

# **Terms of Reference for contractor(s) to produce audience analysis on Estonia, Latvia and Lithuania**

## **INTRODUCTION**

The Foreign and Commonwealth Office are looking for a primary contractor to research and produce audience analysis on Estonia, Latvia and Lithuania.

## **OBJECTIVE**

To provide research to inform British policy makers on the socio-cultural background of individuals and their general perceptions and attitudes, and specifically their attitudes towards the UK and the West. This research will provide a detailed insight into why/how these attitudes and perceptions were established; identify opportunities to help HMG appropriately communicate with predominantly Russian speaking audiences; and provide a benchmark against which the impact of future activity by HMG can be measured.

### **1. Background**

Mass media in Eastern Europe is currently dominated by either Kremlin controlled channels that deliver propaganda and tendentious programming or by oligarch owned channels that serve vested interests and seek to stymie reform. The current media landscape in Eastern Europe therefore acts as a block to reform and economic progress in the region. Continued Kremlin domination of Russian language media increases the risk of future conflict in the region.

Russian speaking audiences in Europe tend to rely heavily on Russian state-controlled media for general entertainment and news programming - the content of which contains information that could be classified as propaganda and misinformation, intended to confuse its audience and, over-time, change the audiences' perceptions and attitudes towards HMG and our partners. This media is consumed either directly through distributed channels or indirectly through content being carried by partner stations.

A UK Government programme is seeking to bring plurality in the Russian language media space through an Official Development Assistance (ODA) eligible range of capacity building efforts including:

- Direct support for independent media in Belarus, Moldova, Ukraine, the Caucuses and Central Asia. (i.e. in DAC list countries)
- Support for regional media initiatives such as the Russian language news exchange and the establishment of a content production hub
- Work with governments on media landscape regulation
- Development of a public broadcasting ethos and quality production values

- Parallel, non-ODA eligible work is taking place in non DAC list countries. The audience analysis and monitoring work in ODA eligible countries is clearly delineated by geographic scope.
- Media interventions in the European Neighbourhood have been developed on the basis of a range of evidence but there are no standardised sets of data from across the region that defines audience outlook, demand for specific products and consumption habits.

Developing a set of data and sharing it with other donors will allow for the improved targeting of interventions and lead to a greater impact from them. HMG's subsequent contracts to measure audience attitudes and media consumption habits are the planned method by which the impact of our interventions will be evaluated.

## **2. Desired Outcomes**

The aim is to inform UK policy makers' understanding of households which are predominantly Russian speaking by providing analysis of:

- The socio-cultural background of individuals
- Their general perceptions and attitudes
- Their attitudes towards the UK and the West
- Existing or potential grievances against their national government
- Why/how attitudes and perceptions were established
- Channels and messages that could help HMG and partners to appropriately engage with different sub-groups

The outputs from the research must provide baseline measurements against which changes and progress (identified via the outputs from the TAA) can be assessed over time and to measure the impact of UK interventions.

The outputs will also need to be compared against a control group from the population at large.

The main themes the research will cover include:

- Satisfaction with Government
- Attitudes towards life
- Perceptions of Russia and the Russian Administration
- Perceptions of the West (e.g. NATO, UK, the EU)
- Attitudes towards the future
- Media consumption (e.g. Russian language media, local media, international media)

Media consumption analysis will also include quantitative audience analysis by channel and the perceived credibility of different media sources (including some sources suggested by the FCO) to inform UK Government strategic communications strategies to improve messaging and communications in the region.

The outputs from the TAA must provide baseline measurements against which changes and progress (identified via the outputs from the TAA) can be assessed over time and to measure the impact of UK interventions.

The FCO is seeking bids for:

**Estonia, Latvia and Lithuania TAA (maximum budget £700k)**

### **3. Proposal/Project scope**

The specific research objectives the TAA should address are listed below.

#### 3.1 Identity of audience including attitudes and perceptions:

- I. To identify current life motivations and desires
- II. To identify what their key interests are, their likes, hobbies etc.
- III. To identify their current satisfaction of life and their attitude towards it
- IV. To identify what their biggest fears and concerns are, and why that is, and who do they perceive can address these fears and concerns
- V. To establish what they perceive to be their biggest challenges
- VI. To establish their perception of close neighbours and why
- VII. To identify their perceptions of current world events and, where relevant, the reason for these events.

