

**The Carnegie Trust for the Universities of Scotland**

**Invitation to tender for provision of research services delivery of an online resource mapping Scotland’s Fair Access landscape.**

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1. Introduction

This tender specification invites interested parties to submit a proposal for delivering research services on behalf of The Carnegie Trust for the Universities of Scotland (CTUS) and The Robertson Trust in relation to a significant mapping initiative of the fair access landscape in Scotland.

The researcher/s will collate relevant information and create a digital resource for use by policy makers, funders, students and researchers.

1. **Background to the funding parties**

**CTUS** is an independent charitable foundation with the mission to secure social and economic benefits for Scotland and its people by supporting access to, and improvement of, higher education in Scotland, guided by a belief in the power and potential of education as a driver of progress, prosperity and democracy.

Since it was founded in 1901, it has supported over 70,000 individuals from low-income backgrounds to access higher education opportunities, enabling the success of generations of students. In 2026, the Trust will launch a new Strategic Plan which will put equity firmly back at the heart of its work; ensuring those who face barriers to access and achievement are given the help they need to thrive through grants, while funding research and projects that champion and drive change in the higher education system to ensure it is equipped to better support their success.

**The Robertson Trust** is one of the largest, independent funders in Scotland. Its mission is to reduce and prevent poverty and trauma in Scotland by funding, supporting and influencing solutions to drive social change. It does this by working across [four key themes](https://www.therobertsontrust.org.uk/our-themes/) which it believes are essential to achieve its mission. These are:

* Education Pathways
* Financial Security
* Nurturing Relationships
* Work Pathways

Through its Education Pathways theme, it wants to see an education system which acts as a pathway out of poverty. It supports solutions which enable those experiencing poverty and trauma to access and participate in education, developing skills, capabilities, resilience and achievements that will help them thrive. This includes improving access to post-16 education through service delivery, systems change work and delivering its own Scholarship programme.

The Robertson Trust is half-way through its 10-year strategy, through which it will provide at least £200M in funding to help people and communities in Scotland living with poverty and trauma.

1. **Further context**

In recent years, strides have been made to widen access and participation in higher education in Scotland. Various projects, grants and schemes from universities, colleges, charities and government agencies, among others, have helped to drive this progress.

With so many actors involved, however, the widening access and participation landscape has become increasingly complex. This reflects the importance of the agenda but also makes it more difficult to take a holistic view, to meaningfully measure success, or to understand what interventions are driving most significant progress.

For funders and policymakers, this creates uncertainty and fragmentation and increases the risk of ill-informed decisions and duplication.. As public, institutional and philanthropic resources face increased pressure, there is a clear need for a joined-up, targeted approach to fair access which uses data and evidence to drive real impact.

Knowing what is already happening, where and for whom, is a necessary first step to achieving this and can be delivered through the creation of a dynamic, online resource which builds on previous efforts to capture the nature and extent of widening access practice in Scotland by providing a comprehensive picture of activity across the sector.

1. **Invitation to tender**

Interested parties are invited to tender to deliver research services to CTUS and the Robertson Trust, with the primary objective of creating a digital resource which captures the extent and nature of activities and initiatives in Scotland which seek to widen access to and participation in Scotland’s universities.

The successful tenderer will report to an advisory group comprising the CEO of CTUS and sector representatives including the Robertson Trust and Scotland’s Community of Access and Participation Practitioners (SCAPP), the network of practitioners who support fair access in Scotland. Researchers will be provided with any necessary communications and development support by the CTUS Policy and Communications Manager.

* 1. **Specification for services**

In the period September 2025 to June 2026, the contractor will manage the research and delivery, with support from CTUS, of the following:

* A comprehensive resource mapping out widening access and participation initiatives across Scotland, including their target audiences and geographic reach. This should include any activity or initiative (project, programme) where the key aim is to help groups that face financial barriers to access higher education at a University in Scotland.
* Organise the information in a publicly accessible, digital-first format, which can be searched and used to understand the scope and nature of activities in different regions, by institution and for different groups/audiences.
* Identify where scheme evaluations or research have been carried out and use the resource to link evaluation reports and outcomes.
* Analyse the material gathered to provide some initial insights into the shape of the landscape and recommendations for policy and practice.
* Make recommendations for how the resource can be kept updated on an ongoing basis.
	1. **Your approach**

Interested parties are invited to review the project specification outlined in [Annex A](#annexa) and outline your approach to research delivery for this complex brief.

