

 جامعة الشارقة UNIVERSITY OF SHARJAH	Policy Main Title	Fiscal Resources and Procurement	Effective Date	1/10/2021
	Policy Subject	Procurement Management and Sourcing Method	Last Review date	10/12/2025
	Policy Number	FRP-17	Next Review date	10/03/2028
	Responsible Entity	Procurement and Supply Chain Department	Approved By	VCFAA

Overview

This policy outlines the procurement management and process. Clear and well-defined procurement activities and processes will enable the P&SC Department to understand and meet End Users' requirements and future needs while providing better visibility into spending patterns and budgets. It will also assist the P&SC Department in effectively leveraging additional cash flow by negotiating better contracts' terms with vendors and improve UOS's purchasing power and return on investment over the long term. This policy covers the type of sourcing methods and criteria.

Scope

This policy applies to all procurement team members. The scope of this section is applicable to all UOS departments and sections, and covers the following:

- New Item Code Creation.
- Purchase Requisition (PR) Management (including unplanned and emergency purchases).
- Sourcing Method.

Purpose

The main purpose of this policy is to:

- Support the Procurement Team in identifying End Users' requirements based on a robust and formal process relying on an accurate and concise scope of work and cost estimation.
- Assist the Procurement Team in increasing the overall efficiency of the requisition process during the procurement lifecycle.
- Support the Procurement Team in identifying suitable vendors who are capable to deliver within an agreed upon criteria and parameters through a fair, transparent and competitive bidding process.
- Enable the sourcing of procurement requirements through an entrusted purchasing process aiming to secure a competitive advantage with vendors during the procurement of material / services / projects requested by end users.
- Support the Procurement Team in seeking better contracts' terms with vendors by identifying a clear baseline for negotiation backed by an adequate and effective negotiation process conducted by a qualified team.

Abbreviations and Definitions

UOS: University of Sharjah.

DOA: Delegation of Authority.

PR: Purchase Requisition.

RFQ: Request for Quotation.

RFP: Request for Proposal.

RFX: Type of Request (RFQ or RFP).

BOQ: Bill of Quantity.

TOR: Terms of Reference.

SOW: Statement of Work.

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RFI: Request for Information.

PC: Procurement Committee.

Policy

- The Procurement Team shall consider the PR process as an extension of all the efforts made during the development of the Annual Procurement.
- End Users shall be responsible to raise the PRs as per the defined timeline agreed during the Annual Procurement Planning exercise.
- No purchases shall be made by UOS without raising a PR by End User and routed to the Procurement Team through the system.
- All raised PRs shall be reviewed and approved by the authorized personnel within the concerned business / requesting unit and other relevant business units considered as subject matter experts depending on the type of procurement requirement (i.e. Engineering, IT, etc.) in line with the DOA prior to raising the PR to the Procurement Team.
- The Procurement Team shall consider the most suitable sourcing method when approaching the market based on the nature, value and availability of vendors who are able to meet UOS's quality standards and requirements for the provision of goods / material / services requisition.
- Sourcing method shall be selected in line with the annual procurement plan and after consultation with the end users (where required) during the procurement planning process.
- The Procurement Team shall use the UOS sourcing method during the sourcing process based on the UOS criteria.

Procedures

Upon the identification of a new item required by End User during the procurement planning exercise and prior to raising the respective purchase requisition "PR", End User shall raise a request a "New Item Code Creation" to the Warehouse and Inventory Team (for goods / material) and to the Procurement Team (for service / CAPEX) after getting the approval from the respective authority within the End User's department, in order to create a new item code on the system. Such request shall include the following:

- Item Category;
- item type (CAPEX, OPEX, etc.);
- Department name;
- Item / service Description;
- Item size; (i.e. physical dimension of the item such as length, width);
- Manufacturer's name (i.e. OEM, distributor or vendor, etc.);
- Item pictures and visual other identification details (if any).

The Warehouse and Inventory / Procurement Team shall scrutinize and search for similar items in the item library based on the partial matching of name / description to identify whether items with similar specifications and characteristics do not pre-exist prior to creating a unique item code on the system within (3) working days from the request date

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Purchase Requisition Management

- The Procurement Team shall consider the PR process as an extension of all the efforts made during the development of the Annual Procurement Plan and shall scrutinize the PRs received against those budgeted and discussed with End Users during the procurement planning exercise.
- End Users shall be responsible to raise the PRs as per the defined timeline agreed during the Annual Procurement Planning exercise.
- No purchases shall be made by UOS without raising a PR by End User and routed to the Procurement Team through the system.
- All raised PRs shall be reviewed and approved by the authorized personnel within the concerned business / requesting unit and other relevant business units considered as subject matter experts depending on the type of procurement requirement (i.e. Engineering, IT, etc.) in line with the DOA prior to raising the PR to the Procurement Team.
- End Users are strictly prohibited to split their PRs into smaller values in order to bypass the required approvals specified in the DOA.
- The Procurement Team shall always compare the PR received from End User with the approved annual procurement plan in order to ensure that no splitting of PRs has been made by end users upon requisition.
- In case of divergence, the Procurement Team shall inquire End User about the reason of splitting the PR into smaller values. If deemed inappropriate, End User shall revise the PR in line with approved annual procurement plan and resubmit it to the Procurement Team in order to proceed with the requisition process.
- Each PR shall include, at a minimum, the following elements in line with the annual procurement plan:
 - Reference number;
 - Issuance date;
 - Requestor name, position;
 - Department name;
 - Type of purchase requisition (new PR, PR change request);
 - Categorization of purchases (planned / unplanned purchases);
 - Standard PR or Emergency PR (immediate, critical or urgent);
 - Item code;
 - Category of items (i.e. goods / material, equipment, labor, others);
 - Item type (Opex / Capex);
 - Goods / material / service or project description;
 - Requested quantity / number of units;
 - Type of RFX required (RFQ or RFP);
 - Target delivery date;
 - Any other relevant information or special instruction such as that can influence the PR process; and
 - Attachment including Scope document (Bill of Quantity (BOQ), Terms of Reference (TOR) or Required Statement of Work (SOW)).

