



NATO STRATEGIC COMMUNICATIONS CENTRE OF EXCELLENCE

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INVITATION TO TENDER (ITT): INFORMATION ENVIRONMENT ANALYSIS OF DETERRENCE SCENARIO

To be supplied to the NATO Strategic Communications Centre of Excellence (NATO StratCom COE)

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Invitation to tender (ITT): Information Environment analysis of deterrence scenario

1. Entities are invited to submit a tender to provide analysis of the impact of NATO communications in the Russian Federation Information Environment (RFIE) over a four-month period.
2. Acceptance is bound by the guidelines set out in this document. Please confirm via e-mail safe receipt of this letter within two working days, together with confirmation of your intention to tender.
3. To simplify exchange of information regarding this Invitation to Tender (ITT) please nominate a Bid Manager and relevant contact details of phone and e-mail address.
4. Questions regarding the ITT content or process should be referred to Mr Ben Heap. You should not contact other NATO StratCom COE personnel unless directed to do so by the appointed NATO StratCom COE representative.
5. The NATO StratCom COE reserves the right to disqualify and reject proposals from suppliers who do not comply with these guidelines. All questions should be submitted in writing to the e-mail: Benjamin.heap@stratcomcoe.org
6. The NATO StratCom COE makes no obligations to:
 - a. Pay any supplier for an ITT response;
 - b. Award the contract with the lowest price proposal or any Bidder;
 - c. Accept any ITT information received from suppliers;
 - d. Include suppliers responding to this ITT, in any future invitations;
 - e. Any other commitment to suppliers whatsoever.

Authorised

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Whilst care and attention has been exercised in the preparation of this document, it remains subject to contract and all warranties whether express or implied by statute, law or otherwise are hereby disclaimed and excluded.

These limitations are not intended to restrict continued business discussions between the NATO StratCom COE and suppliers.

Any proposal received by the NATO StratCom COE is subject to contract with the NATO StratCom COE.

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1. INTRODUCTION.

1.1. The NATO Strategic Communications Centre of Excellence (NATO StratCom COE) contributes to Strategic Communications (StratCom) capabilities within the Alliance and Allied nations. The NATO StratCom COE designs programmes to advance StratCom doctrine development and harmonisation, conducts research and experimentation to find practical solutions to existing challenges, identifies lessons from applied StratCom during operations and enhances training, education and interoperability.

1.2. The NATO StratCom COE has a project underway which aims to improve the Alliance's ability to measure the effectiveness of deterrence communications. As part of this research, the NATO StratCom COE will engage the services of an entity to provide a proof of concept analysis on the impact of NATO's communication in the Russian Federation Information Environment (RFIE).

1.3. This competitive tender is part of the process by which services are procured by the NATO StratCom COE. The contract will be awarded one week after the announcement of the winner. The contract shall be finalised by December 31st 2021 and work completed by July 31st 2022.

2. BACKGROUND.

2.1. Deterrence is 'the convincing of a potential aggressor that the consequences of coercion or armed conflict would outweigh the potential gains'. The most often used model to describe the essential elements of deterrence uses credibility, capabilities and communication. This research will focus on the communication aspect.

2.2. Communication in this context could also be described as 'signalling' or 'messaging' and refers predominantly to the means for communicating about activities, rather than the activities themselves. However, as activities are normally the 'trigger' for communications, they need to be considered as context.

2.3. With communication conducted by public affairs and public diplomacy within the NATO command structure and through nationally owned capabilities, there is a desire to improve coherence across the range of activities that form part of the Alliance's deterrence approach.

2.4. The monitoring and assessment of deterrence messaging is a key part of this approach to review and identify ways of improving coherence, and the focus of this project's effort.

2.5. Deterrence is proof negative (i.e. measuring deterrence effect is not observable) therefore indirect indicators and metrics must be used to support a qualitative assessment of progress towards the objectives of an overarching plan. By taking this approach, the project research will aim to understand the impact of Alliance communications on the RFIE.

2.6. The 'Alliance' in this context refers to the NATO command structure (NATO HQ, SHAPE, ACT etc) and NATO member states.¹ Research will most likely focus on the higher levels of the command structure such as NATO HQ.

2.7. The research will use an adapted version of a monitoring and evaluation model for deterrence activities currently being tested by the NATO StratCom COE. Components of the model are considered sensitive, therefore certain details are omitted from this ITT.

