

RCloud Tasking Form – Part B: Statement of Requirement (SoR)

Title of Requirement	Integrated Multi-Channel Influence Methods
Requisition No.	1000166781
SoR Version	0.1
Duration	T0+8Months
Budget	Redacted under FOIA Section 43 – Commercial Interest

1.	Statement of Requirements
1.1	Summary and Background Information
	<p>Summary</p> <p>UK Defence has a requirement to understand how influence campaigns aimed at overseas audiences can be designed using all available communications channels and establish a synergy between online and offline channels in order to maximum audience reach and impact. Specifically this research aims to:</p> <ol style="list-style-type: none">1. Identify strategies and evaluate that Defence can implement to most effectively design multi-channel influence campaigns aimed at overseas audiences comprising of both online and offline forms of communication.2. Identify and develop robust measures of effect for both online and offline channels. <p>Background</p> <p>“We live in a data-rich information age in which the combined power of exponential growth in computer capability, data, and digital connectivity is fundamentally shaping almost every facet of modern life. Those who could adapt have thrived, others have clung to old methods and withered. Information, in all its manifestations, must change the way Defence execute business and prosecute warfare, both at home and overseas in an era of constant competition. Defence must harness this digital horsepower or be left behind; we have reached the tipping point. Information is no longer just an enabler, it is a fully-fledged national lever of power, a critical enabler to understanding, decision-making and tempo, and a ‘weapon’ to be used from strategic to tactical level for advantage.</p> <p>The smart use of information through the mass customisation of messaging, narrative and persuasion, can vastly extend reach and deliver disproportionate influence on targeted audiences. It is underpinned by core digital technologies and digitally savvy people. This digital race – human and machine – is increasingly geopolitical in nature. Currently we are being challenged in a ‘grey-zone’ short of armed conflict by agile state and non-state actors – notably Russia – who</p>

understand our vulnerabilities and seek to exploit them through multifarious asymmetric approaches and the flouting of rules-based norms.

Central to these strategic contests are 'information battles'; battles in which information is 'weaponised' and ones in which we increasingly lack the initiative. To regain the initiative and achieve information advantage we must rapidly up our digital game, fundamentally shift the way we think, act, invest, and move with pace through the incremental development of new capabilities. Defence, as part of a national and allied effort, must become a potent and resilient strategic actor; postured for constant competition both home and away. This requires a cultural transformation and a conceptual foundation that puts information advantage at the heart of 21st Century deterrence and campaign design. Information advantage must become part of our doctrinal lexicon and joint action practice; a bedrock upon which a range of physical, virtual and cognitive effects will be built, including the use of information as an effecter in its own right."

Air Marshal E J Stringer CB CBE Director General Joint Force Development and Defence Academy - **Joint Concept Note 2/18 Information Advantage**

<https://www.gov.uk/government/publications/information-advantage-jcn-218>

In order to inform the development of some of the capabilities required to deliver Information Advantage, this research aims to identify and evaluate approaches currently used to (a) design campaigns that utilise multi-channel approaches using both online and offline channels, and (b) accurately measure the effectiveness of such multi-channel campaigns in delivering their objectives.

One of the most vital components in creating a successful and wide-reaching influence campaign is to make sure as many of the Target Audience (TA) are exposed to your content as possible. Due to the accelerating rate of technological progression, the focal concern for dispersing influential material typically resides in the online domain. This is a logical priority considering an increasing number of people are gaining access to the internet, and using it with greater frequency. At the same time however, it is important to remember that a significant proportion of the world population do not use the internet – and particularly in many audiences of potential interest to Defence. In addition to this, there are numerous populations of the world who, while do have internet access, are heavily censored and restricted by their local governments. By prioritising efforts into online means of influence, the ability to exert influence - particularly across different countries and region of world - is greatly restricted. This would suggest, in order to maximise the success of an influence campaign, a synergy should be constructed incorporating both online and offline means of message dispersal.

