

Statement of Requirement (SoR)

Purpose

This document is for new Extra-Mural (EMR) Contracts. Use the [Request for Contract Action \(RCA\) Guidance for EMR](#) page on WikiD when filling out this SoR and a supporting RCA. Please seek assistance if desired from [Commercial](#) or your Divisional Procurement Representative.

This document is Contractor facing and the RCA is an internal document. Please delete non-essential grey text before issuing externally/ to Contractors.

Reference Number	1000167132
Version Number	1.0
Date	09/08/2021

1.	Requirement
1.1	Title
	HS 1.049 Understanding Overseas Audiences
1.2	Summary
	<p>Information is being used like never before. United Kingdom (UK) Defence Doctrine now recognises information as an instrument of national power. To achieve information advantage, Ministry of Defence (MOD) needs to adopt an audience-centric approach to overseas operations. Defence understands that knowing overseas audiences is important in ensuring the information provided to them is at the appropriate level.</p> <p>This project will conduct foundational research that can be used in Defence contexts to apply audience analysis (AA) and Information Environment Assessment (IEA). Its goal is to increase understanding of what factors shape the identities, motivations and behaviours of overseas audiences (hostile, neutral and friendly), including the role of perceptions, beliefs, values. This research supports the following work strand:</p>

	<p>1. Concepts, methods, tools and technologies for overseas AA and IEA and their application</p> <p>The successful supplier would be required to:</p> <ul style="list-style-type: none"> Identify and describe methods that can be employed to generate enhanced understanding of overseas audiences and improve Defence’s ability to conduct AA and IEA, also considering concepts, tools and techniques.
<p>1.3</p>	<p>Background</p>
	<p>Recent Defence policy documents have emphasised the centrality of information and audiences. They include: Joint Concept Note (JCN) 2/18: Information advantage, The Integrated Operating Concept 2025, Multi-Domain Integration (JCN 1/20), Orchestration of Military Strategic Effects Guide (2020) and Global Britain in a Competitive Age: the Integrated Review of Security, Defence Development and Foreign Policy (2021).</p> <p>AA can be defined as “the systematic study of people to enhance understanding and identify accessibility, vulnerability, and susceptibility to behavioural and attitudinal influence”¹ a multi-disciplinary field drawing on demography, psychology, geography, and anthropology. Different government frameworks can be applied to conduct AA. Government Communication Service (2021) Guide to campaign planning: OASIS and Insight framework are examples of such frameworks.</p> <p>The Influence Programme</p> <p>The project is part of the Influence Programme which focuses on two areas: understanding audiences and delivering behavioural effects.</p> <p>In contemporary society, people communicate and interact with each other in new and complex ways, which has led to a change in traditional military operations.</p> <p>The Influence Programme develops enhanced and novel influence concepts, tools and techniques, underpinned by behavioural science, to modernise information and outreach</p>

¹ Joint Doctrine Note 2/19 Defence Strategic Communication: an Approach to Formulating and Executing Strategy (JDP 0-01.1)

	<p>capabilities. Influence is now central to military activities; words, images and actions can achieve strategic, operational and tactical influence.</p> <p>The importance of exerting the UK's influence was highlighted in the Strategic Defence and Security Review 2015. It emphasised the contribution of all defence activity and defence engagement – including all aspects of information activities and outreach and information operations – to reach target audiences.</p>
<p>1.4</p>	<p>Requirement</p>
	<p>This work is to identify and describe, through literature review, mature evidence-based methods as well as concepts, tools and technologies to increase understanding of what factors shape the identities, motivations and behaviours of overseas audiences (hostile, neutral and friendly), including the role of perceptions, beliefs, values, norms, culture and language and how they can be assessed through AA.</p> <p>The requirements, research questions and deliverables are described below.</p> <p>The supplier is to attend a start-up meeting at which they are to present their project plan. This meeting will be virtual. However, if current social restrictions permit, then the meeting will be held at Dstl Portsdown West. Cost for the face-to-face meeting are to be provided as limit of liability, ascertained cost.</p> <p>Concepts, methods, tools and technologies for overseas AA and IEA and their application</p> <p>Research questions</p> <p>The Contractor should answer the following questions when addressing the research requirements in the section below:</p> <ul style="list-style-type: none"> • What is AA and IEA in Defence? • What is the gold standard of conducting AA and IEA overseas in academia and across Defence and Other Government Departments (OGDs)? • How can Defence understand overseas audiences (including demographic, psychographic, situational, informational analyses)? • What are the novel cutting edge concepts for understanding overseas audiences including the role of perceptions, beliefs, values, norms, culture and language?

- What are the methods for understanding overseas audiences? How can these methods be applied by Defence?
- What are the novel cutting edge tools and technologies, including social media tools, for understanding overseas audiences? How can these tools/technologies be applied by Defence?
- What are the advantages and disadvantages of the tools and technologies?
- How useful are the concepts, methods and tools in meeting MOD's requirements for understanding overseas audiences?
- What are the implications of the findings for MOD?

