

Invitation to Tender for the Provision of Research in Analysis of Russian Information Operations outside of the Western Information Environment

You are kindly invited to submit a project proposal to provide research in Russian information operations outside of the Western information environment.

By participating in this tender you are indicating your acceptance to be bound by the guidelines set out in this document. Please acknowledge safe receipt of this letter via e-mail within two working days and your confirmation of your intention to tender within seven working days.

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.

Please direct any questions regarding the ITT content or process to Mr. Mario Nicolini. You should not contact other NATO StratCom COE personnel unless asked to do so by the appointed NATO StratCom COE representative.

The NATO StratCom COE reserves the right to disqualify and reject proposals from service providers who do not comply with these guidelines. All questions should be submitted in writing to the e-mail: Mario.Nicolini@stratcomcoe.org.

The NATO StratCom COE makes no obligations in any way to:

- (i) pay any service provider for an ITT response;
- (ii) award the contract with the lowest price proposal or any service provider; or
- (iii) accept any ITT information received from service providers; or
- (iv) include service providers responding to this ITT, in any future invitations; or
- (v) any other commitment to service providers whatsoever.

Looking forward to receiving your response.

Yours sincerely,

Mr. Mario Nicolini
Senior Expert, Operational Support Branch
E-mail address: Mario.Nicolini@stratcomcoe.org

Whilst care and attention has been exercised in the preparation of this document, it remains subject to contract, and all warranties, whether expressed 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 service providers.

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. NATO Strategic Communications Centre of Excellence (NATO StratCom COE), based in Riga, Latvia, 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 and education efforts and interoperability.
- 1.2. NATO StratCom COE is running a tender to conduct analysis of Russian information operations outside of the Western information environment.
- 1.3. The contract will be awarded within two weeks after the announcement of the winner. The contract shall be executed by **31 December 2023**.

2. Background

- 2.1. In the war against Ukraine, Russian narratives are spreading and resonating in Latin America, Africa and Asia. There is a need for more detailed descriptions of the tactics used by Russia to influence perceptions in third nations through framing of the West and Western agendas. NATO StratCom COE should be engaged in a more structured analysis of specified countries outside of the Western information environment, which are currently a highly relevant target of Russian disinformation in connection to the increasing energy and food prices.

3. Requirements

- 3.1. The project aims to provide an assessment of Russian information operations outside of the Western information environment, especially related to the war in Ukraine and including the specific topics of energy and food (in)security, and the possible ramifications for Western countries in the short to medium term, focusing on an initial set of case studies. The work should provide practical support to public communicators of NATO members and stakeholders in third countries.
- 3.2. The main output will be an analytical study which will seek to answer the following research questions:
 - A. Concerning Russia's information operations:
 - 1) To which audiences is communication targeted?
 - 2) Which Russian narratives are resonating in the countries concerned?
 - 3) What are the current and historical circumstances of those affected countries likely to be creating a receptive environment to Russian narratives?
 - 4) Who are the main actors of communication?
 - 5) Can targeted operations be identified?
 - 6) What tactics, techniques and procedures are used in these operations?
 - 7) Are local media manipulated and instrumentalised and how?
 - 8) What are the effects of these operations?
 - B. Concerning Western strategic communications:
 - 1) Which narratives compatible with Western values and interests are working in the countries concerned?
 - 2) Which are the most susceptible audiences?
 - 3) Who are the actors of communication, and can be considered as potential allies?

- C. What are the short- and medium-term (1-3 years) ramifications for Western countries in terms of:
- 1) Voting in international bodies including the UN Security Council and UN General Assembly.
 - 2) Food security. How have Russia and pro-Russian actors in the region framed the grain shortage in their favour? Success or failure for Russia: which factors contributed to success or failure?
 - 3) Energy security. How have Russia and pro-Russian actors framed the rising prices of gas and oil products?
 - 4) Other topics used by Russia to frame the West and Western agendas, e.g. local perceptions of deployed EU/NATO forces.

3.3. The deliverables include the following:

3.3.1. In cooperation with the NATO StratCom COE and its partners, develop a common methodology suitable for analysing the information environment that will be applicable to a wide range of case studies from Asia, Africa, and Latin America. This line of effort should consider tested methods applied by government institutions and/or international organisations, as well as those used in the private sector.

3.3.2. Produce case studies based on the common methodology, focusing on Mali, Kenya, Egypt, United Arab Emirates, and South Africa. Country-based research should highlight regional and subnational connections if Russia exploits international or subnational (e.g. tribal) approaches in the region. Each case study should be approximately 5 000 – 6 500 words in length, excluding references, footnotes, and appendices.

3.3.3. Develop conclusions and policy recommendations.

3.3.4. Develop an executive summary based on the research report of around 2 000 words in length.

3.3.5. Deliver a briefing of the key findings of the research to cross-government stakeholders and civil society actors as relevant organized and funded by the NATO StratCom COE.

3.4. The research should be published by the NATO StratCom COE on its website and possibly in printed form.

3.5. NATO StratCom COE is looking to contract one service provider to implement all deliverables listed above. The service provider must provide all parts (paragraph 3.3.) of the research. The service provider is encouraged to partner or subcontract with experts and/or NGOs in the countries or regions covered by the report in order to analyse and interpret data, conduct interviews (as relevant), and disseminate the outputs.

