohesive storyline.

##### *Substantive and technical editing:*

- Write chapter openings and transitions and edit for clarity, readability and consistency of message, including rewriting and deletions, noting ambiguities and substantive errors, abridging and restructuring text for greater readability, ensuring logical sequences, and eliminating repetition, add, delete, and rework headings to better reveal the line of argument.
- Ensure that there is a balance in the discussion in terms of diverse arguments, positive and negative examples, and overall consistency, and tighten the language ensuring neutral tone and style.
- Support the preparation of the overview and message-driven content plan.

##### *Copy-editing:*

Carry out copy-editing of the whole Report (front matter, narrative section, bibliography and notes, statistical back matter including statistical tables), ensuring correct grammar, syntax, and punctuation; accuracy and consistency in spelling, capitalization, and abbreviations; current terminology; correct and consistent use of footnotes, endnotes and references; accuracy and currency of URLs; and readability and consistency of logic and flow. Ensure the editorial integrity of all text, boxes, figures and other elements, and proofread the final manuscript.

*Layout:* The contractor will be responsible for review, alteration and typesetting of the Report (including the Statistical Annex tables), Overview and Technical notes:

- Review and alteration of the HDR 2020 layout template including:
  - Apply new color palette / make adjustments to: colors of chapter divider pages, headings text, pull quotes and special contribution boxes (4-color palette will be provided by HDRO)
  - Final size adjustments to the artwork, where necessary
  - Active Table of Contents in digital version.
  - Typesetting/layout of the report and overview
- Conversion to EPUB format (reflowable and fixed format EPUB)
  - Export file to the reflowable and fixed EPUB format

The final output will be as follows:

- Print-ready version of the Report and Overview (high resolution PDF and InDesign files)
- Digital version of the Report and Overview (PDF with active hyperlinks)
- Web ready version of the Technical notes (PDF)
- The report in reflowable and fixed EPUB formats

**Proofreading:** Once the Report and Overview are laid out the contractor will perform one or more rounds of proofreading, checking spelling, country and city names as well as acronyms and other abbreviations (making sure that they follow official UN terminology and conventions), style consistency, callouts, layout problems, references, etc.

### Scope

The 2020 HDR length: 284 pages for the report (including the statistical annex), 36 pages for the standalone Overview, 8 cover pages (2 covers), 8 pages for the Technical Notes document.

This comes to a total of laid-out ~340 pages and an estimated 151,000 words.

### Schedule

Structural editing is expected to take place between 20 April and 1 June 2020. Substantive and technical editing is expected to take place between 1 June and 15 August 2020. Copyediting, layout, and proofreading of the 2020 Human Development Report is expected to take place between 15 September and 1 November 2020 as per the following interim schedule.

*Note: The printing to take place in November 2020 (tentative), working days are an estimation.*

20 April to 31 May 2020	Structural editing (5 working days) and "wall session" (1 day at the HDRO office)
1 June to 15 August	Substantive and technical editing and writing (two rounds, 25 working days)
15 July to 30 August	Copyediting, layout, and proofreading of back matter and statistical annex (15 days)
15 to 30 September	Copyediting of the narrative section of the report (chapters) (15 days)
1 to 15 September	Copyediting of the standalone Overview (2 days)
1 to 10 October	Layout and proofreading of the Overview (5 days)
10 October to 1 November	Layout and proofreading of the Report (15 days)
2 to 5 November	Finalization of layout files, Report and Overview (3 days)

**\* Please note that this is a provisional schedule and that dates will be specified by HDRO to reflect the actual HDR 2020 finalization timeline. While the above schedule is tentative, the project completion date of 5 November 2020 cannot be changed as this will delay the print and distribution schedule of the Report.**