#### 3.2 Preferred vision of the future (future attitudes/perceptions)

- I. To identify their hopes/dreams/aspirations for the future for themselves and their families
- II. To identify where they would emigrate to if they considered it
- III. To identify what they see as the biggest risk to the future and how they see it could be overcome
- IV. To identify what would be the benefits of closer relations with UK/NATO/EU as opposed to closer relations with Russia.

#### 3.3 Impact of, and level of support for the Russian Administration

- I. To identify the extent to which the Russian Administration is regarded as able to meet the basic needs of the audience as opposed to their national government, and whether it is perceived as offering a credible vision for the future
- II. To identify the extent to which the Russian Administration is regarded as able to provide prosperity, stability and security for the audience as opposed to their own national government
- III. To understand the levels of tolerance and support for the Russian Administration and the motivation behind any areas of antipathy towards Governments in the region
- IV. To understand the current perception and attitude towards Russia and its Administration, including their handling of recent events (Ukraine, Syria, MH17 passenger aircraft etc.)
- V. To identify if Russia and the Russian Administration are perceived as a force for good in the world.
- VI. To provide comparative analysis of Russian/ UK/US/ selected country /Nordic/ EU /NATO “soft power” amongst each key audience
- VII. To identify the main drivers for “soft power” amongst each key audience

#### 3.4 Reasons for support for the Russian Administration

- I. To identify key reasons for support for the Russian Administration within supporters from different segments of the population
- II. To understand what can be done by the UK and national Governments to engage and be more attractive than the Russia Administration within specific segments of the population.

#### 3.5 Russian Administration communication methods and messages / narratives communicated

To identify how the Russia Administration communicates with the population and what messaging, narrative is being communicated. For example:

- I. What messaging is the audience exposed to?
- II. How is this information delivered (through what channels)?
- III. How frequently is messaging delivered?
- IV. How is it received by their community?
- V. What impact does this messaging have on the community?

#### 3.6 Government of Country

- I. To understand the level to which their Government (in its present or future form) is trusted to maintain the security and prosperity of the country as a whole and predominantly Russian speaking households
- II. To understand how their current Government is perceived as addressing (in the short, medium and long-term) and providing for the audience's needs (linking to meeting their current and future hopes/dreams/aspirations)
- III. To identify their satisfaction of their Government and its' leadership
- IV. To Identify perceptions of their central government, it's parliament, regional and local political forces, and the trust the audience has in them
- V. To identify any particular issues or policies causing grievances between predominantly Russian speaking households and national Governments
- VI. To identify whether the audience believes that the territorial integrity of their country as it stands, is likely to meet their needs and serve their interests
- VII. To identify if they would prefer their Government to develop better greater relationships with Russia or the West, and why
- VIII. To establish perspectives on Government communications. What they would need to hear from their Government to convince them that being part of Europe and enjoying benefitting from universal values is a better solution' than Russian integration

### 3.7 UK Government and international community

- I. To understand attitudes towards the UK Government and international community
- II. To understand attitudes towards UK Government and international community involvement in their internal affairs
- III. To identify specifically what type of involvement would be preferred and why
- IV. To identify their perception of UK Government and international community involvement in issues directly relating to Russia (locally and globally)
- V. To identify their level of understanding of NATO/EU and their perceptions/attitudes towards them
- VI. To establish whether they perceive as NATO/EU a force for good in the world
- VII. To understand on the issues on which individuals would like to engage the British Government, companies or NGOs on (e.g.investment, English languages training, tourism, education etc)

### 3.8 Media Consumption

- I. To identify the range of media/information channels they consume e.g. the specific TV and radio broadcasters, and publishers of print and online media they use

- II. To understand what forms of media the audience utilises as the perceived trusted delivery channel for information (national and local) and why.
- III. To understand what the relative importance of TV, radio, social media and print is
- IV. To identify what type of content they like consuming and what interests them
- V. To identify what channels are perceived to be credible
- VI. To identify why they find these channels/sources credible
- VII. To establish how they 'measure' the credibility of the information providers.
- VIII. To measure the consumption of each channel to form a baseline against which future efforts will be measured.