Enhancing the reach of a campaign is not the only advantage of utilising a multi-channel approach. Research has demonstrated that the greater the variety of vessels used to spread a message, the higher the likelihood of being exposed to the same message in different formats. This diversity of exposure reinforces the sentiment of the message by increasing cognitive processing and perceived credibility thus improving influence. This is supported by a breadth of literature finding that the more frequently a message is viewed by its audience, the greater the chances the message will 'sink in'. This would suggest the effective use of both online and offline methods of content dispersal can

both increase the audience of a message and enhance the persuasiveness of the message content at the same time.

Many are aware, particularly those in the advertisement industry, of how advantageous it is to repeat a message as often as possible. While, to an extent, it can help the message 'sink in', this approach does have its limits and can even backfire. When a message is repeated too often, further exposure has either no effect, or a negative one - such as the message being ignored. This phenomenon is referred to as the 'wear out effect'. Research in the area of maximising the effectiveness of messaging campaigns advocates using a variety of communication formats, to reduce the effect of this 'message fatigue'. This favours the approach of creating a synergy of offline and online means of message dispersal. By utilising numerous methods, the advantages of repeating a message frequently can be realised, while the diversity of format will mitigate against the message fatigue associated with over-reliance on a singular avenue of communication.

The ability to measure the performance (MoP) of influence messaging online is made a simple task with applications such as Twitter API and Hootsuite. However, these vanity metrics are limited in what they can tell us and often the meta-data is black boxed by the application, curbing the ability to further investigate the data. This is less easy to do when it comes to offline messaging, there is no guarantee that the TA has seen the message or interacted with it, although traditional market and advertising research methods have proven an efficient way of dealing with this. The ability to measure the performance of the influence messaging both online and offline is key to understanding how well your messaging is being disseminated across channels, thus methods of doing this are key to better understating performance. For the purposes of this work, Measure of Performance (MoP) is defined as: How well the message has been circulated, whether people have interacted the message, its virality.

Measuring effect (MoE) however, is significantly more difficult. Essentially, it is looking at whether the influence attempt has had the desired effect on the TA.

For the purposes of this work, Measures of Effect (MoE) is defined as: evidence showing whether the campaign or message had an effect – either to inform, influence of change behaviour - this can be intentional or non-intentional and on the desired TA or other populous.

Whilst there is some evidence to suggest that audiences that engage with online content are potentially more likely to be influenced by the content and change their attitudes/behaviours accordingly, numerous research studies have identified that measurement of the effectiveness of information and influence campaigns and messaging is an issue.

Indeed wide ranging reviews of digital communications campaigns, in particular, across both the political, state and non-state spheres, has shown that robust evidence of their effectiveness in terms of delivering objectives and the assessment of the impact of specific approaches applied within campaigns is weak.

	<p>Added to this, research also highlights the issues with detecting online behaviour¹ and how it is not always an accurate representation of true sentiment or offline behaviour.</p> <p>Given this and the added complexity of measuring effectiveness of across both online and offline channel in multi-channel campaigns poses a significant problem, and is one this research will attempt to address.</p>
1.2	<p>Requirement</p>
	<p>Research Focus</p> <p>The overarching requirement of the research is to:</p> <ul style="list-style-type: none"> • Identify strategies that Defence can implement to most effectively design multi-channel influence campaigns aimed at overseas audiences comprising of both online and offline forms of communication. • Identifying and developing robust measures of effect for both online and offline channels and to establish evidence-based theories of correlation or causation between engagement and influence. <p>The research will need to consider how multi-channel approaches and measurement of effect may vary between regions and countries across the globe and develop guidance and a supporting framework that will aid information activity practitioners in the design and delivery and evaluation of a range of information operations effects aimed at a range of diverse overseas audiences.</p> <p>We realise this is broad and complex requirement to address so in order to provide some context Annex A provides a high level overview of Defence Information Activities requirements at the Strategic, Operational and Tactical levels, and provides an analysis of regions / countries of interest taken from the Integrated Review of Security, Defence Development and Foreign Policy.</p> <p>The Annex also contains a list of information and influence Effects UK Defence may wish to achieve. In order to aid in the design of information operations to achieve these Effects,</p> <p>The research will need to consider how these approaches may be vary depending on the specific context within which the communications activities are to be conducted. Dstl has identified a number of potentially important contextual factors which are listed below:</p> <ul style="list-style-type: none"> • Whether the objective of the communication is to inform or influence or change behaviour and the specific information campaign influence objectives e.g. whether it is to Reassure or Deter or Convince etc. (see Annex A for full list of campaign effects). • The level of attribution of the communications e.g. whether communications are delivered directly or obviously by UK Government / Defence or via third parties where attribution is not immediately obvious