Your approach should consider:

* How you intend to identify and assess initiatives for inclusion in the resource including e.g. the criteria you would apply for an activity to be considered.
* The stakeholders and organisations that you think you will need to work with to develop the information for the resource.
* Your vision for making the resource accessible and interactive, including your expectations of how different user groups (learners, student advisors, institutions, , funders and policy-makers including key decision makers such as Scottish Government, Scottish Funding Council and Commissioner of Fair Access) might interact with it.
* The steps that you think will be necessary to keep the data and online resource updated over a four-five year period.
1. **Budget**

A budget of up to **£120,000 (including VAT)** is available for this work across a ten-month period. Contractors are invited to provide a breakdown of fees, including day rates and inclusive of all expenses plus VAT.

Responses to this invitation should include accurate pricing. It is emphasized that assessment of responses to this tender invitation will be on quality of service and demonstrable ability to meet the brief, rather than cost, but value for money is a selection criterion.

1. **Tender instructions**

Tenders should include the following information:

* Your understanding of the brief and your proposed research methodology (including the areas outlined in ‘your approach’ above).
* Brief example/s demonstrating your record in delivering projects of a similar scope with comparable outputs.
* Your project management approach, including a brief overview of roles, responsibilities and reporting.
* Key milestones within the contract period that you believe will be critical to delivery over the ten-month period.
* A brief high level risk assessment of the project and how you would intend to mitigate the risks and challenges encountered.
* The total fee (inclusive of VAT) for the contract period, for each element of service provided (or example, day rates of the research team), inclusive of all expenses.
* Brief CVs of the consultant/s who would deliver the service.
* Two referees/references of those who know your work.
* Your commitment to Fair Work, *if* employing staff.
* A written statement assuring CTUS that you will have business insurance and be registered with HMRC tax purposes as a small business.

Please do not hesitate to contact Sean Cameron, Policy and Communications Manager, or Dr Hannah Garrow, Chief Executive, if you require further information or would like to discuss prior to submitting a quotation.

**Email: Sean.Cameron@carnegie-trust.org or Hannah.Garrow@carnegie-trust.org**

1. **Deadline for tender submission**

Tenders (with CVs appended) should be submitted by **12 September 2025** at **17:00** by email to admin@carnegie-trust.org.

If necessary, interviews with shortlisted contractors will be held during the **week beginning** **22nd September 2025** and an initial inception meeting with the successful contractor will be arranged in **week beginning** **29th September 2025** and thereafter contactor(s) will be required to work flexibly over the time period given.

1. **Assessment of tenders**

Tenders will be assessed on the following criteria:

* Your understanding of the project’s requirements (**10%**)
* Proposed approach to delivering the research services and outputs as detailed in Annex A (**35%**)
* Knowledge and understanding of widening access and participation policy and processes, and the benefits for social mobility and economic transformation (**10%**)
* Evidence of understanding the challenges and risks associated with delivery, the brief and how you might approach these (**15%**)
* History in delivering complex research projects, collaborating with diverse stakeholders and within challenging deadlines (**10%**)
* Value for money (**10%**)
* The quality and experience of any proposed team as well as cultural fit (**5%**)
* Approach to wellbeing, equality, and diversity in the workplace (**5%**)

Overall, the assessment will be based on a quality (**70%**) and cost (**30%**) basis.

The Trust is committed to promoting equality, diversity and inclusion and to supporting environmental sustainability. Responses should also outline any organisational commitments and policies on these issues.

**Annex A**

**Specification**

**MAPPING SCOTLAND’S FAIR ACCESS LANDSCAPE**

1. **Summary**

The Carnegie Trust for the Universities of Scotland (CTUS) jointly with the Robertson Trust is commissioning a research team to carry out a mapping of the Widening Access and Participation landscape in Scotland.

This will focus on capturing the activities and programmes that are in place across HE/FE institutions, Third Sector, and Government agencies which have the objective of widening access to higher education in Scotland and improving outcomes for students from disadvantaged backgrounds.

The output will be made available to funders, practitioners, learners and other **interested members of the public** and policymakers to better understand how activities and initiatives in Scotland relate within a system. This in turn will make it easier to identify gaps (and duplication), providing a baseline for the design and development of new interventions and to enable the appraisal of the impact of an activity ceasing due to funding withdrawal. It will help to provide a starting point to evaluate, at a system level, the impact of widening access practice in Scotland, highlight good practice and deliver recommendations for improvement.