**Table 1: Inventory of Elements, English HDR 2020 and Overview (estimated)**

2020 REPORT	Words	Pages
<u>Narrative section:</u>		
Front matter (copyright page, team box, foreword, acknowledgements, contents)	3,000	10
Overview and introduction	12,000	28
Chapters	89,000	156
Graphics and tables	3,000	-
Notes and bibliography	13,000	14
<b>SUBTOTAL NARRATIVE SECTION</b>	<b>120,000</b>	<b>208</b>
<u>Statistical section:</u>		
Indicator tables (15)	15,000	66
Back matter text	10,000	10
<b>SUBTOTAL STATISTICAL SECTION</b>	<b>25,000</b>	<b>76</b>

+ COVER	1,000	4
+ Technical notes (online only)	4,000	8
<b>TOTAL 2020 REPORT</b>	<b>150,000</b>	<b>296</b>

<b>2020 OVERVIEW</b>	<b>Words</b>	<b>Pages</b>
TOC of HDR 2020 (repeated)		2
Foreword (repeated)		2
Text (includes repeated graphics and boxes) (repeated)		30
Tables and annexes	1,000	6
<b>TOTAL (non-repeated)</b>	<b>1,000</b>	<b>44</b>
+ COVER (text repeated from report)		4
<b>TOTAL 2020 REPORT AND OVERVIEW</b>	<b>151,000</b>	<b>340</b>

Total words to edit (estimated) = 151,000

Total pages for layout (estimated) = 340

## **PART II: 2020 Multidimensional Poverty Index (MPI) Publication:**

### *Copy-editing:*

Carry out copy-editing of the 2020 MPI publication (front matter, narrative section, bibliography, and notes), ensuring correct grammar, syntax, and punctuation; accuracy and consistency in spelling, capitalization, and abbreviations; current terminology; correct and consistent use of footnotes, endnotes and references; accuracy and currency of URLs; and readability and consistency of logic and flow. Ensure the editorial integrity of all text, boxes, figures and other elements, and proofread the final manuscript.

*Layout:* The contractor will be responsible for review, alteration, and typesetting of the Report (including the Statistical Annex tables), Overview and Technical notes:

- Review and alteration of the HDR 2020 layout template including:
  - Apply new color palette / make adjustments to: colors of chapter divider pages, headings text, pull quotes and special contribution boxes (4-color palette will be provided by HDRO)
  - Final size adjustments to the artwork, where necessary
  - Active Table of Contents in digital version.
  - Typesetting/layout of the report and overview

The contractor will deliver:

- Print-ready version of the MPI Publication (high-resolution PDF and InDesign files)
- Digital version of the Publication (PDF with active hyperlinks)

Total words to copyedit (estimated) = 15,000

Total pages for layout (estimated) = 20 plus 4 page cover

### **Schedule**

Copyediting, layout, and proofreading of the 2020 MPI are expected to take place between 5 June and 1 July 2020 as per the following interim schedule.

5 to 15 June 2020	Copyediting
15 to 22 June	Layout and proofreading
22 to 25 June	Finalization and preparation of digital and print-ready files

**\* Please note that this is a provisional schedule. While the above schedule is tentative, the project completion date of 25 June cannot be changed as this will delay the print and distribution schedule of the Report.**

#### **D. Expected outputs, price and schedule of payments**

Payment to the contractor will be processed based on expected outputs, i.e. upon delivery of the services specified below and deliverables accepted and certification of satisfactory completion by the UNDP Technical Manager.

##### **Part I: 2020 Human Development Report (HDR) and Overview:**

Deliverables	Timeline (estimated)	Percentage
Completed wall session, report outline and chapters structure and organization	Within 4 weeks of completion of services	5% of the contract amount for Part 1
Substantive editing completed chapters and overview	Within 4 weeks of completion of services	50% of the contract amount for Part 1
Copyediting and layout completed; print ready and digital files of the report and overview	Within 4 weeks of completion of services	45% of the contract amount for Part 1
		<b>100%</b>

##### **PART II: 2020 Multidimensional Poverty Index (MPI) Publication:**

Deliverables	Timeline (estimated)	Percentage
Copyediting and layout completed; print ready and digital files of the report and overview	Within 2 weeks of completion of services	100% of the contract amount for Part 2

**Condition for release of payment:** Within thirty (30) days from the date of meeting the following conditions:  
a) UNDP's written acceptance (i.e., not mere receipt) of the quality of the outputs; and  
b) Receipt of invoice from the Service Provider.