¹ Defined as the functional and interpersonal behaviours of people whilst online. This includes behaviours such as social networking, self-representation, pro and anti-social behaviours (e.g. disinhibition & cyberbullying).

- The **audiences' attitude** to the UK and UK Defence i.e. whether the audience is hostile, neutral, or friendly
- **Time scales for communications** – enduring long term campaigns down to very short term in reaction to specific events.
- The level of **audience interest in the topic** and particularly how to persuade disinterested audiences or audiences not interested in the subject or topic
- **Uninformed audiences** i.e. audiences that know little about the organisation attempting to persuade them e.g. if communications are around Redacted under FOIA Section 26 – Defence how can you persuade audiences that have little or no real understanding of what Redacted under FOIA Section 26 – Defence is or does?
- The **specific target audience** we are trying to persuade e.g. whether it is a national population as whole versus a specific population segment or demographic group, or a smaller group versus an individual etc.

These factors will be critically reviewed by the contractor, and the contractor may suggest other or additional important contextually factors.

We realise consideration of all the above factors (particularly when considering combinations of factors) could add significantly to the complexity of the task. However, we wish the outputs to be as context specific as possible, within the limitations of feasibility and budget.

Methodology

Analysis of Published Sources

- The Contractor shall conduct a literature review of all relevant published research.
- The review shall include as a minimum:
 - Academic publications;
 - Research industry published research e.g. from market research companies;
 - Industry published research;
 - Other published research, for example from Think Tanks etc.

Development of Case Studies

- In order to illustrate how Defence may be able to develop online/offline synergetic campaigns and determine how MoE and MoP was or could have been conducted.

Interviews with SME's

- This research, as a minimum, will be undertaken via in-depth, semi-structured interviews or workshops. The Contractor will be responsible for obtaining Informed Consent from all interviewees. All personal data specifically obtained in support of this requirement will be retained in accordance with the Data Protection Act (DPA18) implementing the General Data Protection Regulation (GDPR).

	<ul style="list-style-type: none"> • The analysis of published sources shall help identify SMEs within the academic, commercial and research industries as well as other government departments. The contractor shall engage with the SMEs to identify individuals who are willing to be subject to an in-depth interview or participate in a workshop in order to provide further insight into how defence can develop influence campaigns which utilise a mixture of online and offline communication styles. • The bulk of these interviewees will be identified as part of the analysis of published sources; however, if contractors can identify any SMEs they would like to interview at this stage, then they should include details in their proposal. • The final list of interviewees will be subject to agreement between Dstl and the Contractor. <p>The contractor should not be limited to the mandatory requirements outline above and is free to propose additional research stands for example the contractor may suggest additional primary research, such as quantitative data collection or qualitative approaches, as part of their proposed approach or real world testing of different options for building engagement and maximising influence.</p> <p><u>Guidance and supporting framework</u></p> <p>A key output is the development of a framework(s) and supporting guidance aimed at both those new to information operations and current practitioners. User guidance must therefore provide clear and non-technical (as far as possible) guidance on how to design and evaluate campaigns and messaging in different settings and for different effects (as outlined above).</p> <p>The framework should follow a step-by-step process that considers a range of factors in the design and implementation of influence activities and be illustrated with simple examples to aid with such design.</p> <p>The guidance and framework should be provided in MS Word, MS Power Point or PDF format, and may also be supplemented by a simple searchable Excel database that can be used by practitioners in real-time information operations.</p> <p><u>Two-page summaries</u></p> <p>Two-page non-technical summaries will also be produced. The summaries will outline design and evaluation approaches, and be illustrated with relevant case studies where possible.</p>
1.3	Options or follow on work <i>(if none, write 'Not applicable')</i>
	Not applicable
1.4	Contract Management Activities
	N/A

