



scl group

KENYA

Proposal for TNA/Jubilee Alliance

CONFIDENTIAL

RIPON 

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SCL Elections has an unrivalled track record in political campaign management. For over 25 years we have worked on more than 100 campaigns across 5 continents.



SCL Commercial is specialist in providing behavioural research methodology to the commercial worlds of advertising and marketing.



SCL Defence is a leading practitioner in behavioural conflict resolution - Information Operations or PSYOP (psychological warfare).



SCL Social is a behavioural research agency that seeks to replace creativity with science in addressing communication campaigns that really matter.





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SUMMARY

In recent months, Kenya has struggled with security challenges that have shaken the image of the government. Despite bold legislative moves to address these issues and strong action on the part of President Kenyatta, the media continue to express doubts about the efficacy of the government's response and present a picture of widespread fear and vulnerability among the population. With security threats from terrorism and crime continuing to manifest, and political threats from opposition leaders growing, it is more important than ever that the TNA/Jubilee administration is able to engage with Kenyans and communicate the action it is taking to address these threats and improve their lives. The true extent and nature of public sentiment is unclear, however, with media reports ranging from criticism of perceived government inaction on the one hand, to disquiet at what others regard as heavy-handed security measures on the other.

Such dissatisfaction, real or perceived, can be manipulated easily to feed into other streams of political discontent and to erode general support for government policies in key sectors. The capacity and credibility of government is often questioned as a result.

Breaking through the noise, misinformation and fear to reassure the populace that government cares and is meeting the needs of its people is a challenge all administrations facing security challenges must grapple with. To do so effectively, however, the administration must know the extent to which media criticism is genuine and reflective of negative public opinion, and to what extent it is simply a failure of government communication in understanding and responding to people's fears and concerns.

Identifying how ordinary Kenyans across the country really feel about national security and terror threats, and knowing how they want to see government respond to these and other important development issues, is critical if the government is to capture and retain public support behind its actions.

SCL can help you do this.

SCL Group's communications management methodology is unique. Unlike our competitors, SCL services are underpinned by powerful data-driven scientific methodologies. These were developed by the Behavioural Dynamics Institute (BDi), a leading international centre for multidisciplinary research and development in behavioural change, including Target Audience Analysis (TAA), social influence and strategic communications.

The ability to instantly identify your supporters and opponents in the community and then engage them in the most effective way is one of the key challenges political leaders face. Overcoming this challenge requires knowledge of what the population cares about and how they think, an understanding of how to communicate with them, and the infrastructure required to ensure that your messages reach your audience and change their attitudes and behavior. A world leader in developing and implementing influence and voting behavior strategies, SCL Elections knows what it takes to win elections and then how to remain effectively engaged with people to better govern with public support.

SUMMARY

Our staff have worked at all levels of campaign hierarchies and provided actionable solutions and bespoke advice to candidates, parties and governments around the world. Political leaders rely on our research and data-led communications assistance to engage with populations and drive their political and social policy agendas, and SCL has provided governments on five continents with scientific advice on target populations, key messages, and guidance on how to develop their technological and human capacity

Preliminary discussions with the Office of the Presidency of Kenya indicate that SCL would add value and critical support in the following areas:

1. PERCEPTION SURVEY

A nationwide survey will enable SCL to provide TNA/Jubilee with an in-depth understanding of the Kenyan population's attitudes on security, governance and other key topics. Also provided will be a series of strategic communications recommendations, which will help TNA/Jubilee to mitigate negative news coverage and promote positive sentiment amongst the voting population of Kenya.

2. AUDIT OF CENTRAL GOVERNMENT PRESS OFFICE

An effective government Press Office is an essential tool for governments that want to engage with their populations. An evaluation and needs assessment of the Central Government Press Office will allow SCL to take a snapshot of current capacity and provide the government with a roadmap setting out the training, procedural innovation and human resources required to more effectively communicate the government's policies to the Kenyan public. This will ensure that the government is better able to get its message across and positively influence Kenyans' perceptions of its work. This could also act as a platform for government communications to articulate and highlight policy achievements and progress on development goals over the coming two years.

3. STRENGTHENING OF PARTY ORGANISATIONAL INFRASTRUCTURE DOWN TO LOCAL BRANCH LEVEL

Political organisations that want success and longevity in the modern campaign environment must be well-organised and structured in such a way that they are able to coordinate activities at all levels. SCL proposes to undertake a thorough review of the management structure, information systems, human resource capabilities and IT capacity of the TNA/Jubilee Alliance. Our party organisation specialists will conduct a holistic assessment, and will then provide actionable recommendations regarding areas for improvement. Training and organisational learning materials will also be provided, so as to ensure that the party can continue to develop its own capacity going forward. An optional component of this process would be the provision of a membership card scheme and associated database, which will provide the TNA/Jubilee with the capacity to monitor its supporters and better mobilise staff, volunteers and donors when required.