#### **E. Governance and Accountability**

The contractor will work under the supervision of the Production Manager of HDRO who will be the UNDP Technical Manager of this contract under the overall guidance of the Director, HDRO. The Contractor will be responsible for the fulfilment of deliverables as specified in this TOR.

The contractor will be in continuous contact with the Production Manager, HDRO, and report on progress on a weekly basis.

#### **F. Duty Station and Travel**

The work is expected to be performed at the contractor's location with one trip to UNDP Office in New York for a one-day meeting to deliver the 'wall-session' as explained above. The follow-up discussions, consultations and meetings will be held virtually.

**G. Facilities to be provided by UNDP**

UNDP will organize the venue for one-day wall session in New York. The contractor will be responsible for all costs related to the travel and accommodation of its staff during this trip.

**H. Expected duration of the contract/assignment**

UNDP intends to enter into a Long Term Agreement (LTA) with only one successful proposer for a period of three (3) years. The award of contract for each annual project is subject to UNDP needs, satisfactory contract performance and availability of budget.

**I. Approach and Methodology**

The bidders should include a detailed proposal of their approach and methodology, including a description of their approach for each phase of the report's editorial production, ensuring deadlines, quality assurance mechanisms, and other standard operating procedures.

**J. Professional Qualifications of the Successful Contractor and its key personnel**

The managing editor shall have a minimum of 15 years of relevant experience and demonstrate the experience leading similar human development/sustainable development projects, including leading structural editing and substantive editing work. The senior editor shall have a minimum of 10 years of relevant experience in editing of publications of similar size, scope and nature. The copyeditor and layout artist shall each have a minimum of 7 years of relevant experience working on publications of similar size, scope, and nature.

**K. Additional References or Resources**

2019 Human Development Reports can be found at this link: <http://hdr.undp.org/en/2019-report>

## Section 6: Returnable Bidding Forms / Checklist

This form serves as a checklist for preparation of your Proposal. Please complete the Returnable Bidding Forms in accordance with the instructions in the forms and return them as part of your Proposal submission. No alteration to format of forms shall be permitted and no substitution shall be accepted.

Before submitting your Proposal, please ensure compliance with the Proposal Submission instructions of the BDS 22.

### Technical Proposal Envelope:

<b>Have you duly completed all the Returnable Bidding Forms?</b>	
▪ Form A: Technical Proposal Submission Form	<input type="checkbox"/>
▪ Form B: Bidder Information Form	<input type="checkbox"/>
▪ Form C: Joint Venture/Consortium/ Association Information Form	<input type="checkbox"/>
▪ Form D: Qualification Form	<input type="checkbox"/>
▪ Form E: Format of Technical Proposal (including sample work in Exhibit 1)	<input type="checkbox"/>
<b>Have you provided the required documents to establish compliance with the evaluation criteria in Section 4?</b>	<input type="checkbox"/>

### Financial Proposal Envelope

**(Must be submitted in a separate sealed envelope/password protected email)**

▪ Form F: Financial Proposal Submission Form	<input type="checkbox"/>
▪ Form G: Financial Proposal Form	<input type="checkbox"/>

## Form A: Technical Proposal Submission Form

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

We, the undersigned, offer to provide the services for [Insert Title of services] in accordance with your Request for Proposal No. [Insert RFP Reference Number] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and our Financial Proposal sealed under a separate envelope.