1.5	Health & Safety, Environmental, Social, Ethical, Regulatory or Legislative aspects of the requirement
	N/A

1.6	Deliverables & Intellectual Property Rights (IPR)					
Ref.	Title	Due by	Format	Expected classification (subject to change)	What information is required in the deliverable	IPR Condition
1	Start-up Meeting Presentation	Presentation 2 working days prior to meeting Meeting within 2 weeks of contract award (CA).	MS PowerPoint	Redacted under FOIA Section 26 – Defence	Presentation pack to include but not limited to: <ul style="list-style-type: none"> • Proposed activity, resourcing and timelines. • Review of risk management plan. • Review of intended deliverables and deadlines. 	DEFCON 705 Wish to circulate across Govt. Suggest we clarify “Authority” is UK Govt. not just MoD
3	Technical Report	T+7 Months	MS Word	Redacted under FOIA Section 26 – Defence	A full technical report. To include, though not limited to: <ul style="list-style-type: none"> a. Introduction and background to the research b. The overview of methodology used c. Findings from the research 	As above

					<p>d. Case studies</p> <p>e. A standalone Executive Summary</p> <p>f. Conclusions and recommendations, where appropriate, for further research and development within this area.</p> <p>Key messages will be highlighted in bordered boxes where appropriate throughout the report.</p>	
4	Framework and guidance	T+7 Months	MS Word / MS Power Point, Excel	Redacted under FOIA Section 26 – Defence	As specified within Requirement	As above
5	Two-page summaries	T+7 Months	To be confirmed	Redacted under FOIA Section 26 – Defence	As specified within Requirement	As above
6	Customer Presentation /& Closure Meeting	Presentation 5 working days prior to meeting.	MS PowerPoint	Redacted under FOIA	<p>To include, though not limited to:</p> <p>a. Introduction and background to the research</p>	As above

		Meeting held by T+8 months		Section 26 – Defence	<ul style="list-style-type: none">b. The overview of methodology usedc. High level findings from the researchd. Overview of case studiese. A standalone Executive Summaryf. Conclusions and recommendations, where appropriate, for further research and development within this area. Demonstration of the framework/guide	
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1.7	Deliverable Acceptance Criteria
	<p>All Reports included as Deliverables under the Contract e.g. Progress and/or Final Reports etc. must comply with the Defence Research Reports Specification (DRRS) which defines the requirements for the presentation, format and production of scientific and technical reports prepared for MoD.</p> <p>Final Reports: shall describe the entire work performed under the Contract in sufficient detail to explain comprehensively the work undertaken and results achieved including all relevant technical details of any hardware, software, process or system developed there under. The technical detail shall be sufficient to permit independent reproduction of any such process or system.</p> <p>All Reports shall be free from spelling and grammatical errors and shall be set out in accordance with the Statement Of Requirement above. All deliverables shall be delivered by the deadlines set out above.</p> <p>Failure to comply with the above may result in the Authority rejecting the deliverables and requesting re-work before final acceptance.</p>

2	Evaluation Criteria																																						
2 . 1	Method Explanation																																						
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2 . 2	Technical Evaluation Criteria																																						
	<u>Scoring and Weighting</u>																																						
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Technical Scoring Guide - Definition of Terms:

Word or phase	Meaning
Comprehensive	Including or dealing with all or nearly all elements or aspects
Close to comprehensive	Including or dealing with slightly less elements or aspects than comprehensive
Satisfactory	Acceptable
Limited	Missing some minor / important elements
Inadequate	Missing some major / important elements

T1. The proposal clearly demonstrates that the Contractor understands the requirement.

