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

Title of Requirement	Cultural characteristics: How to Influence cross-culturally
Requisition No.	1000166759
SoR Version	0.1

1.	Statement of Requirements
1.1	**Summary and Background Information**

	This research is intended to inform MoD and wider government understanding of how to engage and inform, influence or change the behaviour of overseas audiences. Specifically, the research will develop guidance alongside a supporting framework that will aid information activity practitioners in understanding variation in cultural dimensions to inform the design and delivery of information operations to achieve a range of effects aimed at a range of culturally-diverse audiences.
	"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.
	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 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 how an understanding of cultural variation can be exploited to achieve a range of influence effects aimed at overseas audiences.

Culture is defined as 'the way of life, especially general customs and beliefs, of a particular belief at a particular time'. Culture can impact thoughts, feelings, beliefs intentions and goals of a target group, which can in turn lead to different behaviours and actions. Variation in culture and cultural dimensions can impact an individual/group's susceptibility to influence, as perceptions of influence material are often different between cultures.

1.2	**Requirement**

Research Scope

The research will provide an overview of cultural variations within regions and countries across the globe and develop guidance and a supporting framework that will aid information activity practitioners in understanding these cultural variations and provide guidance to support the design and delivery of a range of information operations effects aimed at a range of cultural diverse overseas audiences.

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.

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, Defence wishes to understand how communications design approaches can be tailored based on cultural understanding of audiences.

The contractor shall:

1. Design a framework and approach for classifying audiences (by country / region) in terms of cultural variations in such a way that it can support the design and delivery of information operations Effects (see Annex A - Information Operations Effects).

   There are a number of approaches that could be used, such as Hofstede's 6 Dimensions of Culture, for example**.** However, are interested in any research of the same theme that would aid Defence practitioners in understanding cultural variation, and how to exploit this for best effect.

2. Categorise audiences globally using this framework and approach, with consideration of Defence and Foreign Policy objectives outlined in Annex A.

3. Create a profile and explanation of cultural characteristics for each category.

4. Outline and explain how information operations design and delivery can be tailored to each of these cultural categories in terms of:

   a. Communications strategy i.e. how to reach and engage with audiences

   b. Communications design i.e. how to design messaging and communications to achieve specific Effects (see Annex A - Information Operations Effects).

   NB. We are fundamentally interested in culturally sensitive aspects of strategy and design and how these differ – rather than explanation of general approaches common to a range of cultural diverse audiences, though where these are common then reference should be made to these.

5. Develop cultural category based practitioner guidance including step-by-step frameworks on how to use cultural characteristics for information operations design and delivery

incorporating the above elements i.e. what are the components of culture and how can this understanding be utilised when designing influence activities to achieve different Effects.

Where possible the guidance will provide simple illustrative examples of how different culturally sensitive approaches can be designed and employed for various communications channels, for example the design of social media messaging, video, audio, posters, cartoon, memes, person-to-person contacts etc.

In addition guidance should be illustrated with real-world case studies to provide context and a deeper understanding how these culturally sensitive approaches have been applied.

The research will also 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:

- 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
- The **audiences' attitude** to the UK and UK Defence i.e. whether the audience is hostile, neutral, or friendly
- 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 NATO how can you persuade audiences that have little or no real understanding of what NATO 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.
- The **medium by which the communication is delivered** e.g. the online and offline channels that are used.

The contractor will consider these factors and how they might impact on any culturally sensitive approaches applied. These factors will be critically reviewed, and the contractor may suggest other or additional important contextually factors of note when deciding which strategy is most suitable to achieve an effect.

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

Research Approach

The Contractor shall design a research approach to achieve the stated requirements. However, as a minimum, the research approach shall include:

- A review of relevant published research relating to cultural dimensions and variation in culture and influence strategies related to these
- A comparative review of influence campaigns cross-culturally, with a focus on different elements of cultural variation that might subsequently affect variation in influence campaigns cross-culturally
- A comparative review of culturally sensitive elements of influence campaigns and information operations in different settings, with a focus how these differ depending on context (i.e. audience, setting, desired effect)
- Focus on campaigns that may be of relevance or be applicable to Defence (see Annex A)
- Include as a minimum: academic publications; research industry published research; industry published research

The contractor should not be limited to the mandated approach outlined above and is free to propose additional research strands and outputs, for example the contractor may suggest primary research, such as quantitative data collection or qualitative approaches, as part of their proposed approach or real world testing of frameworks and guidance.