We hereby declare that our firm, its affiliates or subsidiaries or employees, including any JV/Consortium /Association members or subcontractors or suppliers for any part of the contract:

- a) is not under procurement prohibition by the United Nations, including but not limited to prohibitions derived from the Compendium of United Nations Security Council Sanctions Lists;
- b) have not been suspended, debarred, sanctioned or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization;
- c) have no conflict of interest in accordance with Instruction to Bidders Clause 4;
- d) do not employ, or anticipate employing, any person(s) who is, or has been a UN staff member within the last year, if said UN staff member has or had prior professional dealings with our firm in his/her capacity as UN staff member within the last three years of service with the UN (in accordance with UN post-employment restrictions published in ST/SGB/2006/15);
- e) have not declared bankruptcy, are not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future;
- f) undertake not to engage in proscribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the UN or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the UN and we embrace the principles of the United Nations Supplier Code of Conduct and adhere to the principles of the United Nations Global Compact.

We declare that all the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this Proposal may lead to our disqualification and/or sanctioning by the UNDP.

We offer to provide services in conformity with the Bidding documents, including the UNDP General Conditions of Contract and in accordance with the Terms of Reference

Our Proposal shall be valid and remain binding upon us for the period of time specified in the Bid Data Sheet.

We understand and recognize that you are not bound to accept any Proposal you receive.

I, the undersigned, certify that I am duly authorized by [Insert Name of Bidder] to sign this Proposal and bind it should UNDP accept this Proposal.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

*[Stamp with official stamp of the Bidder]*

## Form B: Bidder Information Form

<b>Legal name of Bidder</b>	[Complete]
<b>Legal address</b>	[Complete]
<b>Year of registration</b>	[Complete]
<b>Bidder's Authorized Representative Information</b>	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
<b>Are you a UNGM registered vendor?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UGNM vendor number]
<b>Are you a UNDP vendor?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UNDP vendor number]
<b>Countries of operation</b>	[Complete]
<b>No. of full-time employees</b>	[Complete]
<b>Quality Assurance Certification (e.g. ISO 9000 or Equivalent) (If yes, provide a Copy of the valid Certificate):</b>	[Complete]
<b>Does your Company hold any accreditation such as ISO 14001 related to the environment? (If yes, provide a Copy of the valid Certificate):</b>	[Complete]
<b>Does your Company have a written Statement of its Environmental Policy? (If yes, provide a Copy)</b>	[Complete]
<b>Contact person UNDP may contact for requests for clarification during Proposal evaluation</b>	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
<b>Please attach the following documents:</b>	<ul style="list-style-type: none"> <li>▪ Company Profile, which should <u>not</u> exceed fifteen (15) pages, including printed brochures and product catalogues relevant to the goods/services being procured</li> <li>▪ Certificate of Incorporation/ Business Registration</li> <li>▪ Tax Registration/Payment Certificate issued by the Internal Revenue Authority evidencing that the Bidder is updated with its tax payment obligations, or Certificate of Tax exemption, if any such privilege is enjoyed by the Bidder</li> <li>▪ Trade name registration papers, if applicable</li> <li>▪ Local Government permit to locate and operate in assignment location, if applicable</li> <li>▪ Official Letter of Appointment as local representative, if Bidder is submitting a Bid in behalf of an entity located outside the country</li> <li>▪ Power of Attorney</li> </ul>



## Form C: Joint Venture/Consortium/Association Information Form

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

To be completed and returned with your Proposal if the Proposal is submitted as a Joint Venture/Consortium/Association.

No	Name of Partner and contact information (address, telephone numbers, fax numbers, e-mail address)	Proposed proportion of responsibilities (in %) and type of services to be performed
1	[Complete]	[Complete]
2	[Complete]	[Complete]
3	[Complete]	[Complete]

<b>Name of leading partner</b>  (with authority to bind the JV, Consortium, Association during the RFP process and, in the event a Contract is awarded, during contract execution)	[Complete]
--	------------

We have attached a copy of the below document signed by every partner, which details the likely legal structure of and the confirmation of joint and severable liability of the members of the said joint venture:

☐ Letter of intent to form a joint venture      **OR**      ☐ JV/Consortium/Association agreement

We hereby confirm that if the contract is awarded, all parties of the Joint Venture/Consortium/Association shall be jointly and severally liable to UNDP for the fulfillment of the provisions of the Contract.

