



Republic of Uruguay
Ministry of Economy and Finance
Directorate General Secretariat

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 for Consulting Firms regarding Expressions of Interests to be part of a Shortlist in order 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 to provide 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 Objective:

The main objective 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 Objectives of the Consultancy:

It is expected that the consultants have a very good knowledge of the baseline versions of Odoo and have an enough functional knowledge about the product Odoo CORE Vertical Estado Uruguay that allows them to update this source code from its baseline version Odoo v8 to version Odoo Community v12 by making the necessary changes to respect and ensure both the compatibility with the new version Odoo v12 and the quality product, as well as the preservation of 100% of its functionality. The main activities to perform during the consultancy are:

Migration requirements analysis and strategy definition

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 that the latter offers.¹

¹ A technological upgrade of the product is considered but the migration of deployments from previous versions is not intended, that is to say, 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 so that it complies with the Quality Standards of both the OCA and the Uruguayan Government².
3. Correcting functional weaknesses already identified in version 8.0 (e.g.: setting up accounting entries with some level of parameterization, improving the security scheme, identifying transactions at the executing unit and office level)

- **Product Migration**

1. Delivering an operational version with 100% of the current features of the Odoo CORE Vertical Estado Uruguay on a baseline version of 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 100% 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) **Background of the firm.** This background shall be submitted in ANNEX I (pages 5 to 7) indicating the requested information for each project. Additionally, this information must be extended in a second document indicating in detail the activities carried out and any other information deemed important, identifying the projects under the same Number (Field #) in both documents, so as to allow them to be easily identified and related. The format of ANNEX I is detailed in this document (pages 5 to 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 OCA.
- Verifiable experience in the development of Odoo customizations (preferable in Odoo ERP modules and in versions 8 - 12).
- Verifiable experience in Odoo deployments (especially valuing the experience in Odoo ERP modules and in versions 8 - 12).
- Verifiable experience in projects with public or Government entities (especially valuing Odoo projects and those with Latin American countries).
- Verifiable experience in Odoo version migration projects (assessing those made between version 8 and 12, as well as those made on customizations made on Odoo that are similar to the work requested).
- 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, must be submitted:

²These standards will be part of the terms of reference.



- 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 the Law 16.060 of September 5, 1989 and related regulations).
- b. Address.
- c. Phone number and e-mail address.
- d. Firm name and RUT ("Single Tax Registration" for Uruguayan firms or its equivalent for foreign firms).

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. Consulting firms selected to integrate the Short List must register with the RUPE (Sole Registry for Government Providers), in order to be able to contract with this agency 3.

It is the responsibility of the firm to guarantee that its experts, the members of the APCA (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 presented in reference to these matters shall not be taken into consideration.

This call is focused on the procurement of a consulting firm, using the procedure of **Selection Based on the Consultants Qualifications (CQS)**, pursuant to Section 3.7 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 bidders interested in submitting the respective offers.

<https://www.iadb.org/es/projects/adquisiciones-de-proyectos>

<https://www.iadb.org/es/acerca-del-bid/seleccion-y-contratacion-de-consultores-%2C6747.html>

The expressions of interest shall be submitted to Unidad Coordinadora de Proyectos, Sector Adquisiciones, Colonia 1089 Planta Baja (personally or by postal mail), or by e-mail at ucp.llamados@mef.gub.uy , **at the latest by October 07, 2019 at 12:00**. In case of submitting them personally or by postal mail, **a printed original and a copy (with pages numbered) and a copy on magnetic media of the signed original** (in PDF format) is required. In case of discrepancies between both versions, the printed version shall prevail.

E-mails shall be identified in the Subject field under the following caption: Expression of Interest (EOI): **"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 postal mail) must be identified on their outside by the following captions:

Name of the Office: UNIDAD COORDINADORA DE PROYECTOS - MEF

Care of: PROGRAMA DE GESTION PRESUPUESTARIA Y FINANCIERA

Address: COLONIA 1089 PLANTA BAJA – CP 11.100 - MONTEVIDEO -URUGUAY

³ For more information about the application visit the portal of Agencia de Compras y Contrataciones del Estado (ACCE), entity responsible for the operation of RUPE.

Direct link to application guides: <http://www.comprasestatales.red.uy/inicio/proveedores/rupe/como-inscribirse/> .

Keep in mind that all suppliers registered in the Table of Beneficiaries of SIIF will automatically be in RUPE, under the status "enrolling", but shall complete the application and become "active" in the system. It will be necessary to be at least in the status of "enrolling" to be able to bid and be awarded at procurement procedures.

Process: “Technology update of the Odoo CORE Vertical Estado Uruguay product from the baseline version Odoo v8 to the Odoo Community v12 version”.

Queries and clarifications will only be received via e-mail, addressed to the following e-mail address: ucp.llamados@mef.gub.uy , **until 5 working days previous** to the date of reception of the Expressions of Interest (until September 30, 2019). The answers to the questions shall be published together with their question on the website of the Ministry of Economy and Finance. (<https://www.mef.gub.uy>).



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ANEX I

| Field | Description | Notes |
|--|---|---|
| # | Identifier | A correlative number from 1 to 20 must be kept. |
| Project | Name or Objective of the Project | It is recommended to use a descriptive name that allows understanding the Project's general objective. |
| Client | Firm Name or Commercial Name | It is recommended to use the description that best identifies the client. |
| Reference | Position and Name of the Reference | The Reference or the financial/accounting officer or the Project manager with participation in the Client Project must be identified. |
| Reference's phone number | Country code and phone | A Client owned telephone number must be indicated that allows contacting the "Reference" for requesting references. |
| Country | Name of the country | Name of the country where the Project was carried out. |
| Government Office | YES / NO | Indicate if the Project was carried out at a Government Office. |
| Function | PP / SC / CO | Indicate the function performed by the consultant within the Project's framework under the following criteria: PP = Main supplier SC = Subcontractor CS = Consortium |
| Duration | Start date – End date | Indicate the Project's total duration |
| Amount | Estimated amount of the project | This figure is an estimate, it need not be the real value but representative of the order of magnitude of the Project |
| General Description | General Description of the Project | General Description of the Project indicating the overall objective and specific objectives. |
| Project's team | Key task force assigned to the Project | Indicate number of people and the profiles involved. |
| Type of Project | Migration/Deployment /Customization development/ etc. | Indicate the type of the Project carried out, it is recommended to categorize the Project in only one category, this being the most representative. |
| Quantity of users | Quantity of users impacted by the Project | Indicate how many users were affected by the Project in real terms, but not in terms of the total number of the system's users. |
| Odoo Version | Identifier of the employed Odoo version | Indicate in which version/s the Project was developed. |
| GRP/ERP | YES/NO | Indicate if the Project had as an objective a management system like ERP/GRP |
| Odoo CORE Vertical Estado Uruguay | YES/NO | Indicate if the Project had as an objective a management system running on the product Odoo CORE |



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| | | Vertical Estado Uruguay |
| Modules | YES/ NO | Indicate whether the implemented tool included or not the module related to those indicated in the previous table. |
| Other Modules | Other modules description | Indicate if the implemented tool included other Odoo modules, other community contributions, or other Odoo developments. |