Reporting Requirements

Table 1.6 provides a breakdown on Deliverables for this research. Key deliverables are described below:

Guidance and supporting framework

The key output is the development of a framework(s) and supporting guidance aimed at both those new to information operations and current practitioners.

In order to support Information Operations capabilities Defence must be able to exploit its understanding of cultural variation in information operations design and delivery, the user guidance must therefore provide clear and non-technical guidance on how to design culturally sensitive information operations in different influence settings and for different Effects.

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.

The guidance will include case studies that clearly show how different cultural sensitive strategies were used, and why these strategies were chosen to achieve best effect in that circumstance. Contractors will develop case studies covering each cultural category.

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.

Two-page summaries

A two-page non-technical summary will be produced for each cultural category. The summaries will outline key characteristics and design guidance, and be illustrated with a relevant case study.

1.3	**Options or follow on work** *(if none, write 'Not applicable')*	
	N/A	
1.4	**Health & Safety, Environmental, Social, Ethical, Regulatory or Legislative aspects of the requirement**	
	N/A	

1.5	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 *(Commercial to enter later)*
1	Start-up Meeting Presentation	Presentation 2 working days prior to meeting Meeting within 2 weeks of contract award (CA).	MS PowerPoint	NA	OFFICIAL	Presentation pack to include but not limited to: • Proposed activity, resourcing and timelines. • Review of risk management plan. • Review of intended deliverables and deadlines.	DEFCON 705 Wish to circulate across UK Govt.
2	Classification Design Approach Note	To be specified by contractor	MS Word	NA	OFFICIAL	A short technical note (no more than 10 pages) describing the proposed classification approach referencing supporting evidence for the recommended approach.	As above
3	Technical Report	T+6 Months	MS Word	NA	OFFICIAL	A short technical report (no more than 40 pages). To include, though not limited to: a. Introduction and background to the research b. The overview of methodology used c. High level findings from the research d. Overview of case studies e. A standalone Executive Summary	As above

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						f. Conclusions and recommendations, where appropriate, for further research and development within this area.	
4	Framework and guidance	T+6 Months	MS Word / MS Power Point, Excel	NA	OFFICIAL	As specified within 1.4. Requirement	As above
5	Two-page summaries	T+6 Months	To be confirmed	NA	OFFICIAL	As specified within 1.4. Requirement	As above
6	Customer Presentation /& Closure Meeting	Presentation 5 working days prior to meeting. Meeting held by T+7 months	MS PowerPoint	NA	OFFICIAL	To include, though not limited to: a. Introduction and background to the research b. The overview of methodology used c. High level findings from the research d. Overview of case studies e. A standalone Executive Summary f. Conclusions and recommendations, where appropriate, for further research and development within this area. g. Demonstration of the framework/guide	As above

1.6	Deliverable Acceptance Criteria
	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. 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 above. Failure to comply with the above may result in the Authority rejecting the deliverables and requesting re-work before final acceptance.

2	Evaluation Criteria
2.1	Method Explanation
	This requirement will be competed and awarded on the basis of the Value for Money Index (VFM Index) evaluating Technical and Price using a lowest price per technical point scored. This will be ascertained by dividing each bidder's quoted price by their own final moderated technical score. All bids received by the closing date will be assessed against the tender evaluation process detailed below. The Authority will use an evaluation model consisting of three criteria as follows: • Commercial: PASS / FAIL • Technical • Pricing
2.2	Technical Evaluation Criteria

Technical evaluation will be carried out by a team of between 3 to 5 assessors who will review the technical proposals independently and then bring their scores to a moderation meeting. The moderation meeting will be chaired by the Dstl Project Manager.