Name of partner: \_\_\_\_\_ Name of partner: \_\_\_\_\_

Signature: \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_

Name of partner: \_\_\_\_\_ Name of partner: \_\_\_\_\_

Signature: \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_

Form D: Qualification Form

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

If JV/Consortium/Association, to be completed by each partner.

Historical Contract Non-Performance

☐ Contract non-performance did not occur for the last 3 years

☐ Contract(s) not performed for the last 3 years

Year	Non- performed portion of contract	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Reason(s) for non-performance:	

Litigation History (including pending litigation)

☐ No litigation history for the last 3 years

☐ Litigation History as indicated below

Year of dispute	Amount in dispute (in US\$)	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Matter in dispute: Party who initiated the dispute: Status of dispute: Party awarded if resolved:	

## Previous Relevant Experience

Please list at least three previous similar assignments successfully completed in the last 3 years.

List only those assignments for which the Bidder was legally contracted or sub-contracted by the Client as a company or was one of the Consortium/JV partners. Assignments completed by the Bidder's individual experts working privately or through other firms cannot be claimed as the relevant experience of the Bidder, or that of the Bidder's partners or sub-consultants, but can be claimed by the Experts themselves in their CVs. The Bidder should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if so requested by UNDP.

Project name & Country of Assignment	Client & Reference Contact Details	Contract Value	Period of activity and status	Types of activities undertaken

Bidders may also attach their own Project Data Sheets with more details for assignments above.

☐ Attached are the Statements of Satisfactory Performance from the Top 3 (three) Clients or more.

## Financial Standing

<b>Annual Turnover for the last 3 years</b>	Year	USD
	Year	USD
	Year	USD
<b>Latest Credit Rating (if any), indicate the source</b>		

Financial information (in US\$ equivalent)	Historic information for the last 3 years		
	Year 1	Year 2	Year 3
	<i>Information from Balance Sheet</i>		
Total Assets (TA)			
Total Liabilities (TL)			
Current Assets (CA)			
Current Liabilities (CL)			
	<i>Information from Income Statement</i>		
Total / Gross Revenue (TR)			
Profits Before Taxes (PBT)			
Net Profit			
Current Ratio			

☐ Attached are copies of the audited financial statements (balance sheets, including all related notes, and income statements) for the years required above complying with the following condition:

- a) Must reflect the financial situation of the Bidder or party to a JV, and not sister or parent companies;
- b) Historic financial statements must be audited by a certified public accountant;
- c) Historic financial statements must correspond to accounting periods already completed and audited.  
No statements for partial periods shall be accepted.

## Form E: Format of Technical Proposal

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

The Bidder's proposal should be organized to follow this format of Technical Proposal. Where the bidder is presented with a requirement or asked to use a specific approach, the bidder must not only state its acceptance, but also describe how it intends to comply with the requirements. Where a descriptive response is requested, failure to provide the same will be viewed as non-responsive.

### Stage 1: Sample evaluation

Please provide a sample of editing and layout working using the sample document provided in **Exhibit 1**.

### Stage 2: Technical proposal

#### 2.1: Bidder's qualification, capacity and expertise

2.1.1 Brief description of the organization, including the year and country of incorporation, and types of activities undertaken. General organizational capability which is likely to affect implementation: years of establishment, loose consortium, subcontracting arrangement, holding company or one firm, size of the firm/organization, number of editors and desktop publishers available, strength of project management support e.g. project financing capacity and project management controls. Explain whether any work would be subcontracted, to whom, how much percentage of the work, the rationale for such, and the roles of the proposed sub-contractors and how everyone will function as a team.

2.1.2 Legal standing of the Offeror (Litigation and Arbitration history). Include any history of litigation and arbitration in which the organisation / firm has been involved that could adversely affect or impact the performance of services, indicating the status/result of such litigation/arbitration.

2.1.3 Relevance of Company's Specialized Knowledge and Experience (minimum 7 years) on Similar Projects, particularly in domain of Human and Sustainable Development reporting. Explain if your company has implemented any work for UNDP/UN/ major multilateral/ or bilateral programmes.