¹ It is not desirable or necessary to monitor and analyse all NATO nations, analysis will therefore be limited to the most relevant to support the proof of concept e.g., USA, GBR, DEU, FRA, TUR, CAN.

2.8. The model identifies a deterrence objective as 'Russian Federation deterred from Action Y in Context Z'. From this objective, Measures of Performance² (MoP) and Measures of Effect³ (MoE). These will then be used to make an assessment of *effectiveness*.

2.9. The research required is one component of testing the model, focusing on the development of metrics and indicators and how they are articulated, measured and assessed. It is understood that there will be a balance between broad (timespan analysed) and deep (level of granularity).

2.10. The NATO StratCom COE will provide a deterrence objective broadly based on 'State Actor X is deterred from Action Y in Context Z.' This will be supported by courses of action and desired effects, and will be used as the basis for developing indicators and metrics.

3. REQUIREMENTS.

3.1. In cooperation with the NATO StratCom COE, develop and identify suitable indicators and metrics of both performance and effect based on the deterrence objective and supporting effects.

3.2. Using publicly available information and data sourced through specialist tools, collect, collate and analyse data to develop MoP and MoE covering the historical period October 2021-January 2022 (inclusive). This should include a baseline, so the timeline analysed can be adjusted if an earlier baseline is needed. The period may shift depending on geopolitical developments in 2022, however four months should be considered for resourcing.

3.3. Indicators and metrics will relate to NATO communications (both earned and owned) and their impact on the RFIE. The RFIE is not limited to discourse in traditional / social media, but also includes significant actions which 'trigger' communication such as exercises, troop movements and capability demonstrations.

3.4. Key indicators include topics such as (but not limited to) summits, exercises (NATO and significant national exercises), public statements, capability demonstrations, media coverage, and social media coverage.

3.5. Key metrics include the reach and impact of NATO communications in the RFIE, including assessments on channels, messengers, volume, narratives, themes and topics and audience sentiment.

3.6. Sources should include open source media such as news organisations, blogs, social media (Twitter, Facebook, online forums).

² MoP accounts for the process and execution of an operation or activity such as number of statements, social media posts etc.

³ MoE – a situational assessment that provides a snapshot of the extent to which a desired effect has been achieved.

3.7. The research should be delivered in an English language report. This can be compiled using the service providers own in-house style, but a copy of the report in standard MS Word format should also be provided.

3.8. The service provider should be prepared to provide a briefing of the key findings of the research to NATO HQ and internally at the NATO StratCom COE. The research will also be used in a workshop in 2022 (timing TBC).

3.9. As this is a sensitive issue area, components or the entirety of the final research will not be placed in the public domain. Distribution will be strictly limited and controlled by the NATO StratCom COE.

4. REPORTING (timings approximate).

4.1. Meeting in January 2022 to clarify and confirm the methodology, scope, research objectives and delivery process.

4.2. Methodology and scope confirmed by end February 2022.

4.3. Initial draft of the report by end May 2022.

4.4. Final report delivered by end July 2022.

5. TENDER SUBMISSION.

5.1. The tender submission should consist of:

5.1.1. A brief written proposal for the delivery of the work as listed above (See section 3. Requirements);

5.1.2. A budget breakdown, in EUR, for the research and report (with VAT and without VAT; other tax must be clearly specified for each budget position, marked as zero where not applicable).

5.1.3. Copy of Bidder's Certificate issued by the national Commercial Register. If that is not applicable (for example, the Bidder is an individual), please provide an explanatory statement and a different form of a document confirming your identity and, if possible, permit to engage in a commercial activity.

5.2. The Bidder should demonstrate:

5.2.1. Organisational and logistical capabilities, as well as cultural and language knowledge to analyse the RFIE.

5.2.2. Ability to use a wide range of specialist tools to collect, collate and analyse open-source intelligence.

5.3. Evidence of experience with previous projects of a similar nature and statement of previous work experience from the last three years. The following information is required for the Bidder to be eligible for selection:

5.3.1. Evidence of previous research in the RFIE;

5.3.2. Evidence of previous projects involving the collection, collation and analysis of open source data;

5.3.3. Evidence of experience with working with international customers or participation in international projects;

5.3.4. Profile of key personnel working on the Contract delivery providing evidence of their skills and experience. The Bidder should indicate the roles of the personnel working on the Contract delivery and the approximate time allocated to different phases;

5.3.5. At least two references from former customers (can be in email form with visible contact details, date and time when issued and recipient's address to whom the reference was emailed).

