



Strategic Plan, 2026-31

EMBEDDING EQUITY, SUPPORTING SUCCESS

Foreword

The landscape of higher education is very different to that into which Andrew Carnegie bestowed the Carnegie Trust for the Universities of Scotland in 1901.

Rapid expansion of the sector from the 1960s and a continued drive to widen access means that Scotland now boasts one of the most highly educated populations in Europe and is home to a diverse network of esteemed universities.

While there is much to celebrate, the sector faces mounting challenges. As technological, environmental and demographic changes accelerate, the labour market and economy are being dramatically reshaped with implications for who will access higher education, the skills they will need and how they will acquire them.

The imperative for change has been recognised but diminishing public finances and outdated funding models have left institutions under increasing pressure, hindering their ability to adapt to changing societal and economic needs. In this context, the respective value of university has also come under increased scrutiny, with concerns that growing numbers of graduates are leading to falling employment outcomes and diminished returns on public investment, undermining their role as engines of productivity and social mobility.

These systemic pressures fall hardest on students from lower-income and under-represented backgrounds. Despite efforts to reduce inequalities, people from Scotland's most deprived communities are not only proportionally less likely to attend university, but when they do so, to have a positive experience, complete their studies and successfully progress in the labour market.

As Scotland wrestles with how to address these complex and interlinked challenges, there is much to do to ensure that higher education remains a vital pathway to success for capable and ambitious learners, regardless of their means or background.

This new strategy sets out how CTUS will evolve to respond to this changing landscape. Focused on growing our impact and relevance, it puts equity firmly back at the heart of the Trust's work - ensuring that those who face barriers to participation and achievement are given the help they need to thrive and championing systemic changes that will better enable their success.



What we'll do

One Vision

To be an insightful and independent body making an impactful contribution to the development of a more equitable, successful Scottish higher education system

Three Goals

- Fund individuals who face financial barriers, to participate in and secure benefits from, higher education
- Champion and drive equity of opportunity and outcome in the higher education system in Scotland
- Govern ourselves responsibly, growing our impact, relevance and reach.

Five Research Priorities

- National progress on 'Fair Access'
- Graduate outcomes in Scotland
- Widening Participation in Postgraduate Study
- Higher education futures in Scotland
- Lived experience of 'access' students



Our Plan 2026-31

How we'll do it

Fill gaps in knowledge

There's still a lot that isn't known about how to achieve equity in higher education - we'll look for evidence and data to underpin opinion and share it with those who can use it to make a difference.

Invest in futures

An undergraduate degree isn't always the ticket to success it once was - we'll fund opportunities which can improve outcomes like internships and postgraduate study

Highlight new perspectives

There's no shortage of expert opinion on higher education in Scotland - we'll shine a light on those who aren't usually heard in debates and discussions

Build a community for change

Scotland has plenty of organisations and individuals who want the best out of higher education - we'll use our resources to support and generate collective progress and action

Underpinned by our Values

Inclusive - Respecting difference and acting with compassion

Inquisitive - Evidence-driven and unafraid to ask questions

Progressive - Embracing innovation and advocating for change

How we'll know if we've made a difference

- We will have supported more individuals from low-income backgrounds to participate in higher education, complete their studies and realise their goals.
- Our grant schemes will be well-known and uniquely placed in the funding landscape and we are seen as a trusted and helpful funder by applicants, grantees and stakeholders.
- We will have raised awareness of the story of the Trust and enhanced our reputation as a knowledgeable, constructive voice in the sector.
- We will have delivered data and evidence to enhance understanding of equity outcomes and graduate success in higher education.
- We will have helped under-represented voices including those of our grantees to be heard in discussions on higher education.
- We will have increased, impactful strategic partnership activity and expanded our networks including our alumni community.

Our Roots

In establishing the Carnegie Trust for the Universities of Scotland, Andrew Carnegie wanted to reform the higher education landscape in Scotland.

Central to his vision was the belief that the benefits of university should be attainable to any person of 'modest means' who had the potential and determination to learn at that level. By paying the fees of eligible students, the Trust would **embed equity** in Scotland's prestigious, but elitist higher education sector, granting access to the universities to those who would otherwise not have had the privilege.

In addition, Carnegie tasked the Trust with the mission to improve and expand Scotland's universities, recognising their potential as powerful vehicles of economic productivity, intellectual democracy, and social mobility.