Score	Key Indicators
5 = Exceeds	<ul style="list-style-type: none"> Demonstrates a comprehensive understanding of the Authority's requirements and objectives, – illustrating knowledge that goes significantly beyond that presented in this Statement of Requirement; Provides excellent insights into how the context and associated requirements may evolve - going well beyond the material presented in the statement of requirement.
4 = Fully meets	<ul style="list-style-type: none"> Demonstrates a close to comprehensive understanding of the Authority's requirements – illustrating knowledge that goes beyond that presented in this Statement of Requirement; Provide good insights into how the context and associated requirements may evolve - going beyond the material presented in the statement of requirement.
3 = Adequately meets	<ul style="list-style-type: none"> Demonstrates an understanding of the Authority's requirements; Provide some insights into how the context and associated requirements may evolve - going beyond the material presented in this statement of requirement.
2 = Fails to meet in a minor respect	<ul style="list-style-type: none"> Has shortfalls in demonstrating an understanding of the question area / requirement – for example, simply mirroring the information presented in this Statement of Requirement; Offers little insight into how the context and associated requirements may evolve.
1 = Fails to meet in a major respect	<ul style="list-style-type: none"> Fails to demonstrate understanding of the question area / requirement; Offers no insights into how the context and associated requirements may evolve.

T2. The proposal provides details of key risks, dependencies, assumptions and any relevant ethical issues.

Score	Key Indicators
5 = Exceeds	<ul style="list-style-type: none"> Provides a comprehensive overview of key risks, dependencies, assumptions.
4 = Fully meets	<ul style="list-style-type: none"> Provides a close to comprehensive overview of key risks, dependencies, assumptions.
3 = Adequately meets	<ul style="list-style-type: none"> Provides a satisfactory overview of key risks, dependencies, assumptions.
2 = Fails to meet in a minor respect	<ul style="list-style-type: none"> Provides a limited overview of key risks, dependencies, assumptions.
1 = Fails to meet in a major respect	<ul style="list-style-type: none"> Provides an inadequate overview of key risks, dependencies, assumptions.

T3. The proposal clearly demonstrates that the Contractor has the expertise and knowledge to successfully deliver the requirement.

Score	Key Indicators
5 = Exceeds	<ul style="list-style-type: none"> Demonstrates comprehensive expertise of relevance to the requirement.

4 = Fully meets	<ul style="list-style-type: none"> Demonstrates close to comprehensive expertise of relevance to the requirement.
3 = Adequately meets	<ul style="list-style-type: none"> Demonstrates satisfactory expertise of relevance to the requirement.
2 = Fails to meet in a minor respect	<ul style="list-style-type: none"> Demonstrates limited expertise of relevance to the requirement.
1 = Fails to meet in a major respect	<ul style="list-style-type: none"> Demonstrates inadequate expertise of relevance to the requirement.
T4. The proposal clearly demonstrates that the personnel the Contractor has nominated to work on the requirement have the relevant experience to successfully deliver it.	
Score	Key Indicators
5 = Exceeds	<ul style="list-style-type: none"> Demonstrates that the project team has comprehensive expertise and relevant experience to successfully deliver this requirement.
4 = Fully meets	<ul style="list-style-type: none"> Demonstrates that the project team has close to comprehensive expertise and relevant experience to successfully deliver this requirement.
3 = Adequately meets	<ul style="list-style-type: none"> Demonstrates that the project team has satisfactory expertise and relevant experience to successfully deliver this requirement.
2 = Fails to meet in a minor respect	<ul style="list-style-type: none"> Demonstrates that the project team has limited expertise and relevant experience to successfully deliver this requirement.
1 = Fails to meet in a major respect	<ul style="list-style-type: none"> Demonstrates that the project team has inadequate expertise and relevant experience to successfully deliver this requirement.
T5. The proposal clearly demonstrates that the Contractors proposed approach will fully address the key research questions / mandatory requirements stated in the RCA. Proposal should include the following: a detailed work breakdown structure, schedule, roles and responsibilities.	
Score	Key Indicators
5 = Exceeds	<ul style="list-style-type: none"> Provides a comprehensively detailed technical approach, illustrating how it may evolve during the life of the contract; Comprehensively addresses all of the key research questions / mandatory requirements; Provides significant additional relevant information and clear insights; Provides strong examples and reasoning to back up any arguments presented, including reference sources; Demonstrates excellent awareness of key challenges and provides significant detail on how they may be addressed.
4 = Fully meets	<ul style="list-style-type: none"> Provides a comprehensively detailed technical approach; Comprehensively addresses all of the key research questions / mandatory requirements; Provides some additional relevant information or insights; Provides some examples and reasoning to back up any arguments presented, including reference sources; Demonstrates good awareness of key challenges and how they may be addressed.
3 = Adequately meets	<ul style="list-style-type: none"> Provides a satisfactorily detailed technical approach; Satisfactorily addresses all of the key research questions / mandatory requirements; Provides little additional relevant information or insights; Provides few examples and reasoning to back up any arguments presented, including reference sources; Demonstrates awareness of some of the key challenges and how they may be addressed.
2 = Fails to meet in a minor respect	<ul style="list-style-type: none"> Provides limited detail in the technical approach; Limited consideration of the key research questions / mandatory requirements; Provides no additional relevant information or insights; Provides insufficient examples, and/ or little reasoning, to back up any arguments presented;

