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Tender

## **Social Mobility Commission - Who are the long term welfare recipients and what prevents them from progressing socially and economically?**

Social Mobility Commission

UK4: Tender notice - Procurement Act 2023 - [view information about notice types](#)

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### **Scope**

### **Reference**

SMC-2526-104

### **Description**

Project Description

The Social Mobility Commission (SMC) monitors progress towards improving social mobility in the UK and promotes social mobility in England. It is an independent statutory body created by an Act of Parliament.

The SMC is interested in conducting research to understand those who are long-term welfare recipients and the factors preventing them from progressing socially and economically. Our motivation stems from wanting to understand the characteristics of long-term welfare recipients, how they utilise the welfare system and the individual and systemic factors that prevent progress.

## Background

The UK welfare system has evolved over time. Post-World War II, the 1942 Beveridge report and 1948 National Assistance Act, saw the initiation of a comprehensive, non-means-tested system of social security designed to act as a financial safety net. The system was intended to act as a 'trampoline' supporting people in times of need, before returning to self sufficiency. However, there are arguments that the current system prevents those at the lowest socioeconomic levels from moving upwards. The mechanisms for the welfare system affecting long-term dependency are influenced by a complex combination of systemic and individual factors and little is known about those who are long-term dependent and how to support them.

## Objectives

The SMC's primary objective is to answer the research question: What prevents people who are long term recipients of welfare from progressing socially and economically? To begin to answer this question, we wish to conduct quantitative research to provide an understanding of 'long term welfare recipients'. This will include:

- 1) Defining who is a long term welfare recipient. What is the prevalence and what are the core demographic and socio-economic factors that define this group?
- 2) What are the flows of people into and out of long term welfare receipt? Do people get 'stuck' on welfare?
- 3) What socio demographic characteristics and structural factors are associated with people flowing into and out of long term welfare receipt?

Through this research, SMC will gain a rich understanding of individuals who are long term welfare recipients, their characteristics, and the sociodemographic characteristics that are associated with moving into and out of dependency.

This evidence will inform a separate qualitative workstream (out of scope of this tender). Employing a systems thinking approach, the SMC will convene experts across the working and policy level for a series of workshops (e.g. incorporating work coaches, DWP officials, academics, think-tanks and charities). These sessions will map the interconnected components of the system surrounding long-term welfare use. It will build on descriptive evidence of those who are long term welfare recipients, to identify critical patterns, relationships, and feedback loops both at the individual and system level. In tandem with the quantitative research proposed in this tender, this holistic mapping will support SMC's wider aspirations to understand systemic barriers to progress and provide policy recommendations to reduce welfare dependency. (The supplier is not expected to recommend interventions or make wider policy recommendations.)

## Deliverables

Deliverable 1: The supplier will provide an analysis plan for the proposed research. This will include a robust and rigorous quantitative methodology. We anticipate the method utilising existing longitudinal data such as Understanding Society or similar.

Specifically, the analysis we would like the supplier to conduct is:

- To define those who are long term welfare recipients within the data. This will require development of a suitable definition, to be agreed with the SMC. For instance, identifying those of working age who state they have not been in employment in the last 12 months and are receiving means-tested benefits.
- Identify prevalence of long term welfare recipients and their wider characteristics. This will include descriptive analysis of core demographic and socio-economic factors.
- We also welcome proposals for inclusion of pen portraits to illustrate types of people who are long term welfare recipients. This may utilise methods such as cluster analysis or predicted probabilities to understand types of characteristics of long term welfare recipients.
- Flow analysis, utilising longitudinal data to understand the flows of people into and out of long term welfare receipt.
- Exploration of socio-demographic changes that are associated with people moving into or out of long term welfare receipt.

The supplier is expected to submit their own plan for ensuring the analysis utilises suitable data sources, is methodologically robust and has proportionate quality assurance processes. Deliverable date, April 30th 2026.

Deliverable 2: A comprehensive literature review of what is known about those who are long term welfare recipients, barriers to progress and effective strategies for improving the social mobility of this group. This will draw on both quantitative and qualitative insights from existing literature. We expect this to be circa 5,000 words and written to be accessible to SMC's audience (see Deliverable 4). Deliverable date, June 2026.

