Republic of Uruguay
Ministry of Economy and Finance

REQUEST FOR EXPRESSIONS OF INTEREST
(CONSULTING SERVICES – SELECTION OF FIRMS)

REPUBLIC OF URUGUAY
BUDGET AND FINANCIAL MANAGEMENT PROGRAM
IDB LOAN No.4705/OC-UR

Call to Consulting Firms to submit Expressions of Interest to be part of a Shortlist to perform the Consultancy "*Technology update of the ODOO CORE VERTICAL ESTADO URUGUAY product from the baseline version Odoo v8 to the Odoo Community v12 version".*

The Government of the Republic of Uruguay has received financing from the Interamerican Development Bank for the "Budget and Financial Management Program", and the Ministry of Economy and Finance will use some of those funds to finance the procurement of consulting services.

The Ministry of Economy and Finance (MEF) hereby invites the eligible consulting firms to express their interest in providing the requested services. The interested consulting firms shall provide information indicating that they are qualified to render such services.

The outcome of this consultancy shall be **"*Technology update of the ODOO CORE VERTICAL ESTADO URUGUAY product from the baseline version Odoo v8 to the Odoo Community v12 version*"**.

Main Goal:

The main goal of the call is the procurement of consulting services for the technological update of the management software *ODOO CORE VERTICAL ESTADO URUGUAY* (GRP Uruguay) from baseline version Odoo v8.0 to version Odoo Community v12.

Specific Aims of the Consultancy:

It is expected that the consultants have a very good knowledge of the baseline versions of Odoo and sufficient functional knowledge about the product ***ODOO CORE VERTICAL ESTADO URUGUAY*** to allow them to update this source code from its baseline version Odoo v8 to version Odoo Community v12 by making the necessary changes so as to respect and ensure both the compatibly with the new version Odoo v12 and the quality of the product, as well as the preservation of 100% of its functionality. The main activities to perform during the consultancy are:

Analysis of the Migration Requirements and Definition of the Strategy

The goal of this activity is to carry out a comprehensive analysis of the current code of the *ODOO CORE VERTICAL ESTADO URUGUAY* in order to determine all the necessary changes on the current product in order to comply with:

1. Adapting it from a baseline version of Odoo v8 to an Odoo Community v12 version using all the possibilities and features offered by the latter. [1]

[1] *A technological upgrade of the product is considered, but without migrating the deployments from previous versions, i.e. the upgrade should be compatible with the data of current v8.0 deployments.*

2. Making all necessary changes so that the architecture and code of *ODOO CORE VERTICAL ESTADO URUGUAY* complies with the Quality Standards of both the OCA and the Uruguayan Government[2].
3. Correcting functional weaknesses already identified in version 8.0 (e.g.: setting up accounting entries with some level of parameterization, improving the security system, identifying transactions at the level of executing units and offices)

- **Product Migration**

1. Delivering an operational version with 100% of the current functionality of *THE ODOO CORE VERTICAL ESTADO URUGUAY* based on Odoo Community v12.

2. Delivering a version of the *Odoo CORE Vertical Estado Uruguay* product that has passed the quality tests determined by the OCA as acceptable and all of the quality standards required by the Uruguayan Government as well as all the products associated with the development and subsequent deployment of this solution.

- **Deployment of a Test Prototype and Validation**

1. Deploying, updating, and configuring a test environment to validate the new version of the solution.
2. Making the necessary adjustments so that the solution can be validated (bug fixes, improvements, or redesigns)

THE **CRITERIA FOR THE SELECTION OF THE SHORTLIST** ARE AS FOLLOWS:

1) **Company background.** This background shall be submitted in ANNEX I (pages 5-7) indicating the requested information for each project. Additionally, this information shall be elaborated on in a second document, indicating in detail the activities carried out and any other information deemed important, identifying the projects with the same number (Field "#") in both documents, to allow them to be easily identified and related. The format of ANNEX I is detailed in this document (pages 5--7).

   A maximum of 20 projects developed within the last 5 years shall be assessed, where the following shall be evaluated:

   - ODOO Partner and member or contributor of the OCA.
   - Verifiable experience in the development of Odoo customizations (preferable in Odoo ERP modules and in versions 8 - 12).
   - Verifiable experience in Odoo deployments (the experience with Odoo ERP modules and versions 8 – 12 shall be especially valued).
   - Verifiable experience in projects with public or government entities (Odoo projects and those with Latin American countries shall be especially valued).
   - Verifiable experience in Odoo version migration projects (those made from version 8 to 12, as well as Odoo customizations similar to the work requested shall be especially valued).
   - Verifiable experience in the development and/or deployments of the *ODOO CORE VERTICAL ESTADO URUGUAY* product.

Additionally, a note (signed by the legal representative of the company) declaring to be empowered to exercise trade acts, with the following information, shall be submitted:

   a. Nationality (in case of being Uruguayan, it shall be a commercial company constituted in the country, under any of the company types established in the Code of Commerce, in Law 16,060 of September 5, 1989 and related regulations).

[2] *These standards will be part of the terms of reference.*

b. Address.
c. Phone number and e-mail address.
d. Company name and RUT ("Single Tax Registration" for Uruguayan firms or its equivalent for foreign companies).

The consulting firms may partner with other companies under the form of Participation in Partnership, Consortium or Association (APCA in Spanish), with the purpose of improving their qualifications. The consulting firms selected to integrate the Short List must register with the RUPE (Sole Registry for Government Providers), in order to be able to enter into contracts with this Ministry[3].

It is the responsibility of the firm to warrant that its experts, the members of the Association or Joint venture (Participation in Partnership, Consortium or Association), sub consultants, agents (whether declared or not), service providers, suppliers and/or employees comply with the eligibility requirements.