The moderation meeting will discuss each Tenderers response in turn and attribute a moderated technical score to each of the technical criteria and a final score calculated. Technical criteria is provided overleaf.

Please see beneath for further information on how each limb will be scored:

Ref	Criteria	Available Score	Weighting	Total Available Score
T1	The proposal clearly demonstrates that the Contractor understands the requirement.	0-5	1	5
T2	The proposal provides details of key risks, dependencies, assumptions and any relevant ethical issues the Contractor has identified.	0-5	1	5
T3	The proposal clearly demonstrates that the Contractor has the expertise and knowledge to successfully deliver the requirement.	0-5	2	10
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.	0-5	2	10
T5	The proposal clearly demonstrates that the Contractors proposed approach will fully address all the key research questions / mandatory requirements stated in the RCA. Proposal should include the following: a detailed work breakdown structure, schedule, roles and responsibilities.	0-5	6	30
				60

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	• 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	• Demonstrate**s 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	• Demonstrate**s** 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	• 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	• 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	• Provides a comprehensive overview of key risks, dependencies, assumptions.
4 = Fully meets	• Provides a close to comprehensive overview of key risks, dependencies, assumptions.
3 = Adequately meets	• Provides a satisfactory overview of key risks, dependencies, assumptions.
2 = Fails to meet in a minor respect	• Provides a limited overview of key risks, dependencies, assumptions.
1 = Fails to meet in a major respect	• 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	• Demonstrates comprehensive expertise of relevance to the requirement.
4 = Fully meets	• Demonstrates close to comprehensive expertise of relevance to the requirement.
3 = Adequately meets	• Demonstrates satisfactory expertise of relevance to the requirement.
2 = Fails to meet in a minor respect	• Demonstrates limited expertise of relevance to the requirement.
1 = Fails to meet in a major respect	• 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	• Demonstrates that the project team has comprehensive expertise and relevant experience to successfully deliver this requirement.
4 = Fully meets	• Demonstrates that the project team has close to comprehensive expertise and relevant experience to successfully deliver this requirement.
3 = Adequately meets	• Demonstrates that the project team has satisfactory expertise and relevant experience to successfully deliver this requirement.
2 = Fails to meet in a minor respect	• Demonstrates that the project team has limited expertise and relevant experience to successfully deliver this requirement.

Score	Key Indicators
1 = Fails to meet in a major respect	• 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	• 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	• 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	• 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	• 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; • Demonstrates only limited awareness of key challenges and how these may be addressed.
1 = Fails to meet in a major respect	• 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.

The weighted scores on each limb will be added together to give a final technical score. Each technical assessor will perform an individual evaluation and then a final moderated technical score will be arrived at in the moderation meeting.

Pricing
The price of each proposal will subsequently be divided by the final moderated technical score to arrive at the lowest price per technical point scored. The bidder with the lowest price per technical point scored will be adjudged as the winner.
Example:
Supplier A submits a proposal costing £150,000. Their proposal receives a final moderated score of 50.
£150,000/50 = £3000 per technical point scored.

Supplier B submits a proposal costing £125,000. Their proposal receives a final moderated score of 40.
£125,000/40 = £3125 per technical point scored.
In this scenario, Supplier A would be the winner as their price is lower per technical point scored.

2.3	Commercial Evaluation Criteria

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.

The Authority reserves the right to reject any Tender if a supplier scores a 'Fail' in any of the criteria below.

Ref	Sub-Criteria Description	Scoring Range	Sub-Criteria Weighting	Maximum Weighted Score
C1	Please submit your full firm price breakdown for all costs to be incurred, including: • 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**

The score (Pass/Fail) awarded to each of the Commercial Sub-criteria will be in accordance with the following definitions:

Score	Definition
Pass	Fully meets the Authority's requirement. Provision and acceptance of the sub-criteria information in the format requested, which is clear, unambiguous and transparent.
Fail	Unacceptable/Nil Return. Tenderer did not respond to the question or the response wholly failed to demonstrate an ability to meet the sub-criteria requirement.