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- End Users shall ensure providing adequate time to the Procurement Team to process the RFQ / RFP and proceed with the awarding process; and allow a timely delivery of the expected project / service / material.
- The estimated process time and expected start / delivery timelines shall be discussed and agreed with End Users as part of the Annual Procurement Plan.
- The Procurement Team shall review the PRs raised by End User within the agreed timeline from the issuance date in line with the DOA.
- The Procurement Team shall reconcile, where applicable, the available stock (goods / material) in hand in the system against the quantity requested by End User upon the receipt of PR.
- In case the available stock in hand is sufficient and available in the warehouse, the Procurement Team shall issue a Store Requisition (SR) request to the Warehouse and Inventory Team on the system within (2) working days in order to transfer the required material to End User.
- In case the requested stock is not available / sufficient, the Procurement Team shall proceed with the requisition process.
- The Procurement Team reserves the right to reject / return any PR raised by End Users due to the following reasons:
 - PR not raised within the agreed timeframe; or
 - Incomplete or missing scope of work (BOQ, TOR or SOW) or any other requirements / information essential for the requisition.
- Rejected PR shall be sent back to the respective End Users along with the reason of rejection (missing / inaccurate / incomplete information, etc.). End Users shall rectify the PR to address the reason of rejection
- raised by the Procurement Team or obtain relevant approval in line with the DOA, for any deviation from the Annual Procurement Plan.
- Rejected PRs shall be resubmitted by End Users within the agreed timeframe

For purchases exceeding 1,500 AED and below than 10,000 AED:

- End user may directly approach the market through seeking (1) quotation from the selected vendor (single source) of purchases exceeding 1,500 AED and below than 10,000 AED. In such case, vendor shall be selected from the approved vendor master list in order to ensure dealing with a qualified vendor.
- Request for offers submitted to vendors shall be submitted in the form of RFQ along with the required details specified in point n. 19 “solicitation of offers”.
- Offer shall be received in writing and can be received through the following method:
 - Dedicated email, or
 - Procurement Portal, or
 - Any other means.
- Upon receipt of offer, end user shall submit the received offer along with the RFQ and PR form to the Procurement Team for validation after seeking the required approval from the department / business unit’s higher authority.

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- End Users are strictly prohibited to split their PRs into smaller values in order to bypass the required approvals specified in the DOA.
- The Procurement Team shall validate the PR along with the offer and its respective approval from end user.
- The Procurement Team shall always compare the PR received from End User with the approved annual procurement plan in order to ensure that no splitting of PRs has been made by end users upon requisition.
- In case of divergence, the Procurement Team shall inquire End User about the reason of splitting the PR into smaller values. If deemed inappropriate, End User shall revise the PR in line with approved annual procurement plan and resubmit it to the Procurement Team in order to proceed with the re-bidding process / revision of RFQ.
- Upon validation of the PR and received quotation, the Procurement Team shall proceed with the purchase order placement process
- Small purchases / incidental expenditures up to 10,000 AED can be paid through petty cash in line with the approved petty cash policy in the Finance manual and do not require the issuance of purchase order. **For further details, please refer to point n.4 “Purchase Order Management”.**

Scope of work:

- PRs raised by End Users shall be also accompanied with a well-defined scope of work either in the form of a terms of reference (TOR) or statement of work (SOW) or Bill of Quantities (BOQ), depending on the nature of requirement and need of End User, as follows:

a) Bill of Quantities (BOQ):

- BOQ is a formal document used by End User for **material requisition** and shall detail material quantities and specification in terms of design length, volume, weight, etc.
- End User shall ensure including all technical specifications against each line item of material requested in the BOQ document.

b) Terms of reference (TOR):

- TOR is a formal document used by End Users for service requisition and shall represent the purpose and scope of the service requested, the methods to be used, the standard against which performance is to be assessed, the resources and time allocated, and the reporting requirements needed.
- End User shall ensure drafting a comprehensive and clear TOR in order to provide vendor a clear understanding of the nature of service and assignment, level of quality and effort required by End Users, timeline and deliverables.

c) Statement of Work (SOW)

- SOW is a formal document used by End User for project requisition involving civil, mechanical, electrical, design work or any other construction project resulting in an asset for UOS.

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- End Users shall include technical requirements and specifications for projects and work assignments outlining the description and design of requirements, scope of work, quality assurance and control as well as the time schedule required accompanied with the required drawings, designs,
 - technical evaluation criteria, special conditions, warranties and other specification(s) / requirement(s) requested by End Users.
- The Procurement Team shall ensure that the BOQ / TOR / SOW part of the PR request cover, at a minimum, the following elements:

Type of Requisition	TOR / SOW / BOQ	Elements
Material Requisition	Bill of Quantities (BOQ)	<ul style="list-style-type: none"> ▪ Quantity, volume, unit price and other specification(s). ▪ Quality Standard. ▪ Possible marking requirements (if any). ▪ Packaging & Shipping Instructions. ▪ Required date or timelines
Service Requisition	Terms of Reference (TOR)	<ul style="list-style-type: none"> ▪ Objective of service. ▪ Main Outputs and deliverables. ▪ Key milestones. ▪ Reporting requirements. ▪ Training needs. ▪ Support required from UOS. ▪ Vendor's qualification and experience required. ▪ Expected start and end dates or timelines
Project / Asset Requisition	Statement of Work (SOW)	<ul style="list-style-type: none"> ▪ Project description and purpose. ▪ Location, site ownership, designs, drawings, right of way, deadline and supervision required. ▪ Experience and vendor / contractor credential. ▪ Qualification and minimum number of personnel / workers. ▪ Equipment requirement. ▪ Construction method and approach. ▪ Program of works and mobilization.