4. POLITICAL ANALYSIS OF FORTHCOMING TANZANIAN ELECTIONS

SCL will undertake a programme of high-level secondary research into the current political dynamics in the Republic of Tanzania, which will form the basis for a report on key figures in the CCM and the opposition coalition (with a focus on Chadema and the CUF), an analysis of their political positions and agendas as they align with or contradict Kenyan and EAC interests, and likely winners in the 2015 general election. SCL can complement this analysis of secondary sources with primary data collection in Tanzania to provide a detailed analysis of likely voter sentiment and electoral scenarios.



COMPONENT 1

PERCEPTION SURVEY

In 2012, SCL undertook the largest programme of political research in Kenya's history in support of the TNA/Jubilee campaign for the Presidency. Two years later, the TNA/Jubilee administration of President Kenyatta is fighting threats from Islamic terrorism, crime and a resurgent political opposition. In such turbulent times with competing domestic and external needs and threats, it is vital that government gain and retain insight into the views of the populace, and acceptance of its actions, if it is to capture and carry popular support.

Such insight cannot be gained from media reviews and reports which can be partial or partisan; a more balanced 'temperature' check is required to truly measure public sentiment and levels of support. Despite taking strong action to combat political and security threats, for example, the TNA government has grappled with managing media coverage and shaping public opinion but remains unclear on how voters really feel about its actions or what they really think of and want from their leaders.

SCL will undertake a nationwide county-level survey of the Kenyan population's attitudes and investigate their views on the government's responses to important issues. Preliminary discussions with the Presidency indicate that the population's opinions on terrorism, crime, energy policies and educational programmes such as electrification and IT provision in primary education are of particular interest. As such, the survey will focus on these topics, as well as investigating the modalities of public communication in Kenya.

This survey will involve teams of SCL field researchers and local partners travelling to each of Kenya's 47 counties to interview a nationwide total of c. 47k respondents. This number will

provide a sample that will be representative at 99% confidence with a confidence interval of 0.6. SCL will also undertake a complementary qualitative research programme that will involve an appropriate mixture of In-Depth Interviews and Focus Groups. This qualitative phase will provide important insights and data that will allow our political communications strategists to contextualise the quantitative survey and draw recommendations from the quantitative data gathered.

Taken together, the qualitative and quantitative research programmes will provide a large dataset that will be analysed using SCL's proprietary methodology to identify target audiences and their views on the TNA/Jubilee government's actions on key issues. Furthermore, this analysis will incorporate data gathered in Kenya by SCL in advance of the 2013 election, which will provide benchmarks and enable a deeper analysis of issues.

SCL's analytical methodology employs a holistic suite of data analysis techniques, applied by our team of statisticians and data analysts. This process has a proven track record of producing topical, useful insights that can shape engagement and communications strategies.

The product of this survey and analysis will be a full report, divided by geographic, ethnic and other factors, that will contain concrete, practical recommendations regarding who to target, what to say to them, and how to say it.

SCL has the experience and local knowledge needed to undertake a survey of this magnitude, as demonstrated clearly in its support for the 2013 election campaign. The recommendations provided by SCL's data scientists and political analysts will furnish the government with the tools and messages it needs to generate positive sentiment amongst key population groups and shape positive public perception over the next two years.



PERCEPTION SURVEY

OBJECTIVE: To provide the TNA/Jubilee with up-to-date insight into attitudes and an actionable communications strategy

- A micro-level survey of 47,000 Kenyan citizens' attitudes and perceptions of key issues and government performance that will be representative of the population according to geography, ethnicity, political affiliation and other factors
- Qualitative research including focus groups and interviews in key areas
- Desk-based research of secondary sources and an examination of SCL's previous research in Kenya will allow our researchers to design a survey and data collection schedule that will ensure predictive validity
- SCL's data scientists and political analysts will use the raw data from the survey and secondary sources to provide clear insights and actionable recommendations that will enable the TNA/Jubilee to communicate more effectively with key population groups and win greater public support

Estimated Cost

\$1,660,430





COMPONENT 2

AUDIT OF CENTRAL GOVERNMENT PRESS OFFICE & COMMUNICATION STRATEGY SUPPORT

Kenya is facing many challenges, from the mounting threat of militant Islam to violent crime, global economic pressures and the enduring challenge of infrastructure development. The government's ability to manage local and international media is a significant factor in shaping public perception of, and support for, the government's responses. The Kenyan government under President Kenyatta's leadership has worked in difficult circumstances to improve living conditions and security, yet this positive news has sometimes failed to reach the right audiences either in Kenya or abroad, and media criticism of the government continues.