		<ul style="list-style-type: none">• Demonstrates only limited awareness of key challenges and how these may be addressed.
	1 = Fails to meet in a major respect	<ul style="list-style-type: none">• Provides an inadequately detailed technical approach;• Inadequate consideration of the key research questions / mandatory requirements;• Provides no additional relevant information or insights;• Provides no examples or reasoning, to back up any arguments presented;• Demonstrate no awareness of key challenges and how these may be addressed.

2.3	Commercial Evaluation Criteria																								
	<p>Evaluation of Commercial bids will be undertaken against responses to the sub-criteria detailed below and scored in accordance with the ‘Commercial Scoring Definitions’ underneath.</p> <p>The Authority reserves the right to reject any Tender if a supplier scores a ‘Fail’ in any of the criteria below:</p>																								
	<table><tr><th>Ref</th><th>Sub-Criteria Description</th><th>Scoring Range</th><th>Sub-Criteria Weighting</th><th>Maximum Weighted Score</th></tr><tr><td>C1</td><td><p>Please submit your full firm price breakdown for all costs to be incurred, including:</p><ul style="list-style-type: none">• What rates are being used for what Grade• Quantity of manpower hours per Grade• Travel & Subsistence costs• Journal publication fees• Any Materials costs• Any Facility costs• Any sub-contractor costs• Any other costs</td><td>Pass/Fail</td><td>n/a</td><td>Pass/Fail</td></tr><tr><td>C2</td><td>Compliance with the Task specific terms and conditions as stated within the Statement of Requirement and Tasking Form.</td><td>Pass/Fail</td><td>n/a</td><td>Pass/Fail</td></tr><tr><td></td><td colspan="3">Subtotal Available Weighted Mark</td><td>Pass/Fail</td></tr></table>					Ref	Sub-Criteria Description	Scoring Range	Sub-Criteria Weighting	Maximum Weighted Score	C1	<p>Please submit your full firm price breakdown for all costs to be incurred, including:</p> <ul style="list-style-type: none">• What rates are being used for what Grade• Quantity of manpower hours per Grade• Travel & Subsistence costs• Journal publication fees• Any Materials costs• Any Facility costs• Any sub-contractor costs• Any other costs	Pass/Fail	n/a	Pass/Fail	C2	Compliance with the Task specific terms and conditions as stated within the Statement of Requirement and Tasking Form.	Pass/Fail	n/a	Pass/Fail		Subtotal Available Weighted Mark			Pass/Fail
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