Request for Information (RFI)

- The Procurement Team might initiate the RFI process (similarly to the tendering process) during the Annual Procurement Planning process, if not already requested by End Users, under the below circumstances:
- When a material / project / service is being **procured for the first time** and there is no sufficient and detailed knowledge about vendors in UOS's vendor master file;
 - When End Users need to **develop a scope of work** for projects and services required by UOS;
 - To **compare vendors' capabilities, experience and methodologies** related to a specific service, project or goods / material requirement requested by End Users;
 - To gather preliminary information about **cost of services, projects or goods / material** and compare prices offered by vendors in relation to these requirements that have never been procured by UOS; and

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- To understand the market and looking for information or **business solutions** intended to be implemented in the future.
 - End Users or the Procurement Team may also request for an RFI, at any point of time throughout the year, in order to ensure that planning efforts, time, assumptions and budget remain valid and reasonable.
 - The RFI document shall be reviewed and approved in line with the DOA and shall always be written as a non-binding inquiry. RFI shall include, at a minimum, the following information:
 - Statement of need;
 - Background and objectives of UOS;
 - Initial requirements and scope of work;
 - Delivery date and expected milestones;
 - Request for vendors' credentials and previous experience;
 - Request for vendors' information (such as organizations structure, number of offices and location, accreditation);
 - Request for detailed breakdown of price of service / project or goods / material requested;
 - Submission requirements; and
 - Deadline for submission
 - The Procurement Team shall submit the RFI document to vendors and shall receive their responses within the required timeline. Deadline for submission shall be clearly specified in the RFI sent to vendor.
 - RFI can be directly sent to particular vendors known to UOS, depending on the type of information to be obtained and the knowledge required.
- A response to RFIs shall not be used to pre-qualify potential vendors and shall not influence the chances and success of the participating vendors in future opportunities.
- The below table depicts the main roles and responsibilities assigned to End Users and the Procurement Team while developing an RFI:

Stakeholders	Main Roles and Responsibilities
End Users	<ul style="list-style-type: none"> ▪ Developing the initial scope of work in the form of TOR / SOW / BOQ for purchase requisition. ▪ Outlining the RFI's objectives and specifications / requirements for material / service requested. ▪ Specifying the required qualification of the team, experience and credential of vendor. ▪ Suggesting potential vendors to be invited to the RFI process. ▪ Providing contact details in case of vendor's inquiries.
Procurement Team	<ul style="list-style-type: none"> ▪ Reviewing the initial scope of work in the form of TOR / SOW / BOQ and ensuring its comprehensiveness and clarity. ▪ Reviewing the list of potential vendors in coordination with End Users. ▪ Preparing the RFI document. ▪ Disseminating the RFI document to potential vendors and collecting responses.

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Total cost of Ownership

- For capital expenditure, the total cost of ownership (TCO) concept shall be considered as an important element in the evaluation of bids during the requisition process.
- TCO shall be used to determine the total economic value of an investment. It includes the cost of acquisition, operating costs of an asset tabulated over its life expectancy or for the duration of a contract / project taking all price and related cost factors into account such as running cost (including maintenance cost), cost of disposal, landed cost of asset (transportation freight, insurance and taxes, etc.)
- The Procurement team shall seek inputs about the total cost of ownership from the Logistics Team and the Finance Department during the annual procurement planning exercise and budgeting Process.

Unplanned Purchases

- End User shall discuss the unplanned procurement requirements with the Finance department in order to ensure the sufficiency / availability of the required budget.
- In case of budget availability, End User shall submit the PR to the Procurement Team after seeking the required approval by the respective authority within the end user and Finance department.
- End user shall provide business justification clarifying the need of such unplanned requirements along with the PR raised to the Procurement Team.
- The Procurement Team shall review the PR along with the business justification provided by End User and shall assess the validity of justification within the agreed timeline from the request date.
- The Procurement Team shall conduct a cost estimation for the unplanned procurement requirements raised by End User based on a pre-defined criterion previously specified in the “Sourcing and Procurement Planning” section and in line with the approved budget set by the Finance department.
- The Procurement Team reserves the right to reject / return the PR raised by end user in the following cases:
 - Incomplete or missing scope of work (BOQ, TOR or SOW) or any other requirements / information essential for the requisition process.
 - Invalid business justification(s).

Emergency Purchases

- The Procurement Team shall consider End Users’ purchase requisitions as Emergency Requests only in specific events where an immediate and serious need for the supply of goods / material / service that cannot be met through a standard procurement process.
- A PR shall be classified and considered as Emergency Purchase if it meets one or more of the following criteria:
 - Incident that poses an immediate and potential threat to life, health, property, or environment (this includes the life of UOS’ employees, local community, etc.);
 - If purchase / requirement is not the result delay or inadequate planning and the need requires an immediate response (i.e. is the result of a sudden calamity or a similar unforeseen disaster);

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- Operational equipment failure that would immediately result in a major disruption in UOS's operations; and
- To fulfill the need or requirements of UOS's external stakeholders (government bodies, strategic partners, etc.) as a result of a new regulation and legislation within the United Arab Emirates or any other requirements requested by such stakeholders
- End users shall provide a detailed justification for PR classified as Emergency Purchase, specifying the reason and level of criticality of such purchases and its impact on End User's operations and plans.
- Emergency purchases shall be categorized as per the following criteria:
 - **Immediate:** Requirements needs to be immediately procured (matter of hours or days) to fix a catastrophic / unforeseen event that totally disrupted UOS's operations in a very short period of time.
 - **Critical:** Requirements needs to be procured within a specific period of time (matter of days or week) in order to maintain UOS' operations.
 - **Urgent:** Requirements needs to be urgently procured (matter of weeks) in order to avoid future / potential stoppage or discontinuity of UOS's operations. The results of operational halt or stoppage is within UOS's risk appetite.
- End users shall communicate the budgetary requirements to the Finance department for review and approval, prior to raising the emergency purchase request to the Procurement Team.
- In case of budget approval, the Procurement Team shall review and assess the level of criticality and urgency of Emergency PRs raised by end users within 1working day.
- The Procurement Team shall also consider the business impact of such requirements and other factors that might trigger the acquisition of emergency requirement such as:
 - Changes in **demand** due to unexpected event(s);
 - Internal change within End Users' **operations** and **environment**; and
 - Introducing new **rules and regulations** in the United Arab Emirates whereby End Users needs to comply with.
- The Procurement Team reserves the right to reject any PR classified as an emergency purchase deemed to be invalid or lacks sufficient reason or justification(s).
- All emergency purchases shall be reviewed and approved within (2) working days in line with the DOA.
- The Procurement Team shall monitor and analyze the pattern of emergency purchases throughout the year.
- The Procurement Team shall submit the analysis results to the P&SC Director and Senior Management on a quarterly basis (in the first week of the quarter covering the previous quarter) for their review and consideration.
- The P&SC Director shall escalate any potential misuse of emergency purchases by End User throughout the year to UOS's Senior Management in order to take correction action(s) accordingly.