With the recent withdrawal of the ICC charges against President Kenyatta, his administration has a unique opportunity to improve levels of public trust amongst the people of Kenya and interested observers elsewhere. To that end, the President and his TNA/Jubilee partners need to ensure that the media operations of their government are efficient, skilled and prepared to engage effectively with local and international media. At present, the efforts of the Central Government Press Office have proven insufficient to consistently and positively portray the Presidency in the face of a hostile media sector, and this hostility is likely to translate into negative public sentiment.

Since 2012 when SCL first designed the TNA/Jubilee brand and established the Alliance's communications infrastructure in preparation for the 2013 election, we have been invested in the success of the Kenyatta administration. We are experienced in building systems and infrastructure for effective press relations management, and we know what is required to turn good press relations into a friendly media, which in turn engenders positive sentiment amongst voters and the population at large.

SCL proposes to use our experience of press relations and knowledge of Kenya to undertake

an evaluation of the Central Government Press Office [GPO]. The study will examine the GPO organisational structure and processes in order to provide a framework for identifying how these elements can be improved so as to more effectively engage with the media and the general public. The evaluation will look at human resources, relationships with local and international media houses, messaging, outreach channels and other human and infrastructural capacities.

This information will be analysed by our media relations specialists, who will in turn use their knowledge of effective press management to provide concrete, actionable recommendations that can make the Government Press Office into a more powerful tool for shaping media reportage and public perceptions. SCL experts will also develop GPO capacity through direct training and support.

Based on the findings of the Audit and the identification of opportunities for promoting a more aggressive and positive communications strategy, SCL experts will work with GPO officers to design a new and more vigorous PR and communications strategy.

Furthermore, we will identify opportunities to vigorously promote the positive achievements of the administration. SCL will work with the GPO to highlight Kenya's reinforced and renewed position in the region and continent as a whole following its defeat of the erroneous ICC charges and its continued political, economic and military prominence in the region.

An efficient Press Office and PR operation will be key to shaping public opinion over the coming years to 2017, and will also prove invaluable as a mechanism for actioning the strategic communications recommendations that result from the national sentiment survey described in the previous section.

AUDIT OF CENTRAL GOVERNMENT PRESS OFFICE & COMMUNICATIONS STRATEGY SUPPORT

OBJECTIVE: To make the Central Government Press Office into an effective tool for shaping media reportage and public perceptions

- Desk Based Research (DBR) - media analysis will identify context and media landscape
- Capacity Assessment - a detailed specification of all existing and required technical, human resources needs in the GPO; skills, training, management system and regulatory requirements
- Organisational Change Management Plan to improve government communications (eg. training programmes, HR processes, management structure, media engagement protocols and strategic considerations). Provision of training sessions and materials, including in-situ support for initial implementation of Change Management Plan.
- Design and initial roll-out of aggressive PR and communications strategy including (as needed) design of press and publicity materials. Cost of producing materials locally will be additional.

Estimated Cost
\$459,937



COMPONENT 3

STRENGTHENING OF PARTY ORGANISATIONAL INFRASTRUCTURE TO LOCAL BRANCH LEVEL

Winning modern elections requires political parties that are capable of mounting complex, coordinated nationwide campaigns. This operational organisation must extend from the highest levels of party leadership to volunteer coordinators in local branches, to ensure that resources are deployed effectively and that talking points are clear and uniform. Achieving this level of organisation requires human resources, information management systems and organisational processes that are capable of facilitating a national effort. It is never too early to begin (re)structuring a party organisation to ensure it is capable of achieving electoral victory.

In advance of the 2013 Kenyan election, SCL devised a research-led campaign strategy and communications plan that led to the creation of the TNA/Jubilee brand. Building on this foundation, it is important that the Party continue to fundamentally strengthen over the coming years to create a solid platform fully prepared to support campaign strategies well in advance of 2017.

Across countries and continents, SCL has extensive experience designing strong frameworks for political organisations, delivering solutions and advice on the recruitment, training and operational processes necessary to achieve electoral success. Our work in the USA, Latin America, Africa and the Caribbean has involved extensive initial planning and reorganisation of political parties, and we have a significant and successful track record of building capacity amongst political organisations.

This process will involve a thorough audit of existing party capacity as a basis for identifying a realistic and strategic plan for building Party capacity to deliver for the future. Our experienced political management specialists will assess existing infrastructure and management processes in a holistic review of human resource needs,

operational procedures requiring improvement, and identification of training or other forms of capacity building that can be provided to staff and volunteers.