By revitalising the ancient and, at that time struggling, institutions, the Trust would better **support success**, endowing them with the resources to generate broader benefits, for the researchers and students within their communities, for Scotland and for society.

Within ten years of its foundation, CTUS was providing funding to around half of the students attending university in Scotland, enabling the accomplishments of generations of students.

By the middle of the century, it had transformed the physical and cultural landscape of higher education – funding buildings, stocking libraries and laboratories, and providing scholarships, research, travel and publication grants.

Fulfilling the vision of its founder, the Trust was instrumental in supporting the transformation of Scotland's universities into modern, sustainable institutions, laying the ground for the enhanced public interest, government investment and unprecedented expansion that came next.



Our Place in the Landscape

For over a century, motivated by a belief in the power and potential of education as a driver of progress, prosperity, cohesion and democracy, CTUS has pursued its purpose: **to secure social and economic benefits by supporting participation in higher education and the improvement of the universities of Scotland.**

We have concluded that to continue to deliver our mission for **embedding equity** and **supporting success** in Scotland's changing higher education landscape, we too must evolve. In part, we are driven by our heritage – the desire to recapture the spirit and vision that led to the Trust's foundation and which it embodied in its early years. But we are also looking ahead – ensuring that our work continues to be relevant and impactful for today, and the world that will emerge in the coming decades.

If we want to secure a more equitable and successful system of higher education in Scotland, we must create space for new ideas, voices and solutions, and ensure that reform is evidenced, democratic and transparent. To do this, Scotland needs independent and informed bodies that can ask difficult questions, drive coordinated improvement and help to mediate the diverse views on Scotland's higher education future.

And so, we are refocusing our activities, to not only continue to strive to transform individual's lives, but to be instrumental in promoting improvement within the system itself.

A refreshed grants portfolio will support talented, under-resourced students to achieve their ambitions through higher education while, a new research and insights function will deliver strategic activities and projects that provide data and evidence to support the reform and reimagining of Scotland's higher education system.

To maximise our impact, we will work in partnership with organisations and institutions who share our ambitions for a more inclusive and instrumental system; ensuring that higher education remains a pathway to success for those who have the requisite potential, talent and ambition.

To better reflect who we are today and where we are heading, we are adopting a new operating name for the Trust. Proud of our roots, officially we will remain CTUS, but we believe that as the **Carnegie Education Fund** we will more accurately embody the breadth of our mission, the nature of our ambitions and the values that guide our work.



Our Vision & Values

Our purpose is supported by a vision of what we aim to become:

An insightful and independent body making an impactful contribution to the development of a more equitable, successful Scottish higher education system and to the lives of the individuals we support.



And a set of values under which we will operate:

Inclusive

We will put equity and compassion at the heart of what we do, respecting different perspectives and supporting people from diverse backgrounds to thrive.

Inquisitive

We will be responsive to the landscape in which we operate, working flexibly to fill gaps in understanding and practice and unafraid to ask challenging questions.

Progressive

We will embrace new thinking and ideas, looking for creative ways to promote and advocate for system-level improvement.

Our Goals

1.

Fund individuals who face financial barriers, to participate in, and secure benefits from, higher education.

2.

Champion and drive equity of opportunity and outcome in the higher education system in Scotland.

3.

Govern ourselves responsibly, growing our impact, relevance and reach.



Goal 1

How we will fund futures

Since 1901, support for 'qualified and deserving', but under-resourced undergraduates was a foundation of CTUS's grant funding.

Today, the Government's ongoing commitment to keeping university places free means that most Scottish students who want to study a first undergraduate degree and can secure a place at a Scottish university will have their costs covered by the public purse.

However, for many students the journey through higher education is not linear or straightforward. We continue to play a crucial role in supporting these students – all from low-income households, many who face other complex barriers – who do not qualify for government support.

While acknowledging it is still a critical route for many, we also recognise that an undergraduate degree is not a guaranteed pathway to success for everyone. With more people than ever leaving university with a degree, competition for graduate jobs is high. Graduates who end up in low-paid, low-skill employment, despite their qualifications, can often find themselves lost to a fast-moving labour market.

There is widespread recognition that a postgraduate degree offers distinct advantages and can be a critical means of upskilling or retraining. Yet the combination of government loans which often fail to cover the full cost of tuition, coupled with a lack of grant funding, create an educational 'cliff edge' for many capable, but under-resourced graduates. This is a barrier to improving Scotland's productivity and enabling social mobility.