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KPIs - Purchasing Management

KPI	KPI Measure	Target KPI
Percentage of purchase requisition reviewed and approved within the required timeline	(Number of PRs reviewed and approved during the year within the required timeline/ Total number of PRs reviewed and approved during the year) *100	Not less than 90%
Percentage of emergency purchase requisition submitted by end users with no valid business justification	(Actual number of emergency PRs submitted during the year with no valid business justification / Total number of emergency PRs submitted during the year) *100	Null
Percentage of split purchase requisition submitted by end users	(Actual number of split purchase requisition / total number of purchase requisition submitted during the year) *100	Null

Sourcing Method

- The Procurement Team shall consider the most suitable sourcing method when approaching the market based on the nature, value and availability of vendors who are able to meet UOS's quality standards and requirements for the provision of goods / material / services requisition.
- Sourcing method shall be selected in line with the annual procurement plan and after consultation with the end users (where required) during the procurement planning process.
- Below are the different types of Sourcing Methods followed by the Procurement Team during the bidding process:
 - **Competitive Bidding:** Direct Solicitation of technical and commercial offers from a specific / targeted vendor
 - **Limited Tender:** Solicitation of technical and commercial offers from a limited number of vendors who are privately invited to a tender.
 - **Public Tender:** Solicitation of technical and commercial offers from an unlimited number of vendors who are publicly invited to a tender.
- The Procurement Team shall use the below sourcing method during the sourcing process based on the following criteria:

Type of Sourcing Method	Criteria
Competitive Bidding	For material / goods / services or projects exceeding or equal to 10,000 AED and less than or equal to 100,000 AED.
Limited Tender	For material / goods / services or projects exceeding 100,000 AED.
Public Tender	<ul style="list-style-type: none"> ▪ For material / goods / services or projects exceeding 100,000 AED, or ▪ For material / goods / services or projects where UOS does not maintain vendor database or sufficient vendor database for the requested requisition, or ▪ For material / goods / services or projects is being procured for the first time and there is no sufficient information and detailed knowledge about vendors and material / goods / service required.

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- The Procurement Team shall use the below type of RFX based on the following criteria and irrespective of the sourcing method followed during the requisition process:

Type of RFX	Criteria
Request for Quotation (RFQ)	For standardized material / goods / services, and where specification(s) is predefined and determined in advance by end users and when specifications of material / service are commonly available in the market.
Request for Proposal (RFP)	For non-standardized material / goods / services, and where specification(s) is tailored to fit end users' requirements or based on vendors' capabilities and solution offering. Technical and commercial consideration / aspects shall be outweighed during the evaluation process.

- The Procurement Team shall adopt the below **Sourcing Decisions (Direct Contracting)** based on a predefined criterion and depending on the type of decision taken during the sourcing process:

A) Sole Source Procurement: Contracting with OEMs, dealers, distributors, or agents, etc. who exclusively supply specific / unique material / goods within the market. Sole Source decision shall be considered under the following circumstances:

- **Exclusive right of production of materials** by original equipment manufacturers (OEMs) or vendors.
- Maintenance or repair calls by the (OEM) are required for material / goods and the manufacturer does not have multiple agents to perform these services.
- **Patented items or copyrighted materials / services**, which are only available through the patent or copyright holder.
- Material / goods required shall be identical to the equipment already in use by UOS, to ensure compatibility of equipment or it impacts the warranty.
- **Exclusive right of distribution of materials** by the approved distributors, agents, dealers, etc.
- Purchase of material / service from government-owned companies, agencies, corporations, etc.
- **Technological consideration / innovation** provided by an (OEM) or specific vendor.

Sales territories or materials availability within limited geographic boundaries.

B) Single Source Procurement: Entering into commitment with one vendor under any of the following circumstances:

- When vendor has demonstrated a **clear advantage among other existing vendors** in the market to provide material / goods / services that fully comply with End Users' requirement and standards.
- Procurement value / purchases less than 10,000 AED.
- Unforeseeable situation of **emergency (Emergency Purchases)** exists and material / goods / services cannot be obtained in time by means of standard procurement procedures and sourcing.

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Formation and Role of Procurement Committees

- UOS relies on several committees during the tendering process to further strengthen the governance and transparency while selecting and evaluating vendors' offers. The Committees shall also play an important role in promoting objectivity and ensure consistency when UOS evaluates and selects its vendors.
- Committees involved in the tendering process shall be classified as permanent committees and shall consist of the following:
 - Procurement Committee (PC), and
 - Finance Committee.
- The Procurement Committee and Finance Committee are also authorized to involve experts / third party from inside or outside UOS during the evaluation process.
- Committees' roles and responsibilities and membership shall be stipulated in the committee's charter / administrative decision and shall be reviewed and approved on an annual basis in line with the DOA.

The below table outlines the key roles and responsibilities of committees involved during the tendering process

Committee Name	Main Roles and Responsibilities
Procurement Committee	<ul style="list-style-type: none"> ▪ Ensure a smooth bidding process and oversight on the activities carried out by the Procurement Team and end users during the bidding process. ▪ Review and approve the Recommendation for Award Report developed by the Procurement Team. ▪ Oversee the negotiation process with vendors. ▪ Provide recommendations to award successful vendors. ▪ Review and approve contract made with vendors. ▪ Reviews are exempted for contract's renewal, extension, cancellation, termination, and single / sole. ▪ Review and approve change / variation order. ▪ Oversee the performance evaluation of key contracts and vendors (where required).

Selection of Vendors

When soliciting offers from vendors, the Procurement Team shall only select vendors who are registered in the approved vendor master list and are pre-qualified for the supply of goods / material / services requested by end users. However, the Procurement Team may request offers from non-registered vendors under the following conditions / exceptions

- There is no suitable vendor in the approved vendor master list who can meet end user's requirements.
- The number of suitable vendors in the approved vendor master list are below than 3 vendors, a matter which does not ensure a competitive bidding process among vendors (applies only to competitive bidding and limited tender).