The supplier will agree to provide the detailed methodology for each element of research and cross-tabs for each tasking. This will ensure that accurate evaluation analysis can be carried out during future research (not covered under this procurement).

#### Research Scope

The target audiences for the TAA are outlined below.

#### Countries

The TAA should gather representative views of the populations within specific countries as a control group against the representative views of those who speak Russian in a "home setting" within these countries:

- Estonia
- Latvia
- Lithuania

#### Demographic groups

The TAA will capture the following demographic information:

- Gender
- Age
- Ethnic groups
- Social stratifications
- Income
- Employment status/occupation
- Level of education
- Languages spoken
- Location

Bidders are requested to provide recommendations on the most appropriate method for undertaking the social stratification of the populations of interest.

#### **4. Competencies**

The contractor or consortium will be able to demonstrate:

- a) A strong background in audience research;
- b) Working knowledge and proven record of research in the Baltic States and EU Eastern Partnership Countries;
- c) Knowledge of the applicable legal frameworks and regulatory regimes in place for Baltic States and EU Eastern Partnership Countries;
- d) An excellent track record of standardised qualitative and quantitative research across different countries;
- e) Access to a range of existing data;
- f) A credible methodology to develop in-depth comparative research across different countries including appropriate weighting where applicable;
- g) Strong quality control processes;
- h) A credible plan for reporting detailed research to the customer and highlights to senior audiences and HMG's partners;
- i) How they will be able to accurately research pre-dominantly Russian speaking audiences without changing perceptions

The successful contractor will be asked to develop contractual KPIs with the FCO programme team before going to contract. Formal written monthly and quarterly reports on outcomes will be required along with an end of project lessons learnt.

The contractor will demonstrate how the protection of data will be handled including how to keeping data secure and measures to ensure appropriate handling of sensitive data.

Towards the end of the contract, the primary contractor will provide final completion and handover documents (including the final lessons learnt report, details on methodology, sampling and cross-tabs with any recommendations for future work) suitable for a smooth transfer to new contractor should the customer decide to engage one for further programme phases.

#### **6. Dependencies**

The supplier is asked to assume that they will deliver an entirely independent set of services should they win the competition. Items such as office space, translation costs, security, legal fees, insurance, transport and accommodation costs should be included in the pricing model.

The supplier is responsible for due diligence of potential partners and for assessing, reporting on and mitigating all risks at a project level. Risk register to be updated monthly.

#### **7. Reporting and M and E**

The supplier will meet at least monthly with the FCO during the implementation phase. There will be flexibility on the location of these meetings e.g. in London or in-country. For costing purposes, the supplier should include the costs of their representatives attending London based meetings in the pricing model. The project will report to a board consisting of

a representative from the supplier and 4 x representatives from different FCO stakeholders. The supplier will need to report on progress against their project plan, risks and impact.

The supplier will be asked to formally evidence monthly progress and submit financial reporting and monitoring and evaluation reports. Submission of an interim report will be required once the research has taken place, before final report submission. A lessons learnt document will be required at the project end.

## **8. Financial Management and Payments**

The supplier will be reimbursed as per the CSSF Framework contract on a call-down basis following the submission of monthly line by line fee and expense reports.

## **9. Budget**

The FCO is budgeting as below:

Estonia, Latvia and Lithuania TAA (maximum budget £700k)

## **10. Timeframe**

The project is expected to start in January 2017 and be completed by end FY 2016/2017.

## **11. Duty of Care**

**Duty of care and security:** the FCO has no specific knowledge of any direct threat to the implementers of this project. The implementer will hold the duty of care responsibility for its staff and the security of the project; it is to ensure that all reasonable security measures (physical, information and communication) are taken to reduce the threat to as low as is reasonably possible, and to expose any risks that are identified. The project, as with the rest of the FCO's Russian Language Strategic Communication Programme is overt, no attempt should be made to disguise activity. The project board will approve an outline engagement/communication plan for the project.