The result of this effort will be a comprehensive strategic plan and associated training materials that will enable the party to achieve more effective and organised outreach and engagement with voters, donors, volunteers, party members and staff. If gaps in key positions are identified, SCL will facilitate the recruitment of experienced individuals to fill these vacancies.

A stronger party organisation means stronger messaging to voters, stronger engagement campaigns at election time, and can translate into stronger support from the public. Political organisations capable of mounting nationwide coordinated campaign efforts achieve greater results with less expenditure, and the development of TNA/Jubilee's internal capacity should be a priority in advance of 2017.

MEMBERSHIP CARDS, DATABASE, AND RIPON PLATFORM

A further component of the party organisational restructuring described here would be the provision of a party membership database and associated membership card system, as previously explored in 2012. Being able to instantly engage with supporters, volunteers and donors via a variety of channels (email, telephone, SMS) would give TNA/Jubilee the ability to mobilise supporters at short notice whenever required, and SCL can provide the party with RIPON, our proprietary voter engagement platform to assist management of information and people.

STRENGTHENING OF PARTY ORGANISATIONAL INFRASTRUCTURE

OBJECTIVE: To make the TNA/Jubilee an organisation capable of mounting efficient, powerful national campaigns

- Assessment of current infrastructure and party management processes
- Design of improved party framework, organogram and customised campaign structure
- Operationalising party structure; setting roles and responsibilities, building coherent structure for effective internal and external communications and establishing operating processes that will enable electoral success
- Recruitment of required human resources
- Provision of training and programmes for building capacity

Estimated Cost
\$339,610

DESIGN AND PROVISION OF PARTY MEMBERSHIP CARDS, DATABASE AND RIPON PLATFORM

Estimated Cost
\$182,825

Dependent on Availability of Data; costs to be determined subject to local capacity

COMPONENT 4

POLITICAL ANALYSIS OF FORTHCOMING 2015 TANZANIAN GENERAL ELECTIONS

Kenya's neighbour and EAC partner Tanzania will be holding general elections in 2015, and the outcome of these is likely to have a significant impact on the Kenyan government's ability to achieve its regional agenda.

SCL will undertake a programme of high-level secondary research into the current political dynamics in the Republic of Tanzania, which will form the basis for a report on key figures in the CCM and the opposition coalition (with a focus on Chadema and the CUF), an analysis of their political positions and agendas as they align with or contradict Kenyan and EAC interests, and likely winners in the 2015 general election.

SCL will complement this analysis of secondary sources with primary data collection and a 'deeper dive' into Tanzanian voters' perceptions and likely actions, and present the findings in a limited political and voter sentiment survey.

The survey will follow the general research parameters of the proposed Kenya sentiment survey to ensure validity and robustness of results. This survey will involve teams of SCL field researchers and local partners travelling to each of Tanzania's 30 regions to interview a nationwide total of c. 30k respondents. This number will provide a sample that will be representative at 99% confidence with a confidence interval of 0.6. SCL will also undertake a complementary qualitative research programme that will involve an appropriate mixture of In-Depth Interviews and Focus Groups. This qualitative phase will provide important insights and data that will allow our political communications strategists to contextualise the quantitative survey and draw recommendations from the quantitative data gathered.

This deeper dive will ensure an accurate picture of national sentiment towards the available crop of political leaders and their agendas, and indicate more reliably the likelihood of victory for each of the main contenders, and what that could mean for Kenyan and TNA/Jubilee agendas and aspirations in the region. This will allow the Kenyan administration to better develop an appropriate programme of interaction with Tanzanian stakeholders.



TANZANIAN ELECTION ANALYSIS

OBJECTIVE: To provide the Kenyan government with an understanding of the major players and likely outcomes of the 2015 Tanzanian Election as it relates to Kenya's interests

- High level academic research and analysis of political and electoral scenarios and competing political agendas

High Level Analysis - Estimated Cost

\$19,862

- A micro-level survey of 30,000 Tanzanian citizens' attitudes and perceptions on key issues and government performance that will be representative of the population according to geography, ethnicity, political affiliation and other factors
- Qualitative research including focus groups and interviews in key areas
- SCL's data scientists and political analysts will use the raw data from the survey and secondary sources to provide clear insights that will enable the TNA/Jubilee to identify engagement strategies with specific Tanzanian stakeholders to complement and support TNA/Jubilee regional policies and aspirations

Deeper Dive National Sentiment Survey - Estimated Cost

\$1,238,137



APPENDIX A CORE PROJECT TEAM

Alexander Nix - Managing Director

Alexander Nix was educated at Eton College and Manchester University. Over the past 9 years Alexander has worked on more than 40 communication and research projects in the US, Caribbean, South America, Europe, Africa and Asia. He began his career as a financial analyst with Baring Securities in Mexico, thereafter moving to Argentina where he was co-founding partner of a telephony outsourcing business.