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In case an offer is collected from a non-registered vendor, the Procurement Team shall conduct a pre-qualification exercise in coordination with the respective end users within UOS to ensure that the participating vendor meets UOS's quality standards and requirement (***please refer to section 4.8 "Vendor Pre-qualification and Registration process***).

- When selecting vendors from the approved vendor master list, the Procurement Team may consider the following selection approach and criteria, as deemed appropriate:
 - Assessment of specific criteria about the vendor and the offered goods / material / services, based on available information (i.e. technical capacity and experience, adherence to specific quality or certification standards, and other).
 - Previous performance evaluation of vendor (either satisfactory or exceptional).
 - Random selection.
 - Rotation.
 - A combination of the above.
- The Procurement team shall develop a list of bidders and submit it to end users for endorsement in order to allow to end users suggesting any additional vendor(s) (if any) who will be considered for the invitation to bid.
- Upon finalization of the list of bidders and obtaining the Procurement Director's approval, the Procurement Team shall submit a request for expression of interest (REOI) and submit it to potential vendors in order to seek their confirmation on their participation in the bidding process.

Confirmation from vendors shall be received by the Procurement Team within (2) working days from the request date. Deadline shall be clearly stated on the Request for Expression of Interest wherein vendors who do not submit their confirmation within the stipulated deadline shall not participate in the bid initiated by UOS.

Solicitation of offers

- All solicitation of offers submitted to vendors shall be formally documented on a standard request template depending on the RFX document and the selected sourcing method.
- The Procurement Team shall ensure including, at a minimum, the following information in the RFX template shared with vendors:
 - RFX reference number,
 - RFX title,
 - Issuance Date,
 - Background and objectives (if required),
 - Submission deadline (date / time),
 - Method and instructions of submission of offers,
 - A dedicated email address for receiving and responding to vendors' enquiries,
 - Clarification meeting details (date, time and location),
 - Deadline for the submission of enquiries,
 - List of attachments to be circulated along with the RFX,
 - Language of offers / deliverables (if any),

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- Offer validity,
- Detailed information about the requested goods / material / services / projects and the requested scope of work in line with the BOQ / TOR / SOW previously shared by end users. Depending on the nature of the request, such information shall include the following (as deemed appropriate):

Goods / material (RFQ or RFP)	Services (RFQ or RFP)	Project (RFP)
Description of goods / material and technical specifications	Description of services and applicable standards	Project description, objectives and applicable specifications and standards
Requested quantity / units	Requested terms of service/ duration	Detailed scope of works and BOQ
Target delivery date and instructions	Target start / completion date and milestones	
General procurement terms and conditions		
Special instructions and requirements for: (a) the provision of bonds and guarantees, (b) compliance with legal and regulatory standards, (c) compliance with HSE standards, (d) penalty clauses, (e) payment terms and currency, (f) insurance policies, (g) certifications and other.		
Technical and commercial criteria for the evaluation of offers (if required).		
Invitation to planned clarification meetings with the end user (where applicable).		
Bid clarification template		

- The Procurement Team shall request end users to confirm and validate the detailed information about the requested goods / material / services or projects, when required.
- Technical criteria shall be discussed in advance and agreed upon between the Procurement Team and end users prior to submitting the RFX to vendors.
- The Procurement Team shall send the RFX document to vendors within (2) working days after seeking the required approval of the P&SC Director.

For public tender, the Procurement Team shall advertise its RFX through various communication channels and media outlets (i.e. UOS's website, local magazine and newspapers, etc.). Public tendering process shall follow the standard bidding process stipulated in this manual

Revision / cancellation of RFX

- The Procurement Team reserves the right to cancel or revise the RFX in the following cases in line with the DOA:
 - Goods / material / service / project is no longer required due to force majeure, business changes or management decisions - **cancellation of RFX.**
 - In case of significant modifications to the existing RFX scope of work as a result of vendors' clarifications or request from end users - **revision of the existing RFX and re-submission of a new RFX.**
 - The lowest available offer found after negotiations exceeds the estimated budget. In such case,

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the Procurement Team shall provide all previous cost estimate and vendor's offers to the respective authority in line with the DOA who will in turn recommend the Procurement Team whether to:

- Revise the cost estimate / budget associated to the RFX and resume the evaluation / negotiation process based on the updated cost estimate and after seeking the required approval in line with the DOA.
- Proceed with the negotiation and awarding process and seek exceptional approval in line with the DOA.
- Resubmit the initial RFX document and invite new vendors to participate in the bidding process without revising the initial budget and after consultation with end users.

Purchase Requisition Revision / Cancellation

- In the event of revision and re-submission of new RFX, end users shall submit the revised PR to the Procurement Team within (3) working days from the RFX cancellation date.
- The Procurement Team shall notify participating vendors of the cancellation of the existing RFX within (3) working days from the approval date of cancellation of the RFX with a note to expect the re-submission of the new RFX, if any.
- The Procurement Team shall review the revised PR and ensure that all details are in line with the updated business requirements and changes in scope of work, quantities, unit prices, etc. (if required).
- The revised PR shall be subject to review and approval by the same level of authority defined in the DOA prior to proceeding with the RFX re-submission process.
- In case of cancellation of an existing RFX, the Procurement Team shall cancel the raised PR and cancellation shall be subject to review and approval in line with the DOA.

Management of vendors' enquiries

- The Procurement Team shall not answer enquiries received from vendors after the stipulated deadline specified in the RFX document.
- The Procurement Team shall coordinate with the respective end users to provide clarifications to vendors through a dedicated email address. Clarifications shall be provided in writing by end users to the Procurement Team within (2) working days from the clarification request date submitted by the Procurement Team.

The Procurement Team shall consolidate all the enquiries received from vendors and their related responses through a "bid clarification template" which shall be shared to all participating vendors in order to maximize vendors' understanding about UOS's requirements and service / project's scope work

- A clarification meeting shall be held with vendors during the bidding process. Such meeting may be planned or unplanned depending on the complexity of procurement and vendor's enquiries.
 - **For planned meetings:** the invitation date, time and location shall be stipulated in the RFX document shared with all suppliers during the bidding process.
 - **For Unplanned meetings:** It may be conducted under the following circumstances:

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- When there is no common or poor understanding of UOS's requirements identified through vendors' inquiries; or
- Based on direct request received from more than 2 vendors.
- The Procurement Team shall send a meeting invitation to participating vendors specifying the date, time and location of the meeting within (2) working days from receiving vendors' enquiries or meeting requests.
- Vendors shall confirm their attendance within the timeline stipulated in the meeting invitation letter. Vendor(s) who confirm their attendance and do not attend the meeting shall not be entitled to receive further clarifications after the clarification meeting.
- The following members shall attend the clarification meeting, whether planned or unplanned meeting, in order to ensure responding to all the queries raised by vendors in an adequate manner:
 - Representative from the Procurement Team; and
 - Representative from end users or project manager.
- The Procurement Team shall not provide clarifications to vendors through any other means (i.e. phone, text messages or other).

