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Planning

## **REF Expenses system**

UK Shared Business Services Ltd

UK2: Preliminary market engagement notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2025/S 000-034518

Procurement identifier (OCID): ocids-h6vhtk-05520f

Published 23 June 2025, 5:16pm

### **Scope**

### **Reference**

DDaT24329

### **Description**

The Research Excellence Framework (REF) is the exercise which runs approximately every 7 years to assess the quality of research across all UK universities. The outcomes of the exercise is a quality profile for all assessed disciplines for participating universities. This quality profile is used to calculate the distribution of approx. £2bn of research funding annually. The exercise is run by Research England on behalf of all four UK funding bodies.

All submitted research is assessed by panels recruited by the REF project (approx. 1,200 panel members take part). In addition to the assessment, a proportion of panel members are also heavily involved in the production of the policy which underpins the exercise.

Over the course of the exercise recruited panel members are paid fees and are eligible to claim expenses for costs relating to their work.

An expense management platform is required for the above mentioned reason and must/should offer the below functionality:

### Requirements

1. An easy to use user experience of uploading receipts and creating expenses of the correct value based on the receipts.
2. The solution must offer a mobile app for users to enable quick claims to be made using smartphone camera apps to upload receipts
3. The solution must offer the OCR feature to enable claim lines to be autopopulated by data contained in the receipt
4. The solution must be WCAG 2.2 compliant for accessibility
5. Supplier must hold Cyber Essentials+ and ISO127001 security certification
6. Must provide secure, encrypted storage and self-service of users' bank details
7. Must be able to store international bank details
8. Must be able to handle claims/payments in different currencies
9. Must provide SSO access with MS Entra
10. Must provide the ability to store additional details against users (for example the REF panel they work on or the role they undertake)
11. Must provide the ability for the claims to be managed in a single queue to be reviewed and approved by a team of expense claim administrators
12. Must provide the ability to configure approval workflows
13. The expenses system must interface into the UKRI corporate accounting system, Oracle Fusion
  - a. There will be the need to extract single claim total for each approved claim, including the claimant's bank details and cost code in order to be processed by Fusion
  - b. This must interface into Fusion via API or by exporting data in a format suitable compatible with the interface provided for Oracle's ADFDI template
14. Varying levels of approval for expenses must be available, enabling the REF

admin/budget holders to closely monitor and control the payments. (For example administrators are reviewing and approving individual claims but a 2nd stage approval might be sought for an overall payment run by a more senior colleague)

15. The system must have audit tracking to give visibility of the history of a claim (approved by, sent for payment etc).

16. The system must enable claim categories to be created and configured

17. The system must enable mileage claims and allow for configuration of the cost per mile

18. The system must be able to manage different claim types to be charged against different cost codes (for example one code for expenses and one for fee payments).

19. The system must offer configurable reports to be run (for example claim and payment summaries by FY/Quarter or summaries by user profiles)

20. The system should have a user interface that can be tailored (for example to have REF branding applied, hiding features that end users won't need access to to make the interface as simple as possible).

#### Usage information

? The REF programme will be recruiting 600 users in the first two years (2025-2027). The usage patterns will vary throughout those years with claims clustered when meetings occur (dates for these are not yet set). There will be 16 meetings during the first two years. It is estimated that there will be no more than 300 claims in a single month.

? The claims will include T&S claim and claims for fees due to the panel members.

? In 2028/2029 the panel membership will grow to 1,200 and the panels will attend up to 800 meetings both in-person, virtual and hybrid where expense claims will be incurred

? Preferred billing solution is a fixed annual/monthly charge for the period of the contract

At this stage we are conducting preliminary market engagement to gain further feedback from the market.

By responding you will be engaging in non-competitive dialogue which will enable UKRI to develop and assess the market's appetite, concerns, and views on formulation of its requirements. UKRI may consider the information and responses received as part of the preliminary market consultation to help inform the specification and further decision making in relation to the planning and conduct of the procurement, ensuring all valid

options are considered.

This form is an expression of interest only; the full details of the project and the desired outcomes will be provided in the Tender Notice

Procurement Plan / Dates and Budget

Project budget - £150,000 excluding VAT

Indicative advertising timescales - June 2025 - October 2025.

Indicative Contract start date - October 2025

Contract end date - March 2030.

Validation Questions

Interested suppliers please respond to these questions. Send your response to [Mobolaji.Dawodu@uksbs.co.uk](mailto:Mobolaji.Dawodu@uksbs.co.uk)

To ensure that this procurement maximises appropriate bidder responses we have the following questions that we would like to pose to interested suppliers:

1. Procurement Capacity - Based on the indicative timescales for the procurement, please can you advise if your organisation would have capacity to provide a bid response within the timescales detailed?
2. Project Interest - Based on the specification provided, please can you advise if your organisation are interested in supplying these services to the contracting authority?
3. Further Information - Based on the specification provided, please advise if there is any further information you would require, or any specification questions you would need answered in order to put a bid response forward?

Based on the project detail provided, is it your intention to respond to the Tender documentation once issued?

Yes / No

Name:

Email:

Organisation:

### **Total value (estimated)**

- £150,000 excluding VAT
- £180,000 including VAT

Above the relevant threshold

### **Contract dates (estimated)**

- 21 October 2025 to 20 March 2030
- 4 years, 5 months

### **Main procurement category**

Services

### **CPV classifications**

- 66000000 - Financial and insurance services
- 72000000 - IT services: consulting, software development, Internet and support

### **Contract locations**

- UK - United Kingdom

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## **Engagement**

## **Engagement deadline**

2 July 2025

## **Engagement process description**

Expressions of Interest (EOI)

Project Name: DDaT24329 - Workplace REF2029

Route to Market: Open Tender

Response required by: Wednesday 2nd July 2025

Response required to: [Mobolaji.Dawodu@uksbs.co.uk](mailto:Mobolaji.Dawodu@uksbs.co.uk)

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## **Participation**

### **Particular suitability**

Small and medium-sized enterprises (SME)

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## **Submission**

### **Publication date of tender notice (estimated)**

2 July 2025

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## **Contracting authority**

### **UK Shared Business Services Ltd**

- Public Procurement Organisation Number: PMPN-7535-GNTG

Polaris House, North Star Avenue

Swindon

SN2 1FF

United Kingdom

Email: [policy@uksbs.co.uk](mailto:policy@uksbs.co.uk)

Region: UKK14 - Swindon

Organisation type: Public authority - central government