To address this, we will:

- Introduce a new grant scheme to support motivated students from low-income households to participate in postgraduate Master's level study to fulfil their ambitions and contribute to Scotland's future.
- Continue to deliver tuition fee support for Scottish undergraduates, working closely with SAAS and the Scottish Government to better align our funding to gaps in provision.
- Refocus our Vacation Scholarship scheme to support ordinarily resident Scottish undergraduates from low-income households.
- Explore the development of paid internship schemes to support students from low-income households to gain critical work experience opportunities.
- Consider areas where we might supplement our fee grants with bursaries or to mitigate financial pressure on the students we support.
- Look for other ways to improve our grant recipients' experience of and outcomes from higher education.



Goal 2

How we will champion change

For the last 125 years, as CTUS, we have sought to champion and contribute to the success of Scotland's universities as a vehicle for progress and social mobility.

As we have arrived at another pivotal moment in the evolution of the sector in Scotland, we still believe that higher education can offer a route out of poverty and support the development of a resilient and productive economy, but only if the system is designed and equipped to deliver these outcomes.

As a service that already sees substantial public investment, and with calls for more, who the higher education system serves and for what end are important considerations, when thinking about its future.

The government's commitment to post-school education and skills reform presents an opportunity to reflect on these fundamental questions and to build a more equitable and successful system which delivers better outcomes for individuals and society.

Policy and decision-making should always be guided by research and evaluation, but there are significant gaps in our knowledge and understanding of what the system delivers, and key voices are missing from debates about its future.

To address this, we will:

- Fund and commission research that improves understanding of barriers to access and achievement for under-resourced and underrepresented groups.
- Promote public and learner views on higher education including using innovative participative approaches such as citizen juries and panels.
- Contribute to and convene debates and discussions on the future shape of higher education in Scotland.
- Work together with stakeholders who share our interest in driving equity of opportunity and outcome in higher education to pool resources and maximise impact.
- Use outputs to promote policy changes that will enhance the equity of outcomes from higher education and improve the effectiveness of the system.



Our Areas of Research Interest

National progress on fair access.

Scotland's strategic fair access landscape and how to improve measurement and monitoring of equity in the system.

Graduate outcomes.

Higher education's contribution to **skills and employability, the future of work and Scotland's economy**, including the impact and implications of GenAI.

Equity in postgraduate study.

The current state of **participation in, and outcomes from, postgraduate study** in Scotland.

Lived experience and new voices.

Under-resourced and under-represented **students' views and experiences** of higher education participation and outcomes.

Higher education futures in Scotland.

The links between **higher education funding and equity** including innovative solutions for addressing funding challenges.



Goal 3

How we will increase impact

The initial \$10 million used to establish CTUS has, over the last 125 years, generated many more millions to support individuals and institutions.

However, where the Trust once provided nearly half of the income of Scottish universities, today our contribution pales in comparison to the billions that flow into the sector. Once radical and pioneering, CTUS's reputation, reach and influence have also diminished as the landscape around us has evolved.

The changes we are making through this strategy are intended to reverse this, carving a new place for ourselves within the higher education landscape, reconnecting with our founding vision and values, collaborating with likeminded organisations, and maximising the impact from our resources.

While we recognise that impact is a product of much more than money, with a financial crisis in the higher education sector and increasing pressure on public funding and services more generally, the role of independent foundations like ours and of philanthropy are thrown into sharper focus.

Independently, universities have driven significant growth in philanthropic income over the past decade. However, research has identified potential for a more coordinated, national approach to leveraging external, private including industry, investment into Scotland's higher education system. This will require better collaboration between funders and providers.

To address this, we will:

- Develop our communications approach to understand and connect with key audiences including existing, past and potential grantees.
- Work closely with bodies who share our ambitions to determine where we can collaborate to improve and streamline support for under-resourced learners and create lasting change.
- Explore what role we might play in expanding and promoting investment in higher education in Scotland including the potential to enhance our own income through individual giving, partnerships with industry and alumni development.
- Build our relationship with businesses and industries to generate opportunities for under-resourced students and graduates, including our grantees.
- Remain focused on the outcomes we want to see, and continuously review our progress, flexing our approach where needed.