Deliverable 3: Longitudinal analysis. The supplier will be expected to undertake a rigorous, transparent longitudinal analysis in line with the agreed analysis plan. The supplier will work collaboratively with the SMC to ensure analysis meets the needs of the organisation and will be expected to share and present emerging findings. A slide deck of emerging findings should be provided to support our qualitative research workstream in June 2026.

Deliverable 4: A full report summarising methodology, findings, including all writing and drafting, and support with dissemination. We require the supplier to conduct all of the drafting of the report. However, SMC will have editorial input into the final SMC branded product to ensure the output meets internal standards and conveys the messaging of the research accurately. As such, suppliers should produce an initial draft and receive comments from SMC.

The audience for this report is expected to be a mix of policy-makers, social mobility researchers/academics/practitioners, and the public. Therefore, the outputs should reflect the diverse audience i.e. there should be an executive summary for policy-makers, findings should be written in non-technical language/plain English for the public and attention should be given to ensuring wide accessibility and easy interpretation of the information.

The final report should be complete by August 2026.

More information is available in the attached tender notice document.

Bidders must submit their Bids before 12:00 midday on 11 March 2026. All Bids must be submitted to [contact@socialmobilitycommission.gov.uk](mailto:contact@socialmobilitycommission.gov.uk). Failure to return Bids by the time and due date or in the required format may disqualify Bidders from consideration.

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

- £50,000 excluding VAT
- £60,000 including VAT

Below the relevant threshold

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

- 1 April 2026 to 30 September 2026
- Possible extension to 30 March 2027
- 11 months, 30 days

Description of possible extension:

A potential 6-month extension will be permitted, but only in negotiations with the winning supplier and only for time, not additional costs.

## **Main procurement category**

Services

## **CPV classifications**

- 79315000 - Social research services

## **Contract locations**

- UK - United Kingdom

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## **Participation**

### **This procurement is reserved for**

UK suppliers

### **Particular suitability**

- Small and medium-sized enterprises (SME)
  - Voluntary, community and social enterprises (VCSE)
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## Submission

### Enquiry deadline

2 March 2026, 12:00pm

### Tender submission deadline

11 March 2026, 12:00pm

### Submission address and any special instructions

Bidders must submit their Bids before 12:00 midday on 11 March 2026. All Bids must be submitted to [contact@socialmobilitycommission.gov.uk](mailto:contact@socialmobilitycommission.gov.uk). Failure to return Bids by the time and due date or in the required format may disqualify Bidders from consideration.

Tenderers should present their proposals in the following format:

Section 1 Summary of Proposal

Section 2 Meeting the Specification

Details of proposed approach;

- Methodology including constraints and possible solutions;
- Project management - Tenderers should indicate how they will monitor the project to ensure it is delivered in terms of quality, timeliness and cost. Tenders must include a work plan/Gantt chart that clearly shows the key activities and milestones leading up to the final report. It should mirror the detail on the budget template.
- Staffing, including short staff profiles covering examples of key relevant experience and individual/staff expertise and qualifications. Proposed distribution of duties should be clearly stated if the bid involves sub-contracting or collaboration between different providers; and
- Outputs, including how the findings will be presented.

### Section 3 Cost and Charging Arrangements

Costs should be shown separately by deliverables set out above.

For example:

- Deliverable 1: £ Insert amount
- Deliverable 2: £ Insert amount
- Deliverable 3: £ Insert amount
- Deliverable 4: Insert amount
- Total: £ Insert amount

All costs should be quoted exclusive of VAT but please indicate if the project will attract VAT. If your proposal includes costs for sub-contractors these costs must be shown inclusive of any VAT element (e.g. sub-contractor's costs to you are £10K plus VAT, your proposal should show subcontractors costs as £12K inclusive of VAT @ 20%).

The department will also conduct its own due diligence checks in relation to the bidder's financial viability and may request additional financial information to be provided as part of this process. Whilst the department will attempt to mitigate any financial risks it may, at its own discretion, reject a bid where it assesses the financial risk to be too great to proceed with the award of the contract.