Brief description and list of at least 3 similar projects with various clients including contract amount. The Offeror shall demonstrate its corporate capability with regard to the requirements of the Terms of Reference. Include a description of your present and ongoing contracts that have a direct relationship to this requirement.

Project	Client	Contract Value	Period of activity (from/to)	Role on the Project	Reference Contact Details (Name, Phone, Email)
1-					
2-					
3-					

2.1.4 Provide a list of at least 3 comparable clients over the last 3 years.

Project	Client	Contract Value	Period of activity (from/to)	Role on the Project	Reference Contact Details (Name, Phone, Email)
1-					
2-					
3-					

## 2.2: Proposed Methodology, Approach and Implementation Plan

This section should demonstrate the bidder's responsiveness to the TOR by identifying the specific components proposed, addressing the requirements, providing a detailed description of the essential performance characteristics proposed and demonstrating how the proposed approach and methodology meets or exceeds the requirements. All important aspects should be addressed in sufficient detail and different components of the project should be adequately weighted relative to one another.

2.2.1 A detailed description of the approach and methodology for how the Bidder will achieve the Terms of Reference of the project, keeping in mind the appropriateness to conditions and project environment. Details how the different service elements shall be organized, controlled and delivered with a clear explanation of the workflow process.

2.2.2 Implementation plan including a Gantt chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing.

2.2.3 The methodology shall also include details of the Bidder's internal technical and quality assurance review mechanisms as well as relevant risk management measures.

2.2.4 Description of available tools/software and networks available for the performance of the deliverables under this TOR; how they shall be adopted and used for this specific requirement.

2.2.5 Any other comments or information regarding the project approach and methodology that will be adopted.

## 2.3: Management Structure and Key Personnel

2.3.1 Describe the overall management approach toward planning and implementing the project. Include an organization chart for the management of the project describing the relationship of key positions and designations. Provide a spreadsheet to show the activities of each personnel and the time allocated for his/her involvement.

2.3.2 Provide CVs for key personnel that will be provided to support the implementation of this project using the format below. CVs should demonstrate qualifications in areas relevant to the Scope of Services. Please include CV of editor who edited the Sample in Stage 1, who shall be employed as the main lead editor of the project.

## Format for CV of Proposed Key Personnel

<b>Name of Personnel</b>	[Insert]
<b>Position for this assignment</b>	[Insert]
<b>Nationality</b>	[Insert]
<b>Language proficiency</b>	[Insert]
<b>Education/ Qualifications</b>	<i>[Summarize college/university and other specialized education of personnel member, giving names of schools, dates attended, and degrees/qualifications obtained.]</i> [Insert]
<b>Professional certifications</b>	<i>[Provide details of professional certifications relevant to the scope of services]</i> <ul style="list-style-type: none"> <li>▪ Name of institution: [Insert]</li> <li>▪ Date of certification: [Insert]</li> </ul>
<b>Employment Record/ Experience</b>	<i>[List all positions held by personnel (starting with present position, list in reverse order), giving dates, names of employing organization, title of position held and location of employment. For experience in last five years, detail the type of activities performed, degree of responsibilities, location of assignments and any other information or professional experience considered pertinent for this assignment.]</i> [Insert]
<b>References</b>	<i>[Provide names, addresses, phone and email contact information for two (2) references]</i> Reference 1: [Insert]  Reference 2: [Insert]

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe my qualifications, my experiences, and other relevant information about myself.

\_\_\_\_\_  
Signature of Personnel

\_\_\_\_\_  
Date (Day/Month/Year)

**Note:** No substitution of personnel will be tolerated once the contract has been awarded except in extreme circumstances and with the written approval of the UNDP. If substitution is unavoidable it will be with a person who, in the opinion of the UNDP project manager, is at least as experienced as the person being replaced, and subject to the approval of UNDP. No increase in costs will be considered as a result of any substitution.