In 2001 he returned to the UK to work for Robert Fraser & Partners LLP and then Robert Fraser Corporate Finance where, as an Assistant Director, he worked as principal and in an advisory capacity on UK M&A and transaction work. In 2003 Alexander left finance to join the SCL Group as a Director. In 2007 he directed his efforts to developing the social and governance divisions, including opening new offices in Washington DC and Delhi and growing the global staff to over 300 employees.

Sabhita Raju - Director of Operations

Sabhita holds an Mphil in Sociology and Politics from Cambridge University and a BA Hons degree in International Relations from Keele University. She has an extensive professional record, having worked in various locations throughout Africa, Asia, the Caribbean and the Pacific over the course of her career. Prior to joining SCL, Sabhita was the Humanitarian Affairs Advisor for Medecins Sans Frontieres (Spain) for East Africa and the Horn of Africa, focusing on negotiations with assertive states, and previously lead a multi-million dollar governance programme for Somalia with the International Peace Building Alliance.

Before this she spent thirteen years at the Commonwealth Secretariat, rising to lead the Secretary-General's Good Offices programme, and was responsible for developing and coordinating the implementation of conflict negotiations in a number of Commonwealth countries. As Director of Operations at SCL, Sabhita is charged with managing large-scale projects and the co-ordination of various geographically disparate teams.

Kieran Ward - Senior Communications Director

Kieran started his career as a graphic designer at some of the most prestigious agencies in the UK including McCann Erickson, Publicis, Leagas Delaney and DHM, where he was Head of Design and Production. He is skilled and experienced in all areas of graphic design, from designing websites to printed brochures, brand identities to advertising campaigns. He has worked as head designer on global and award-winning campaigns for luxury phone brand Vertu, Whisky brand The Macallan and the Economist.

Since joining SCL, Kieran has matched his skills in developing creative strategies for many successful elections with logistical oversight of research projects across Africa, the Caribbean, Latin America, Eastern Europe and the Middle East. He is passionate about marrying creativity, project management and technical understanding to deliver outstanding results.

APPENDIX A CORE PROJECT TEAM

Dr. Zsolt Kiss - Research Director

Zsolt is a political psychologist and an expert in social research. He specialises in the psychology of communication and has carried out extensive research on the induction of emotions and the effects of emotional appeals in community-based campaigns.

Zsolt is an expert in quantitative and qualitative research methodology, having managed numerous research projects. He was conferred a PhD in Politics from the University of Oxford where he was also employed as a researcher. He also holds MA degrees in Research Design and Data Analysis in Social Sciences. Prior to his work with SCL, he held positions with TNS, Bain & Co. and the UK's National Centre for Social Research. He has also acted as communications manager and consultant for several campaigns in Eastern Europe.

Dr. Alexander Tayler - Chief Data Scientist

Alexander Tayler is a Chief Data Scientist at SCL Elections. His primary focus is the development and implementation of models that combine theoretical psychology with big data analytics to enable highly accurate predictions of human behaviour. He is also responsible for the validation of these models and visualisation of model results. He holds a Ph.D. from Trinity College, Cambridge, and a BE from the University of Newcastle, Australia. He has significant experience in the commodities sector, having previously worked for both Schlumberger and Orica Mining Services.

Sam Patten – Political Campaign and Communications Consultant

Sam Patten is a senior-level communications, public affairs and political professional who has managed, directed and spearheaded projects that instigate change in nearly a dozen countries around the world. Patten's international work most recently included the 2014 parliamentary elections in Iraq, where he counseled the largely Sunni party of a deputy prime minister. Previously, he played a critical role in the 2012 election of the opposition to government in the former Soviet Republic of Georgia.

In U.S. political and governmental roles, Patten has worked to elect candidates and to serve those advocating moderate, common sense solutions. Patten was appointed by former President George W. Bush to serve an advisor at the State Department in 2008, and served two senators from Maine as a speechwriter and legislative aide. By combining best practices from the United States with those from emerging countries across the globe, Patten offers his clients a seasoned, balanced and creative perspective for identifying options and tackling the challenges of the moment.



APPENDIX B CASE STUDIES

Ghana, 2013-2014

SCL is currently in the process of completing the final stages of a major project in Ghana centered around the collection, analysis and visualization of social, demographic, economic and public health data.

This project involved one of the largest quantitative and qualitative surveys ever undertaken in West Africa, and over 40,000 individuals were interviewed across Ghana's regions regarding their attitudes on government-provided healthcare and other issues. The data collected was analysed by SCL and BDI data scientists to create a bespoke interactive database listing individuals across the country and their views on the government's performance. A key part of this database is its visualisation capacity, which will allow Ministers and government staff to view and interact with the data in an innovative, dynamic format using maps, graphics and other visual media.