### Section 4 Risk Management

- Outline, in no more than one-page, the key risks to delivering the project and what contingencies will be put in place to deal with them.
- A risk is any factor that may delay, disrupt or prevent the full achievement of a project objective. All risks should be identified.
- For each risk, the one-page summary should assess its likelihood (high, medium or low) and specify its possible impact on the project objectives (again rated high, medium or low). The assessment should also identify appropriate actions that would reduce or eliminate each risk or its impact.
- Typical areas of risk for a research project might include staffing, resource constraints, technical constraints, data access, timing, management and operational issues, but this is not an exhaustive list.

## Section 5 Data Security

- Provide a plan that explains how departmental and/or personal data will be protected.
- Provide a copy of your Cyber Essentials Qualification.

## Section 6 References

For the references, the SMC requires relevant examples of similar projects you have completed and how they are similar to this tender.

Sections 1 - 4 should not exceed 10 sides of A4 and sections 5 -6 should not exceed 3 sides of A4, for a combined total of 13 sides. Any bids above that will not be considered. The font size should not be smaller than 10pt. Embedded links will not be considered, nor will Annexes that exceed the 13 page count.

## **Tenders may be submitted electronically**

No

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## **Award criteria**

Name	Description	Type	Weighting
Financial scoring	<p>Financial scoring represents 20% of the overall evaluation. The bidder with the lowest overall price will receive 20 marks, and all other bids will be marked as a proportional variance from the top-scoring bid. The formula being used for Relative Assessment for this procurement is: Bid Score = (Lowest Price/bid price) x 20            E.g. a bid that is 10% more expensive will receive 18 marks; one that is twice the price will receive 10 marks.</p>	Cost	20%
Does the proposal describe a robust method / suitable approach?	<p>- Demonstrates a clear understanding of the objectives and approaches outlined - Creative and constructive thinking is demonstrated by the proposed approach to this project in meeting the objectives - The suitability of the proposed approach to deliver against requirements, and identification of any opportunities to add value to this - Clear articulation of methods used to garner particular findings, with reference to datasets and analytical techniques used.</p>	Quality	20%

Name	Description	Type	Weighting
Team and organisational experience in conducting similar work	<ul style="list-style-type: none"> <li>- Demonstrate experience of the team doing relevant work - Evidence of experience in the challenges and considerations involved in this work - How the skills and expertise of the team will be used and managed to best effect (where there is a partnership Please include specifics about how this will be managed, add value and any experience of successful collaboration. - Specifics about the methodology and quality assurance process</li> </ul>	Quality	20%
Presentation	<ul style="list-style-type: none"> <li>- Clear articulation of plans for presenting work in a clear way - Evidence of ability to deliver high-quality research, fieldwork and outputs - Ability to present findings clearly in both writing and visual formats (e.g. PowerPoints tailored to a range of audiences - policy makers, analysts, commissioners, wider secretariat &amp; public)</li> </ul>	Quality	16%

<b>Name</b>	<b>Description</b>	<b>Type</b>	<b>Weighting</b>
Project management	- Clear plan for communication and demonstration of a collaborative approach to taking the work forward, working closely with SMC as appropriate. - Evidence of organisational capacity, project management and quality assurance procedures, to deliver the project in the specified timescales and quality - The quality, timing and suitability of proposed outputs	Quality	16%
Risks and mitigations and data protection	- That the risks and challenges are considered, and mitigation is integrated into the proposed methodology - Consideration of security, confidentiality and data protection	Quality	8%

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## **Procedure**

### **Procedure type**

Below threshold - open competition

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## Documents

### Associated tender documents

[2026-01-11 SMC Below Threshold Tender Notice - WELFARE.docx.pdf](#)

Please review this document for additional information around the tender notice.

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## Contracting authority

### Social Mobility Commission

- Public Procurement Organisation Number: PDLB-8544-PLQT

1 Horse Guards Road

London

SW1A 2HQ

United Kingdom

Email: [contact@socialmobilitycommission.gov.uk](mailto:contact@socialmobilitycommission.gov.uk)

Region: UKI32 - Westminster

Organisation type: Public authority - central government