**Form F: Financial Proposal Submission Form**

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

We, the undersigned, offer to provide the services for [Insert Title of services] in accordance with your Request for Proposal No. [Insert RFP Reference Number] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and our Financial Proposal sealed under a separate envelope.

Our attached Financial Proposal is for the sum of [Insert amount in words and figures].

Our Proposal shall be valid and remain binding upon us for the period of time specified in the Bid Data Sheet.

We understand you are not bound to accept any Proposal you receive.

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_  
Signature: \_\_\_\_\_

*[Stamp with official stamp of the Bidder]*



Form G: Financial Proposal Form

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

The Bidder is required to prepare the Financial Proposal following the below format and submit it in an envelope separate from the Technical Proposal as indicated in the Instruction to Bidders. Any Financial information provided in the Technical Proposal shall lead to Bidder’s disqualification.

The Financial Proposal should align with the requirements in the Terms of Reference and the Bidder’s Technical Proposal.

Currency of the proposal: **United States Dollars (USD)**

Table 1: Summary of Overall Prices

	Amount(s)
Professional Fees (from Table 1a)	
Other Costs (from Table 1b)	
Total Amount of Financial Proposal	

Table 1a: Breakdown of Professional Fees

Name	Title	Unit Rate	Quantity (No. of Days)	Total Amount
		A	B	C=A+B
	Managing Editor			
	Senior Editor			
	Layout Artist			
	Copyeditor			
Subtotal Professional Fees:				

Table 1b: Breakdown of Travel and related costs

Description	UOM	Quantity	Unit Price	Total Amount
Ticket cost	Trip	1		
Subsistence allowance	Day			
Local transportation costs	Lump Sum			
Other Costs: (please specify)				
Subtotal Other Costs:				

**Table 2: Breakdown of Price per Deliverable/Activity\***

No.	Deliverable/ Activity description	Time (person days)	Professional Fees	Other Costs	Total	Percentage
1.	HDR Wall session and structural editing					
2.	HDR (Report and Overview) Substantive editing					
3.	HDR (Report and Overview) Copyediting and layout					
4.	HDR (Report and Overview) Proofreading layout					
5.	MPI Publication Copyediting and layout					
<b>Total lumpsum contract value</b>						

**\* This will be the basis for payment tranches**

**Table 3: PRICE CONSIDERATIONS**

The Bidders should specify whether the prices would remain firm for the entire contract period, or alternatively, they should indicate a maximum yearly increase rate.

**For the 2<sup>nd</sup> year of the contract [please check one]**

- ☐ the prices will remain fixed for the duration of the contract
- ☐ the prices will increase yearly by a maximum percentage of \_\_\_\_% [specify] **from the 1<sup>st</sup> year**, which includes the overhead cost.

**For the 3<sup>rd</sup> year of the contract [please check one]**

- ☐ the prices will remain fixed for the duration of the contract
- ☐ the prices will increase yearly by a maximum percentage of \_\_\_\_% [specify] **from the 2<sup>nd</sup> year**, which includes the overhead cost.

**For the 4<sup>th</sup> year of the contract [please check one]**

- ☐ the prices will remain fixed for the duration of the contract
- ☐ the prices will increase yearly by a maximum percentage of \_\_\_\_% [specify] **from the 3<sup>rd</sup> year**, which includes the overhead cost.

**For the 5<sup>th</sup> year of the contract [please check one]**

- ☐ the prices will remain fixed for the duration of the contract
- ☐ the prices will increase yearly by a maximum percentage of \_\_\_\_% [specify] **from the 4<sup>th</sup> year**, which includes the overhead cost.

**Table 4: Additional author's alterations rates (expressed in hourly rates)**

Please note that these rates will be used when and if additional changes is required after acceptance of work by UNDP. This rate shall not be part of the evaluation of the tender but will be part of the contract.

No.	Title/role	Unit Rate (per hour)
1.	Managing Editor	
2.	Senior Editor	
3.	Layout Artist	
4.	Copyeditor	