The visualisation database and dashboard will feature community and individual level information across the ten regions of Ghana. The visualisation platform combines this data in a flexible fashion that can be augmented over time as further information becomes available. Ultimately the purpose of the project has been to provide a system via which Ghanaian officials can examine data relating to the population from the micro to the macro level, and on this basis improve policy planning and implementation.

Trinidad & Tobago, 2010-2014

With a decade of economic growth beginning to falter and a crime rate deteriorating each year, Trinidad & Tobago faced a crucial election in 2010. In this context SCL was contracted by a major political party to develop a suite of messaging tools for its electoral campaign. Deploying to the field several months prior to the election, SCL began a systematic capacity-building effort that improved the party's ability to effectively fight its campaign.

The early assistance of SCL allowed the party leadership to implement a number of new organisational strategies in time for them to become institutionally embedded and thus impact the electoral outcome. In combination with the messaging advice and content provided by SCL consultants based both in Trinidad and the UK, the client managed to retain a significant number of seats in the general election, and indeed in some more closely fought constituencies they were successful in taking seats from the opposition.

SCL expanded upon its work in Trinidad & Tobago with the construction of a bespoke voter database in the period following the election. Utilising a mixture of proprietary and public resources SCL created a flexible and evolving system; one that will act as a focal point for client engagement and messaging efforts over the coming years. In essence this was a natural progression from the 2010 ballot, wherein the client's data infrastructure and analytical abilities were still emergent. For Trinidad's upcoming election in 2015, a systematic and unparalleled set of records will be available to the party describing in detail the demographic, economic and social make up of the electorate. When combined with psychological analysis, it is envisaged that these records will provide a significant advantage in the execution of the communications strategy devised by SCL.



APPENDIX B CASE STUDIES

USA Midterms, 2014

In 2014, SCL undertook a massive operation in support of candidates and advocacy campaigns in several US states during the election season. Using our proprietary 'big data' behavioural analytics and extensive political campaign experience, SCL provided data on target voters, messaging and creative solutions to candidates and campaigns, and local staff used our RIPON platform to contact several million voters.

SCL also used its digital microtargeting capacity to support online advertising campaigns by several advocacy campaigns supporting candidates and/or issues, which collectively reached millions of American voters via targeted TV and online advertising that was tailored to their specific political and psychological profiles.

When election day came on the 4th of November, candidates supported by SCL were successful taking seats across the country, and SCL was credited with providing the impetus for victories at both state and federal levels.

Italy 2012

In 2012 SCL carried out a research and analysis project on behalf of a resurgent Italian political party last successful in the 1980s. Using a mixture of internal party auditing and Target Audience Analysis, SCL researched current and past members along with potential sympathisers to develop a reorganisation strategy that catered to the needs of both contingents.

Inside the party, SCL undertook a series of examinations to help the client understand which of its procedures were effective and which required reform. Beyond the party, SCL was able to identify unrecognised categories of voter via the TAA methodology that would find the client's platform appealing. By bringing these internal and external strands of research together, SCL was able to provide specific recommendations on a new organisational structure based on flexibility and a desire to improve the party's abilities. SCL's reorganisation programme allowed the party to perform well beyond its initial expectations at a time of much turbulence in Italian politics. The revival of the party in the unsettled climate of Italy's contemporary political context was premised on the insights and practical advice provided by SCL.



APPENDIX C REFERENCES

UK Foreign and Commonwealth Office, Sarah Ann Connolly Counter-Terrorism Prevention Unit

"In October 2008 the FCO appointed SCL Social to do a behavioral study in Pakistan to aid the FCO in strategic planning to counter violent jihadism. This six-month target audience analysis produced a series of strategic and operational recommendations for behavioral change communication and any future public awareness campaign strategies designed to tackle violent Jihadism.

I found the SCL Social team to be consummate professionals, providing in-depth and accurate information and unique solutions to complex problems. SCL Social were a joy to work with. In a difficult operating environment they were the only contractor to deliver actionable recommendations, which impacted on policy in the near term and the FCO's strategic direction in country. I wouldn't only recommend them, I'd work with them again in an instant."

Government of St. Kitts and Nevis, Hon. Dr. Denzil Llewellyn Douglas Prime Minister

"From devising the overall campaign strategy, to creating and implementing each and every campaign component, SCL Social provided the platform to effectively communicate with the people of St. Kitts and Nevis about their Government's record of delivery, while raising awareness to the important issue of crime."