Collection of Offers

- Vendors shall submit their technical and commercial offers on or before the submission deadline and in accordance with the submission requirements stipulated in the RFX document. Offers can be received through the following method:
 - Dedicated email, or
 - Procurement Portal, or
 - Hard copies (envelopes).
- The technical and commercial offers shall be submitted at the same time. No amendments to the technical or commercial offers by vendors shall be accepted after the submission.
- During the Tendering process, a notification shall be sent to the Tender Opening Committee on the system prior to (5) working days from the receipt date, stating the date and time of the bid receipt.
- The Tender Opening Committee's Secretary or the Procurement Team (for competitive bidding) shall upload all technical and commercial offers on the system upon receipt of offers. Technical and commercial offers shall be separately uploaded on the system in order to ensure fair, objectives, and unbiased review and evaluation of offers.
- Bid package shall be reviewed by the Tender Opening Committee / Procurement Team within (3) working days in order to ensure its accuracy and completeness as per the RFX's requirements. The bid package shall include, but not limited to, the following:
 - Vendor's technical and commercial offers;
 - Bid bond (if any);
 - Non-disclosure agreement;
 - Vendor pre-qualification information / documentation; and
 - Any other required documentation.

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- The Tender Opening Committee / Procurement Team shall exclude offers from further consideration that do not meet, at a minimum, the following mandatory requirements and criteria specified in the RFX document:
 - Technical and commercial offers are not combined into one offer;
 - Offers are accompanied with the required documentation (such as valid pre-qualification documents);
 - Offers are signed and stamped;
 - Bid bond is provided as per the RFX's requirements (if required);
 - Validity period of offer conforms to the RFX's requirements; and
 - Terms and conditions, Bill of Quantities, and non-disclosure agreement are accepted.
- During the tender process, the Tender Opening Committee's secretary shall develop a Tender Opening Form and circulate it to the Committee's members for review and sign-off.
- For competitive bidding process, the Procurement Team shall develop a summary sheet upon uploading the received offers on the system and shall send the sheet to the P&SC Director for his review and approval. The summary sheet shall include, at a minimum, the following information:
 - RFX reference number;
 - Description of supply or service required;
 - Submission deadline;
 - Receipt date and time of offers;
 - List of all invited vendors during the bidding process;
 - List of all vendors who submitted their technical and commercial offers;
 - Vendor name and contact details;
 - List of additional documents provided by vendors;
 - Documents which are not provided by vendors as part of the RFX's requirements; and
 - Vendors who submitted a cancelation / excuse letter with respect to submission of offers (if any); and
 - Attachments of cancelation / excuse letters sent by vendors within the submission period (if any).

Evaluation of Offers

- All offers that have passed the preliminary examination phase shall be submitted by the Tender Opening Committee / Procurement Team to the end user for technical evaluation.
- The respective end users shall evaluate the technical offers within (3) working days during the competitive bidding process and within the agreed tender plan during the tendering process prior to submitting the evaluation results to the Procurement Team / Tender Opening Committee.
- As part of the technical evaluation process and when required, end user shall submit the technical evaluation results to the respective departments / functions which are considered subject matter experts for specific type of material / goods / service requisitions (i.e. Facility Management, Engineering department) in order to obtain their technical inputs and factor such inputs in vendors' technical offers.

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- In case of tender, a technical evaluation report shall be developed by end user and shall include, at a minimum, the following information:
 - List of technically shortlisted vendors;
 - Individual rating of qualified vendors;
 - List of disqualified vendors; and
 - Justification for excluding disqualified vendors.
- Evaluation results shall be uploaded by the Procurement Team on the system upon receipt of the technical evaluation results.
- In case of acquisition of equipment and machinery:
 - **Factory Acceptance Test**, where required, might be carried out at the vendor / manufacturer facility with the presence of a representative from the end user, Procurement and Quality Assurance team in order to ensure that that the requirements, design specification and quality standard of equipment / system are met.
 - **Site Acceptance Test** shall also be conducted at the specific places where commissioning is done with the presence of a representative from vendor, end user, Procurement and Quality Assurance team. This test shall be carried out to ensure that certain requirements such as quality and functionalities of equipment at the time of installation and commissioning are met.
- Testing results shall be incorporated and factored in the technical evaluation assessment conducted by end users.
- The table below depicts the different types of evaluation methodology based on the type of RFX adopted by the Procurement Officer during the bidding process:

Type of RFX	Evaluation Methodology
Request for Quotation (RFQ)	<p>The lowest / acceptable offer (best value) shall be considered when using RFQ and shall be determined as both:</p> <ul style="list-style-type: none"> ▪ Technically qualified offers (equal to or exceeding a passing score of 80 during the technical evaluation process); and ▪ Offering the lowest price.
Request For Proposal (RFP)	<p>The weighted scoring method shall be the formal method of evaluating vendors' offers during tenders. When using such method, the award of a contract should be made to the vendor whose having received the highest score out of a pre-determined set of weighted technical and commercial criteria.</p>

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A) When using Request For Quotation (RFQ):

Seq.	Evaluation Criteria	Weight (in percentage) – Illustrative	Grading Scale (1 to 100)	Overall Score
1	Technical criteria	10%	1 to 100	Weight x Grading Scale
2	Technical criteria	30%	1 to 100	Weight x Grading Scale
3	Technical criteria	20%	1 to 100	Weight x Grading Scale
4	Technical criteria	20%	1 to 100	Weight x Grading Scale
5	Technical criteria	20%	1 to 100	Weight x Grading Scale
Technically Qualified Offers	Offers shall be technically qualified if they notch or exceeds a passing rate of 80.			... / 100
Commercial Evaluation of the Technically Qualified Offers	Technically qualified offers with the lowest price.			Offers with the Lowest Price