3.6. The service provider is expected to actively solicit and integrate inputs by the NATO StratCom COE and its partners by applying a fully transparent and inclusive process throughout the project period. This may include overseeing additional contributors in order to ensure, in particular, the application of the common methodology and the overall coherence of the output.

3.7. The NATO StratCom COE suggests the employment of advanced information environment monitoring tools, which allow analysis in local languages.

3.8. The service provider is expected to participate in a review process of the submitted report and incorporate feedback from the NATO StratCom COE into the work, and offer suggestions and data for graphs, illustrations and supporting material for the final publication of the report.

- 3.9. The service provider should be prepared to travel (or connect virtually should the pandemic situation prevent travel) in order to present the outcomes of the research at events organised and funded by the NATO StratCom COE:
- A. Methodology workshop in June 2023 (tbc).
 - B. Briefing of the key findings of the research either at the end of 2023 or in early 2024.

Exact details will be clarified during Contract negotiations.

- 3.10. The service provider is expected to submit the analytical study in academic English language, providing appropriate referencing, following the NATO StratCom COE style guide. The NATO StratCom COE is responsible for the English language editing as necessary, the layout, and the printing of the publication as decided.
- 3.11. The service provider is expected to provide relevant data sets produced in the research process (for example, data collected through analytical tools, documents, publications, interviews etc.).

4. Reporting (timings approximate)

- 4.1. Meeting to clarify and confirm the approach, scope, research objectives and delivery process as soon as the tender has been awarded (via videoconference or other means).
- 4.2. Draft methodology for review and comments by May 21, 2023.
- 4.3. Mature methodology in time for Methodology Workshop by May 31, 2023.
- 4.4. Final methodology agreed by June 30, 2023.
- 4.5. Initial draft of the report (including raw data) by September 30, 2023.
- 4.6. Final report delivered by November 15, 2023.
- 4.7. NATO StratCom COE may request progress updates throughout the project period.

5. Tender Submission

5.1. The tender submission should consist of:

- 5.1.1. A brief written proposal (around 5 pages) for the delivery of the work (see parts 3.2 and 3.3 in Requirements). The proposal should include a preliminary approach of how to address the research questions, what data would be collected and what outputs would be produced with the data. To the extent possible, describe the information environment analysis tools that the service provider intends to use in producing the report.
- 5.1.2. A total budget for the full proposal and a budget breakdown, in EUR (with VAT and without VAT; other tax must be clearly specified for each budget position, marked as zero where not applicable). Provide budget estimates for each output, indicating the costs for:
 - A. Methodology development.
 - B. Case studies of Mali, Kenya, Egypt, United Arab Emirates and South Africa – include individual breakdown per country (important).
 - C. Conclusions and policy recommendations.
 - D. Executive summary.

The budget should include milestones for suggested payments.

- 5.1.3. Copy of service provider’s Certificate issued by the national Commercial Register or a national Register covering other types of legal entity (for example, civil society organisations). If that is not applicable (for example, the Service provider is an individual), please provide an explanatory statement and a different form of a document confirming your identity and, if possible, a permit to engage in a commercial activity.
- 5.2. The service provider should demonstrate the ability to use a wide range of specialist tools to collect, collate and analyse open-source intelligence.
- 5.3. Evidence of experience working with international customers or participation in international projects on previous projects of a similar nature concerning Africa, the Middle East and strategic communications. The following information is required for the service provider to be eligible for selection:
 - 5.3.1. Statement of previous relevant work experience from the last three years.
 - 5.3.2. Profile of key personnel working on the Contract delivery providing evidence of their skills and experience. The service provider should indicate the roles of the personnel working on the Contract delivery and the approximate time allocated to different phases.
- 5.4. Information regarding persons or entities that the service provider may choose to sub-contract for work on the Contract delivery (company or person’s name, other relevant credentials, e.g. 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 Mario.Nicolini@stratcomcoe.org
Deadline for submission	23:59 hrs (Eastern European Time zone: UTC +02:00) on 16 April 2023
Contract implementation date	Upon agreement
Questions	Questions arising from this document should be addressed to Mr. Mario Nicolini until 9 April 2023
Full contact details	Mr. Mario Nicolini, Mario.Nicolini@stratcomcoe.org , +371 28 7878 51

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 using an official email of the entity, in PDF format (and Word/Excel format by request).
- 7.2. The file(s) should be submitted to: tender@stratcomcoe.org by 23:59 hrs (Eastern European Time zone: UTC +02:00) on 16 April 2023.
- 7.3. Submissions after the deadline will not be considered.

- 7.4. The service provider is 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 service provider 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 service providers (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 service providers. The NATO StratCom COE will attempt to answer any questions within two working days of receipt of that request; otherwise it will respond within that timescale notifying the service provider 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 service providers.
- 7.9. Should the service provider 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 (based on the evidence provided).
 - 8.2.3. Previous experience with conducting similar projects; developing analysis of open source data; and qualifications on Africa, the Middle East and strategic communications of the key personnel working on the Contract delivery.
 - 8.2.4. Experience of cooperation with government institutions and/or international organisations.
 - 8.2.5. Level of compliance with the requirements, reporting and deliverables of the ITT.

8.3. The service provider is reminded that through the process the NATO StratCom COE will continually assess all contact with the service providers' 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. Decision Announcement to Participants

9.1. The NATO StratCom COE reserves the right to control the format and content of any such announcement, and to limit it in any way believed by the NATO StratCom COE to be appropriate (which includes the right to not provide any explanation).

10. Contract Details

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

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