The mapping will be carried out by a researcher or team of researchers, working with practitioners, HEIs, Trusts and Foundations and other third sector partners. Desk-based research, in combination with one-to-one discussions and events or workshops will be used to bring together organisations to contribute to the project with information gathered about the scale, focus and nature of the intervention.  Depending on the format, the output should be updated regularly to ensure that it continues to reflect the live picture of activity in Scotland.

1. **Context**

The proportion of individuals from low-income or disadvantaged backgrounds who are accessing higher education at university in Scotland has increased over the last decade. However, current trends suggest that progress has slowed and that meeting the next national targets is likely to be challenging.

Although there is a wealth of activity and interventions aimed at ‘widening’ access or participation in higher education, the landscape of practice remains relatively fragmented with higher and further education institutions, government agencies, businesses and charities all involved in delivering projects and programmes nationally and locally. There is recognition of the agenda as a ‘shared endeavour’, but a lack of clear accountability for progress, and absence of a landscape perspective, risks the effective delivery of outcomes and opportunities for meaningful change.

With public and institutional funding and philanthropic funds under increasing pressure in the current fiscal environment, cuts to higher education funding could have a further detrimental impact on the fair access agenda if decisions are not made with a clear understanding the implications for those who face barriers.

To inform future priorities, Scotland’s Fair Access Commissioner has made a series of recommendations for progress including the need to strengthen research and evaluation to underpin the fair access agenda, and that decisions to cut funding for projects should be assessed for their impact on those they serve. However, the fragmented nature of the landscape, makes delivery of these and other ambitions challenging.

1. **Services Required**

The Carnegie Trust for the Universities of Scotland jointly with The Robertson Trust, wishes to commission a piece of research to inform understanding of the landscape of activity aimed at providing fair access to higher education in Scotland.

The specific objectives are to:

* Provide a comprehensive digital resource of widening access initiatives across Scotland including their target audiences and geographic reach. This should include any activity or initiative (project, programme) where the key aim is to help groups that face financial barriers to access higher education at a university in Scotland.
* Organise the information in a publicly accessible format which can be searched and used to understand the scope and nature of activities in different regions, by institution and for different groups/audiences.
* Identify where scheme evaluations or research have been carried out and use the resource to link to evaluation reports and outcomes.
* Analyse the material gathered to provide some initial insights into the shape of the landscape and recommendations for policy and practice.
* Make recommendations for how the resource can be kept up to date on an ongoing basis.
1. **Scope**

The research will focus specifically on addressing the following question(s):

* What does the fair access landscape in Scotland look like currently, in terms of initiatives, projects, programmes and their intended audiences and geographic spread?
* Are there areas of duplication or gaps that can be identified?
* How might the information/resource be used to support the improvement of research and evaluation on ‘what works’ in widening access in Scotland to inform policy and practice?
1. **Stakeholders**

The key stakeholders that we would expect the researchers to engage with as part of this study are:

* Scotland’s Universities and Colleges
* Government and government agencies with remit for Fair Access
* SFC-funded fair access projects
* Charitable Trusts and Foundations
* Membership and professional bodies
1. **Knowledge & Experience**

The successful contractor(s) will be expected to have significant experience of the design and delivery of desk-based research and the development of landscape or system mapping, with the ability to draw out insights and recommendations from the research. Knowledge of the higher education sector and fair access in Scotland would be advantageous.

1. **Required Outputs**
2. Attendance at series of project management meetings, as required.
3. A draft (and subsequently a final) report describing the research methodology and the key findings.
4. A map of the Fair Access landscape in Scotland in a publicly searchable format.

1. **Timescales**

The proposed stages of the project are described below (timescales would be subject to change depending on the proposals received):

* **Phase 1** (*September – November 2025*): Commissioning – The Trust would prepare a schedule of requirements and put the project out to tender (or identify a preferred contractor), assessing the bids received against an agreed assessment criteria framework.
* **Phase 2** (*November 2025 – April 2026*): Data Collection – The appointed research team would carry out the required research to identify and catalogue all the relevant interventions. They would need to agree qualifying criteria for any projects or programmes and a schedule of information to be gathered about each intervention.
* **Phase 3** (*April – August 2026*): Delivery – The findings would be organised into a digital resource which should be publicly accessible online, hosted by the Carnegie Trust for the Universities of Scotland.
* **Phase 4** (*Annually from August 2026*): Updating – There is provision in the plan for the resource to be kept up to date on an annual basis and to be maintained to ensure that projects and links are still valid and accessible.

Final output needs to be provided to The Trust by **5 September 2026**.  Regular review meetings are to be arranged at mutually convenient times to manage any slippage.