Herman Cain Republican Presidential candidate 2012

"As a former candidate for President of the United States in the 2012 election cycle, I can emphatically state that Republican candidates will continue to be at a disadvantage until the full capabilities of 'behavioural modeling and big data' are an integral part of a winning campaign strategy. I also believe we may have been able to win the past election had we been properly implementing the processes used by our opposition in these areas.

I have been briefed on the SCL Group's deliverables for the 2014 election cycle, with full implementation for 2016 and beyond. It is my firm opinion that if not implemented, we risk never being competitive and will forever lose the opportunity to win on a broad scale or to even compete on an even playing field."



APPENDIX D SURVEY METHODOLOGY

As outlined in the preceding sections, SCL will undertake a comprehensive programme of behavioural research that will generate insight and county-level recommendations regarding public perception of the security situation and the efficacy of the government's response, perceptions of the efficacy of government policies on health, energy and education, and other information regarding social networks and channels of mass communication.

Phase 1 – Review of Existing Sources & Conceptual Design

The first phase will be Desk-Based Research in the UK and Kenya, which will involve reviewing available secondary sources and carrying out consultations with subject matter experts. This will enable SCL to identify available demographic and other data (useful when defining sample frames), and will also allow SCL to structure the questionnaire to be deployed during the pilot research phase.

The key outputs from this initial stage will be a body of secondary data that will inform the design of the project, as well as a detailed list of the specific issues that must be investigated over the course of the project's life.

SCL commits to consult on the development of the project timeline and to agreeing milestones to ensure that objectives are met in a timely manner. This will allow the identification of any risk factors threatening timeliness at the earliest possible stage.

Phase 2 – Field Research Design

Following the completion of Phase 1, SCL will begin collaborating with a local Kenyan partner organization to develop detailed itineraries for a county-by-county qualitative and quantitative research programme. Also included in the formulation of this research programme will be any specific requirements suggested by the client, including potential focus on particular ethnic groups, geographic areas or subject matter.

Based on the results of Phase 1 and local knowledge, the London-based Research Team will work concurrently with the BDi to define the parameters of the project and select the most appropriate suite of flexible, multi-method field research methodologies. They will design a research programme that utilises the statistical techniques and psychosocial research parameters likely to provide the greatest insight.

Using these research methodologies, SCL be able to provide a complete picture of public perceptions, as well as recommendations regarding how these can be shifted via strategic communications.

Phase 3 – Field Research

SCL Social will establish in-country branches of expatriate and local researchers, analysts and project managers. Each location will be staffed with a mix of locals and expat managers. The number of staff required to conduct data collection and analysis will depend on the selection of locations, though generally a project of this size requires approximately 8-10 core staff in London in addition to deployed field teams.

APPENDIX D SURVEY METHODOLOGY

The research programme will take the form of a large-n quantitative survey, conducted via face-to-face interactions with respondents. SCL will also undertake qualitative data gathering efforts including social network surveys, focus groups and one-to-one in-depth interviews:

- The survey instruments will be piloted by conducting interviews with targeted respondents over 1-3 days, and refined as necessary;
- All survey interviews will be guided. Respondents to any survey instrument will not be the same as those for any in-depth interview;
- Field Research team members will be responsible for their own data entry and will do this on a daily or 2-day basis. The fieldwork supervisor will oversee data entry and ensure that sorting and cleaning protocols exist to maintain the highest possible level of dataset quality;
- Responses will be recorded into an electronic database, allowing for statistical analysis and visual presentation of research conclusions.

Members of each team will share their cultural and socioeconomic background with the target location(s) allocated to them. This will ensure efficiency, relevancy, and security through local knowledge of the research environment.

Researchers will have prior experience of conducting research; however, specific SCL training sessions will be held, as SCL's methodology requires attention to detail to ensure that the data collected is reliable. Research instruments will be translated into the language and dialect most widely understood and accepted by target groups and/or relevant sub-groups. All research will be presented as an academic research study and all researchers will carry identity cards.

SCL will separately recruit and capacitate an independent Quality Check team that will monitor data collection, and ensure that quality assurance procedures are followed.

Each researcher will complete their interviews through a smart phone or tablet application that both uploads the data and marks their location by Global Positioning System (GPS). The use of smart phones and tablets with trackable GPS systems will provide invaluable quality control measures, and also allows research conclusions to be geographically divided.

The overall project will be overseen by the Project Managers – SCL employees from the UK with extensive experience of project management in Sub-Saharan Africa. Project Managers will be responsible and accountable for quality control and adherence to budgetary and other constraints on activities and deliverables.

In addition, BDi scientists will design controlled and randomised experiments to test the effectiveness of sample messages and initiatives amongst the population. The ultimate aim is to test their effectiveness and define a communications strategy for our client.