Methodology

In addressing these research questions, the Contractor is to produce foundational research which identifies and describes methods (also considering concepts, tools and technologies) of AA, including IEA, used outside of Defence which could be used to analyse overseas audiences in a Defence operational context

- Methods are to be primarily sought that are applicable to overseas AA at a national level to identify priority audiences and could contribute to persistent audience analysis
- IEA is also to be included throughout as it is an inherent element of AA

The Contractor is to produce a handbook called *A guide to researching overseas audiences for Defence* in Microsoft Word similar to the format used in Dr Rachel Quirk, Martin Olver, Dr Max Hammond & Dr Claire Davies (2009), [The Guide to Researching Audiences](#). A draft of the handbook is to be provided to Dstl no later than 3 weeks prior to the final deadline with the final version to be delivered no later than 31 March 2022.

- This handbook is to provide a 'basic textbook' for practitioners at all skill levels describing and listing the identified methods
- The guide is to focus on describing methods of AA (i.e. demographic, psychographic, situational, informational, anthropological) and is also to consider AA:
 - Concepts;
 - Tools (for example Government Communication Service [Insight Framework](#), Guide to campaign planning: [OASIS](#), Political, Economic,

	<p>Sociological, Technological, Legal and Environmental, Informational analysis (PESTLEI), Strengths, Weaknesses, Opportunities, Threats (SWOT), Compass guide (title: How to do audience analysis), psychographic tools and technologies including social media scraping tools) and;</p> <ul style="list-style-type: none"> ○ Technologies. ● The Contractor is to develop an assessment framework for selecting appropriate AA methods with a key (i.e. suitable, unlikely to be suitable etc. for a particular type of research question e.g. qualitative, quantitative, survey etc.) ● The Contractor is to include the application of methods to case studies (approx. 2) of current audiences for example in the Indo-Pacific Region, South East Asia, Latin America, Middle East, and Eastern Mediterranean <ul style="list-style-type: none"> ○ The methods used should be at a national audience analysis level/ contributing to persistent audience analysis e.g. how to identify priority audiences within a country. ○ Potential questions include but are not limited to: Who are the priority audiences in the Indo-Pacific region for UK foreign policy and defence engagement? Who are the priority and influencing audiences in the Ukraine for MOD to counter Russian influence/ disinformation? Who are the priority audiences in the Middle East for MOD to counter Daesh influence? ○ Documents such the MOD Regional Survey: Africa out to 2045 (publically available) may be useful for this. ● The Contractor is to present their research and findings using Microsoft PowerPoint presentation to Defence stakeholders. <p>Closure Meeting and Customer Presentation</p> <p>The supplier will be required to present all work undertaken in the contract to Dstl SME and stakeholders. It is expected that this meeting will be face-to-face and will take place at Dstl Portsdown West. Cost for this meeting are to be provided as limit of liability, ascertained cost, in the event that the meeting is virtual.</p> <p>Deliverables</p> <p>Details of all deliverables and their content are provided at Section 1.6 below.</p>
<p>1.5</p>	<p>Options or follow on work <i>(if none, write 'Not applicable')</i></p>

	Not applicable.
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1.6 Deliverables & Intellectual Property Rights (IPR)							
Ref.	Title	Due by	Format	TRL *	Expected classification (subject to change)	What information is required in the deliverable	IPR DEFCON/ Condition <i>(Commercial to enter later)</i>
PO-1	Start-up meeting minutes and presentations.	CA + 10 days	MS Word	N/A	O	Soft copies of the minutes covering the start-up meeting (MS Word) and soft copies of start-up meeting presentations (MS PowerPoint). Soft copy of the Project Plan (MS Word) including a soft copy of the Project Gantt Chart (MS Project). Any updates to the project plan and Gantt chart shall be provided with the monthly contract and technical reports.	DEFCON 705
PO-2	Monthly progress update meetings via telecon.	Date to be established.	MS PowerPoint	N/A	O	Update on technical progress <ul style="list-style-type: none"> • Progress report against project schedule. • Review of risk management plan. • Commercial aspects. • Review of deliverables. 	DEFCON 705

						<ul style="list-style-type: none"> • Risks/issues. • Government Furnished Asset (GFA) 	
PO-3	Draft version of <i>A guide to researching overseas audiences for Defence: Concepts, methods, tools and technologies</i>	Date to be proposed by Supplier (approx. February 2022)	MS Word	N/A	O	Draft version of <i>A guide to researching overseas audiences for Defence: Concepts, methods, tools and technologies</i> (D-6, D-7) allowing Dstl review before finalisation. Including covering concepts, methods, tools and technologies for overseas audience analysis and the framework/ criteria for selecting methods etc.	DEFCON 705
FD-1	Final version of - <i>A guide to researching overseas audiences for Defence: Concepts, methods, tools and technologies</i>	Date to be proposed by supplier (March 2022)	MS Word	N/A	O	A guide covering concepts, methods, tools and technologies for overseas audience analysis (including social media scrapping tools) similar to Dr Rachel Quirk, Martin Olver, Dr Max Hammond & Dr Claire Davies (2009), The Guide to Researching Audiences . Framework/criteria for selecting concepts, methods or tools.	DEFCON 705