5.4. Information regarding persons or entities that the Bidder may choose to sub-contract for work on the Contract delivery (company or person's name, other relevant credentials (like company registration number, website address, contacts, etc), and a short company profile or person's biography).

6. TIMETABLE.

General	
Confirmation of bid	Please confirm you have submitted your bid by notifying Benjamin.heap@stratcomcoe.org
Deadline for submission	11:00 hrs (Eastern European Time zone: UTC +02:00) Dec 20 th 2021
Contract implementation date	Upon agreement
Questions	Questions arising from this document should be given to Mr Ben Heap until Friday 17 th December
Full contact details	Mr Ben Heap Benjamin.heap@stratcomcoe.org, +371 2 8693077

7. RESPONDENT INSTRUCTIONS.

7.1. A written proposal is required that complies with the indicated requirements (see Section 5. Tender Submission). The proposal should be submitted electronically, in PDF format.

7.2. The file should be submitted to: tender@stratcomcoe.org by 11:00 hrs (EET / UTC+02:00) **Dec 20th 2021**.

7.3. Submissions after the deadline will not be considered.

7.4. Bidders are expected to supply the required information or state clearly any reason for being unable to do so.

7.5. Any assumptions used in preparing responses should be clearly stated. Any appropriate supporting documents (brochures, demo videos, presentations) should be included.

7.6. If any of the requested documents in section 5 (Tender submission) is not submitted, the Contract Award Committee has the right to exclude the applicant from further participation in the procurement.

7.7. Questions relating to clarification of the ITT will only be accepted in writing to NATO StratCom COE representative. Likewise, all responses from the Centre will be written and may also be made available to other suppliers (subject to confidentiality). In the event that any answer materially affects the ITT specification, an amendment of the original requirements will be sent to all suppliers. The NATO StratCom COE will attempt to answer any questions within one working day of receipt of that request; otherwise it will respond within that timescale notifying you of the estimated time to obtain the information.

7.8. The NATO StratCom COE reserves the right to modify the provisions of this ITT at any time prior to the scheduled date for written responses. Additional scope and requirements can be added. Notification of such changes will be provided to all suppliers.

7.9. Should you wish to propose a deviation from the specification please ensure that you clearly identify and highlight where appropriate in your response.

7.10. All information supplied in this tender to date, any further information supplied during the tender process will remain confidential and available only to the Contract Award Committee members.

8. TENDER ASSESSMENTS.

8.1. Evaluation Criteria and Process. A set of evaluation criteria has been prepared by the NATO StratCom COE for the evaluation of every submission. At each stage an initial evaluation will consider whether or not every instruction and requirement contained within the ITT has been fulfilled.

8.2. Evaluation criteria is based on 'best value', an objective assessment by the Contract Awarding Committee as to who offers the best combination of price and service. The following is considered, in order of no significance:

8.2.1. Cost.

8.2.2. Quality of service provision:

8.2.3. Previous experience with conducting similar projects in the RFIE ;

8.2.4. Previous experience with developing comparative analysis of open source data;

8.2.5. Experience of cooperation with government institutions and/or international organisations;

8.2.6. Level of compliance with the requirements and deliverables of the ITT.

8.3. Bidders are reminded that through the process the NATO StratCom COE will continually assess all contact with the Bidders' organizations including compliance to the process and presentation. The NATO StratCom COE reserves the right at its sole discretion to disqualify without further consideration any submission that does not satisfy this basic requirement.

9. BRIEFING FOR UNSUCCESSFUL SUBMISSIONS.

9.1. The NATO StratCom COE reserves the right to control the format and content of any such briefing, and to limit it in any way believed by the NATO StratCom COE to be appropriate. Including, in exceptional circumstances, the right to refuse a briefing without giving reason.

10. CONTRACT DETAILS.

10.1. Contractual and payment details are subject to negotiation with the selected supplier.

10.2. The NATO StratCom COE reserves the right to modify the scope of this tender, after receiving the bids, to include price estimates.