This instance of the process does not require the submission of information related to the human resources of the consulting firms, nor on a methodology or working plan. The information submitted relating to these matters shall not be taken into consideration.

This call is focused on the hiring of a consulting firm, using the procedure of **Quality and Cost Based Selection (QCBS)**, pursuant to Section II (2.1 to 2.30) of the Policies for the Selection and Contracting of Consultants Financed by the Inter-American Development Bank (GN-2350-9). This requires pre-qualifying within a short list of 6 firms interested in submitting the respective offers.
https://www.iadb.org/en/projects/project-procurement
http://idbdocs.iadb.org/wsdocs/getdocument.aspx?docnum=774394

The expressions of interest shall be submitted to "***Unidad Coordinadora de Proyectos, Sector Adquisiciones***", Colonia 1089 Planta Baja (personally or by mail), or by e-mail to ucp.llamados@mef.gub.uy, **at the latest by October 17, 2019 at noon.** In case of submitting them personally or by mail, **a printed original and a copy** (with numbered pages) and **a copy on a magnetic medium of the signed original** (in PDF format) is required. In case of discrepancies between both versions, the printed version shall prevail.

The subject of the e-mails shall be: *Expresión de Interés:* ***"Actualización tecnológica del producto ODOO CORE VERTICAL ESTADO URUGUAY desde la versión de base Odoo v8 a la versión Odoo Community v12".***

The envelopes (in case of personal delivery or by mail) shall be identified on their outside as follows:

UNIDAD COORDINADORA DE PROYECTOS - MEF
At.: PROGRAMA DE GESTION PRESUPUESTARIA Y FINANCIERA
COLONIA 1089 PLANTA BAJA – CP 11.100 - MONTEVIDEO -URUGUAY

Proceso**: *"Actualización tecnológica del producto ODOO CORE VERTICAL ESTADO URUGUAY desde la versión de base Odoo v8 a la versión Odoo Community v12"*.**

[3] For more information about the registration visit the portal of the Agencia de Compras y Contrataciones del Estado (ACCE), entity responsible for the operation of the RUPE. Direct link to the registration guides: http://www.comprasestatales.red.uy/inicio/proveedores/rupe/como-inscribirse/ .
Keep in mind that all suppliers registered in the Table of Beneficiaries of the SIIF will be automatically registered in the RUPE, under the status "in process of registration", but need to complete the registration and become "active" in the system. It will be necessary to have at least the status of "in process of registration" to be able to bid and be awarded in procurement procedures.

Questions and clarifications will only be received via e-mail, addressed to the following e-mail address: ucp.llamados@mef.gub.uy , **until October 11, 2019**. The answers shall be published together with their question on the website of the State Procurement and Contracting Agency (ACCE in spanish) and on the web of the Ministry of Economy and Finance. (https://www.mef.gub.uy) (https://www.comprasestatales.gub.uy/consultas/)

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ANNEX I

Name																						
	Project	Client	Contact	Phone	Function	Country	Government Office	ODOO Version	License	Type of Project	Duration	Contract Amount	Quantity of impacted users	GRP/ ERP	CORE URUGUAY	MODULES							
																Procurements	Contracts	Financial	Inventory & Fixed Assets	Budget	Treasury	Travel expenses	Other Modules
	2,00	PP/CS/SC																					
1	Project	Client 1			Subcontractor	Uruguay	YES	v8	Enterprise	Deployment	10 months	230000	800	YES	NO	YES	NO	NO	NO	NO	YES	NO	YES
2	Project	Client 2			Main Supplier	Uruguay	NO	v10	Community	Customization migration	3 months	100000	30	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES

Field	Description	Notes
#	Identifier	A correlative number from 1 to 20 shall be kept.
Project	Name or Goal of the Project	It is recommended to use a descriptive name that allows understanding the Project's general goal.
Client	Company Name or Commercial Name	It is recommended to use a descriptive name that best identifies the client.
Contact Person	Position and Name of the Contact Person	The client's financial/accounting officer or project manager who participated in the Project shall be identified.
Phone Number of the Contact Person	Country code and phone	A telephone belonging to the client which allows contacting the Contact Person shall be indicated.
Country	Name of the country	Name of the country where the Project was carried out.
Public Administration	YES / NO	Indicate if the Project was carried out at a Public Administration Office or Agency.
Function	PP / SC / CO	Indicate the function of the consulting firm using the following criteria: PP = Main Supplier SC = Subcontractor CS = Consortium
Duration	Start date – End date	Indicate the Project's total duration
Price	Estimated price of the project	This figure is an estimate, it need not be the real amount but it should represent the significance of the Project
General Description	General Description of the Project	General Description of the Project indicating the overall goal and the specific goals.
Project's team	Key task force assigned to the Project	Indicate the number of people and the profiles involved.
Type of Project	Migration/Deployment /Customization development/ etc.	Indicate the type of Project carried out; it is recommended to classify the Project in only one most representative category.
Quantity of users	Number of users impacted by the Project	Indicate how many users were affected by the Project in real terms, not in terms of the total number of the system's users.
Odoo Version	Odoo version used	Indicate in which version/s the Project was developed.
GRP/ERP	YES/NO	Indicate whether the Project was a management system like GRP/ERP
Odoo CORE Vertical Estado Uruguay	YES/NO	Indicate if the Project had (as a goal) a management system running on the product Odoo CORE Vertical Estado Uruguay (if it was related to the "Odoo Core Vertical Estado Uruguay" product.

Modules	YES/ NO	“Indicate the modules included in the deployment of the tool
Other Modules	Other modules description	Indicate if the implemented tool included other Odoo modules, other Odoo community contributions, or other Odoo developments.