FD-2	Brief version of <i>A guide to researching overseas audiences for Defence: Concepts, methods, tools and technologies</i>	Date to be proposed by supplier (March 2022)	MS Word	N/A	O	Summary of findings of <i>A guide to researching overseas audiences for Defence: Concepts, methods, tools and technologies</i> . Approx. 2 pages.	DEFCON 705
FD-3	Application of concepts, methods and tools: Case studies of current audiences using methods and tools from literature review	Delivered with <i>A guide to researching overseas audiences for Defence</i> (March 2022)	MS Word	N/A	O	Innovative examples of results using select identified methods such as the sample audience profile to show profile of friendly, neutral, or hostile audience. Related to the geographical areas of interest and analysing audiences at a national level.	DEFCON 705
PO-4	Presentation to Dstl subject matter experts and stakeholders and end of contract wash-up meeting.	Date to be proposed-post report completion. Presentation to be sent to Dstl 5	PowerPoint and MS Word	N/A	O	Presentation in clear English explaining research aims, data, methods, findings and application to Defence. Soft copies of the minutes of the wash-up meeting (MS Word or PDF).	DEFCON 705

		working days prior to the event.				Soft copies of wash-up meeting presentations (MS PowerPoint). Presentation to be sent to Dstl 5 working days prior to the event.	
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***Technology Readiness Level required**

Notes- IPR should be inserted / checked by commercial staff before sharing with the Contractor(s) to ensure accuracy.

1.7	Standard Deliverable Acceptance Criteria
	<ul style="list-style-type: none"> • Final Reports 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. • Interim or Progress Reports: The report should detail, document, and summarise the results of work done during the period covered and shall be in sufficient detail to comprehensively explain the results achieved; substantive performance; a description of current substantive performance and any problems encountered and/or which may exist along with proposed corrective action. An explanation of any difference between planned progress and actual progress, why the differences have occurred, and if behind planned progress what corrective steps are planned. • 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. • All Reports shall be free from spelling and grammatical errors and shall be set out in accordance with the Statement of Requirement (1) above. • Failure to comply with the above may result in the Authority rejecting the deliverables and requesting re-work before final acceptance. • All Deliverables and Outputs will be subject to DEFCON 705 Full Rights.
1.8	Specific Deliverable Acceptance Criteria
	N/A

2.	Quality Control and Assurance
2.1	Quality Control and Quality Assurance processes and standards that must be met by the contractor

	<input type="checkbox"/> ISO9001 (Quality Management Systems) <input type="checkbox"/> ISO14001 (Environment Management Systems) <input type="checkbox"/> ISO12207 (Systems and software engineering — software life cycle) <input type="checkbox"/> TickITPlus (Integrated approach to software and IT development) <input type="checkbox"/> Other: (Please specify below)
2.2	Safety, Environmental, Social, Ethical, Regulatory or Legislative aspects of the requirement
	N/A.

3.	Security	
3.1	Highest security classification	
	Of the work	Official
	Of the Deliverables/ Output	Official
3.2	Security Aspects Letter (SAL)	
	Not applicable If yes, please see SAL reference- <i>Enter iCAS requisition number once obtained</i>	
3.3	Cyber Risk Level	
	Very low	
3.4	Cyber Risk Assessment (RA) Reference	
	262391328 If stated, this must be completed by the contractor before a contract can be awarded. In accordance with the Contractor Cyber Protection Risk Assessment (RA) Workflow please complete the Cyber Risk Assessment available at https://Contractorcyberprotection.service.xgov.uk/	

4.	Government Furnished Assets (GFA)				
GFA to be Issued - Yes					
<i>If 'yes' – add details below. If 'Contractor to specify' or 'no,' delete all cells below.</i>					
GFA No.	Unique Identifier/ Serial No	Description: <i>Classification, type of GFA (GFE for equipment for</i>	Available Date	Issued by	Return Date or Disposal Date (T0+)

		<i>example), previous MOD Contracts and link to deliverables</i>			<i>Please specify which</i>
GFA-1	DSTL/CR 95289	GFI: Target Audience Analysis Commissioner's Guide	Contract start	Dstl TP	Destroy at end of contract
GFA-2		GFI: Overview of Defence Information Activities	Contract start	Dstl TP	Destroy at end of contract

5.	Proposal Evaluation criteria
5.1	Technical Evaluation Criteria
	HSSRC framework evaluation criteria will be used
5.2	Commercial Evaluation Criteria
	HSSRC framework evaluation criteria will be used