A) When using Request For Proposal (RFP):

Seq.	Evaluation Criteria	Weight (in percentage) – Illustrative	Grading Scale (1 to 100)	Overall Score
Technical Evaluation (60%) - Illustrative				
1	Technical criteria	10%	1 to 100	Weight x Grading Scale
2	Technical criteria	20%	1 to 100	Weight x Grading Scale
3	Technical criteria	10%	1 to 100	Weight x Grading Scale
4	Technical criteria	15%	1 to 100	Weight x Grading Scale
5	Technical criteria	15%	1 to 100	Weight x Grading Scale
Technical evaluation score				Total Score*
Commercial Evaluation (40%) - Illustrative				
1	Financial criteria	20%	1 to 100	Weight x Grading Scale
2	Financial criteria	10%	1 to 100	Weight x Grading Scale
3	Financial criteria	10%	1 to 100	Weight x Grading Scale
Commercial evaluation score				Total Score
Final evaluation score				(Technical evaluation score x 60%) + (Commercial Evaluation Score x 40%)
Shortlisted offers				Vendor having scored the highest score

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- A pre-defined grading scale shall be utilized during the evaluation process to provide scoring against each evaluation criteria based on a specific weight defined in percentage. Below is the grading scale that shall be adopted during the evaluation process:

Rating	Scale	Descriptive statement
Unacceptable	1-20	Vendor does not address all aspects of the criterion and the information presented indicates a strong likelihood of failure to meet the end user's requirements.
Poor	20 to 40	Vendor does not address all aspects of the criterion nor is evidence presented indicating the likelihood of successfully meeting end user's requirements. Significant weaknesses are demonstrated and clearly outweigh any strength presented.
Adequate	40 to 60	Vendor addresses all aspects of the criterion and demonstrates the ability to meet the end user's performance requirements. The Application may contain significant weaknesses and / or a number of minor weaknesses.
Good	60 to 80	Vendor fully addresses all aspects of the criterion, convincingly demonstrates a likelihood of meeting end user's requirements, and demonstrates a good understating of such requirements.
Outstanding	80 to 100	Vendor fully addresses all aspects of the criterion, convincingly demonstrates its willingness to meet end user's requirements, and provide value adding service / offering to UOS.

- Once the technical evaluation is concluded, the Procurement Team shall evaluate the commercial offers submitted by the shortlisted vendors who have been technically qualified within the timeline defined in the tender plan during the tendering process and within (5) working days during the competitive bidding process and shall submit the overall evaluation results to the approving authority for review and approval in line with the DOA.
- The overall evaluation results would include the following documentation based on the type of sourcing method adopted by the Procurement Team:

Sourcing Method Selected	Type of Documentation	Approving authority
Competitive Bidding	Comparison sheet	In line with the DOA (Depending on the procurement value)
Tender exceeding 100,000 AED and below than 500,000 AED	Recommendation for Award Report	Procurement Committee
Tender exceeding 500,000 AED		Procurement Committee Finance Committee

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Negotiation of Offers

- A Negotiation Team shall be formed by the Procurement Team, where needed, consisting of a representative from end user / project manager and a representative from the Procurement Team, in order to ensure fair and transparent negotiation process.
- **For RFQ:** negotiations shall take place with vendors offering the lowest (2) commercial offers.
- **For RFP:** negotiations shall take place with vendors who have received the 1st and 2nd highest score during the evaluation process.
- The negotiations shall take place through a formal meeting or email communication, in order to ensure receiving the best price possible during the bidding process.
- Meetings' outcomes shall be documented in Minutes of Meetings and kept for audit trail purposes. An email communication shall be kept for future reference in case no formal meeting is held with vendors.
- Vendors who have been called for negotiation shall be asked to submit their revised final offers within the required timeline from the negotiation date.
- In case vendors who have been called for negotiation do not submit the revised offer within the stipulated date and time or do not attend the negotiation meeting, the initial quotation provided by vendors will be considered as a base for evaluation.
- The negotiation stage shall be concluded within the stipulated timeline from finalizing the technical evaluation process. Vendor shall be awarded based on the following criteria:
 - **For RFQ:** Vendor offering the lowest commercial offer based on the negotiation results.
 - **For RFP:** Vendor who receives the highest score of combined technical and commercial offer based on the negotiation results.
- The following elements might be also negotiated based on the offers' evaluation results:

Elements	Description
Technical aspects	Warranties, after sale service, life cycle support maintenance, agreements, and quality output issues.
Penalties	Penalties and liquidated damages.
Special terms	Type of bonds, guarantees, insurance.
Management Information	Frequency and content of reports and acceptance criteria for certain milestones.
Time frames	Duration of the contract / PO, key milestones, delivery dates, response times, etc.
Performance Incentives	Cost incentives, delivery incentives and quality incentives.
Personnel	Key team members and focal points, subcontracting arrangements (if any).

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Vendor Award

- Vendor shall be awarded the PO / contract after the evaluation and negotiation results are finalized with all vendors (if negotiation is required).
- A Letter of Award “LOA” shall be prepared by the Procurement Team within (3) working days from the finalization date of the evaluation / negotiation process and shall be subject to review and approval in line with the DOA.
- Upon approval, the Procurement Team shall submit the LOA to the successful vendor within (2) working days, acknowledging the willingness and ability to enter into a business relationship / contract with the vendor.
- The LOA should include, but not limited to, the following information:
 - Reference number of the bid,
 - Type of goods / material / service / project procured,
 - Name of the awarded vendor,
 - Total procurement / contract value, and
 - Contract’s template (same template specified in the RFX document).
- Awarded vendor shall submit the signed contract and the respective securities (i.e. performance bond) as per the template specified in the RFX document and within the timeline indicated in the LOA. Bid bond shall be returned to vendor upon the receipt of performance bond.
- Successful vendor is prohibited to commence business with UOS prior to signing the contract by their authorized personnel. This shall be explicitly stated in the LOA.
- In case the awarded vendor withdraws his response at any point of time after the evaluation process has been done or after receiving the LOA, the Bid Bond submitted by vendor shall be liquidated after seeking the required approvals in line with the DOA.
- In such case, vendor with the 2nd lowest price (for RFQ) or with 2nd highest score (for RFP) shall be awarded after a round of negotiation with vendor took place or the Procurement Team shall call for re-bidding after seeking the required approval in line with the DOA.
- The Procurement Team shall send a regret letter to unsuccessful vendors and de-brief them about their evaluation results through email after the awarding process is completed. Some of the dos and don’ts of de-briefing guidelines includes:

Dos	Don’ts
Identify the unsuccessful vendor’s significant weaknesses and deficiencies.	Compare the unsuccessful offer to other offers, including the successful offer.
Explain the general basis of the award decision.	<ul style="list-style-type: none"> ▪ Disclose the relative merits or technical standings or prices of other offers. ▪ Provide any other information related to the successful offer.

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Sole / Single Source Procurement

- End users shall submit a “Sole / Single Source” form along with the PR justifying the reason their requirements can only be procured from the selected vendor.
- The Procurement Team shall also review the business justification(s) provided by end users in order to ensure the validity and appropriateness of the Sole Single Source procurement prior to processing the purchase requisition.
- Category supervisors in coordination with end users shall continuously conduct market research within or outside UAE in order to explore new sourcing opportunities and ensure whether the adoption of the Single / Sole Source procurement for specific goods / material / service is still valid and justified.
- Respective end users shall also provide technical feedback and insights about potential vendors (i.e. OEMs) that UOS might consider dealing with in the next procurement cycle.
- The Procurement Team shall also take into consideration previous vendors’ performance history (if applicable) in order to evaluate their capability to procure end users’ requirements according to the pre-defined criteria, specifications and standards associated with such requirement.

Reporting and Monitoring of Single Source Procurement

- Business justification(s) and analysis associated with the Single Source procurement shall be reported to the P&SC Director and Senior Management on a quarterly basis (in the first week of the quarter covering the previous quarter) for their review and consideration.
- Feedback of the P&SC Director and Senior Management with respect to single source procurement shall feed into the decision of dealing with such vendors in the next procurement cycle

Other Bidding Elements

Internal validity period of offer

- The validity period of offer shall be stipulated in the RFX document shared with vendors.
- Previous offers submitted by vendors exceeding a validity period of (3) months shall not be further used by the Procurement Team during the evaluation process for any subsequent bidding.
- In case the validity period of offers has been expired, the Procurement Team shall collect new offers from vendors for comparison and evaluation.
- UOS has the right to en-cash the bid bond submitted by vendor in case the latter has withdrawn his offer within the stipulated period.

Bank Guarantees

- The Procurement team might request vendors to submit the respective bank guarantees as part of the bidding and contracting process in order to mitigate the risk of failure to adhere to the bids’ requirements or contracts’ terms and conditions by vendors.

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Auction

- An auction is the sale of goods / asset or lease of space owned by UOS to the highest bidder. Auction shall be overseen and supervised by an assigned Committee who shall approve the selection of the highest bidder. Auction can be conducted through the following methods:
 - Auction by sealed envelopes, or
 - Public auction.
- Auction might be conducted by the Procurement team in the following conditions:
 - If the estimated value of the goods / asset exceeds 50,000 AED, or
 - At the Committee's discretion.
- The best quotation provided by bidder that includes the highest price shall be selected during the auction process.
- Public auction shall be conducted under the supervision of the assigned Committee in a public session in the presence of all bidders wishing to participate and who fulfil the requirements for participation in the auction.
- The assigned Committee shall set an initial price to initiating the public auction process.
- The concerned end user in coordination with the Finance team shall determine the estimated value of the goods / asset that are subject to auction and after verifying its salvage value by the Finance team.
- The announcement of the auction shall be made in accordance with standard procedures for the tendering process.
- Auction shall be cancelled if UOS does not receive a price equivalent to or above the estimated value of the goods / assets.
- In case of rental spaces, the assigned Committee shall determine the minimum limit for the rental of such spaces prior to the rental space auction.
- The sold goods / assets shall be handed over to the awarded bidder after payment has been made by the bidder.
- If the bidder does not pay within 30 days from the award date, and without acceptable reason, UOS shall re-initiate the auction process after seeking the approval of the assigned Committee.
- In case of delay in collection of the purchased goods / assets (exceeding 30 days) by the bidder, the assigned committee at its own discretion may impose penalties / charges that shall be paid in cash by the bidder prior to handing over the goods / assets.

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KPIs - Sourcing Methods

KPI	KPI Measure	Target KPI
Compliance to submitting RFX to a minimum of 3 vendors	(Number of RFX issued to less than 3 vendors / total number of RFX issued to vendors during the year) *100	Not less than 90%
Average response rate to invitation to limited Tender	(Total number of responses received from vendors / Total number of invitations sent to vendors during the year) *100	Not less than 90%
Average time of issuance of RFX post-approval of the P&SC Director	Total number of working days of RFX issuance post approval / Total number of RFX issued during the year	Less than or equal to 2 working days
Compliance to the offers' preliminary examination timeline	(Number of offers pre-examined within (3) working days by the Tender Opening Committee / Total number of offers pre-examined during the year) *100	Not less 90%
Compliance to the technical offers' evaluation timeline (Competitive bidding)	(Number of offers evaluated within (3) working days / Total number of offers evaluated during the year) *100	Not less 90%
Compliance to the technical offers' evaluation timeline (Tender)	(Number of offers evaluated as per the tender plan / Total number of offers evaluated during the year) *100	Not less 90%
Compliance to the commercial offers' evaluation timeline (Competitive bidding)	(Number of offers evaluated as within (5) working days / Total number of offers evaluated during the year) *100	Not less 90%
Compliance to the commercial offers' evaluation timeline (Tender)	(Number of offers evaluated as per the tender plan / Total number of offers evaluated during the year) *100	Not less 90%
Compliance to awarding timeline	(Number of vendor award made within (3) working days from the approval of the evaluation / negotiation process during the year / total number of awards made during the year) *100	Not less 95%
Percentage of unsecured contracts made with vendor during the year (in value - AED)	(Value of unsecured contract made with vendor during the year / Total value of contract made during the year) *100	Less than or equal to 10%