Phase 4 - Analysis & Recommendations

Target Audience Analysis (TAA) forms the central element of this phase. By compiling all the data collected and subjecting it to an array of analysis methodologies SCL be able to provide a complete picture of public perceptions, as well as recommendations regarding how these can be shifted via strategic communications.

Deliverables

The principal deliverable for this project will be a comprehensive research report, made available in electronic version, and prepared in English following the guidelines provided by our client.

A secondary deliverable will be a PowerPoint presentation summarising the main findings of the research, as well as the prescribed communications strategies.

APPENDIX E RIPON

RIPON

ONE INTEGRATED CAMPAIGN TOOL



RIPON: THE FUTURE OF CAMPAIGNING >

An innovative voter engagement and campaign management tool for your team to control all aspects of the modern campaign space. Our multi-platform software provides a unified solution that allows clients to position and manage their candidates, advocacy campaigns, volunteers or party membership more efficiently and more effectively.

With in-depth voter/supporter data and community profiles available at the touch of a screen, powerful voter or volunteer/party member engagement and fund raising strategies can be executed with complete synergy. A revolutionary, easy to use and interactive product, Ripon allows for targeted supporter mobilisation combined with real-time oversight from Campaign HQs. This tool can be customised to manage the specific information and supporter information required by TNA/Jubilee for both party organisational needs, or electoral campaign implementation.

The Ripon tool is optimized to work across all platforms from PCs and Laptops, to tablets and smart phones. Its constant multi-platform connectivity ensures that managers always have access to core system features such as: Get Out The Vote, Behavioral Microtargeting™, Bulk SMS and Canvassing. Ripon's suite of features also permits managers to control other campaign activities such as artwork, query building and scheduling, meaning that whether a key element or minor component, every aspect of the campaign can be optimised and perfected.

STRATEGY FEATURES



ENHANCED VOTERFILE: Electoral Roll for your region that has been rigorously cleaned, updated, and enhanced with additional contact and political data.



PSYCHOGRAPHIC PROFILING AND DIAGNOSTICS: Delve well beyond standard political messaging to understand the underlying psychological motivators of voting for each target segment.



BEHAVIORAL MICROTARGETING™ | VOTERFILE SCORES: Accurate behavioral and political scores for every single voter based on advanced statistical modeling techniques.



PRETESTED MESSAGING: Preloaded arsenal of highly refined and scientifically tested messaging content optimized for each target voter category.



APPLIED INTERVENTION STRATEGIES: Easy to understand documentation on voter behavior research with clear and actionable recommendations on how best to engage with different types of voters.



CAMPAIGN ARTWORK: Use pretested artwork designed for each voter segment so that every campaign communication uses high-impact visuals with ad agency quality.



ONBOARDING NEW CAMPAIGNS: Help campaigns embed the engagement tool into their campaign and help complete data mapping for their tags and groups to meet individual campaign needs.



CAMPAIGN DATA IMPORT: Work with campaigns to help gather existing data, normalize it, and import it into their new system.

MANAGEMENT FEATURES



TURF CUTTING / CANVASSING: Narrow down your targeted lists to specific neighborhoods, walkroutes, and streets for optimal canvassing. Add instructions for canvassers and print paper walkroutes and lists, or send to the SCL canvassing app.



ONLINE MARKETING/ADS: Create and optimize online advertising through banners, Google, Facebook, apps, and other websites.



MESSAGE MANAGEMENT AND WORKFLOW: Have suggested messages arrive at the campaign office for approval and sending after a central campaign review process.



SCHEDULING: Campaign scheduling tool with shared calendar and calendar/email integrations with formatted messages.



MANAGE MY TEAM: View your campaign team with a full hierarchy. See team and individual performance, adjust volunteer and user permissions, send e-mails and SMS (text) messages to volunteers, and see full metrics on their performance.



GAMIFICATION: Built in reward structures designed to create a meritocratic campaign and encourage volunteers to go the extra mile.



QUERY BUILDER: Build and run custom queries and searches. Save them for later or share with others.



GROUPS AND TAGS: Build static and dynamic lists to assign or tag electors; or for use in canvassing, emailing and phone banking.

ENGAGEMENT FEATURES

Features require additional tailoring to fit individual campaigns



PHONE BANKING: Create and schedule volunteer phone banks, choose phone bank volunteers, and assign target groups/locations.



AUTOMATED CALLING: Create automated phone calls with interactive voice response technology to allow for mass telephone messaging and surveys.



DIRECT MAIL: Create bulk mailings and prepare them for printing locally in office, through a local provider or through a trusted national bulk mail partner.



BULK E-MAIL: Create individual or bulk email based on targeted groups. Send email through trusted national partners for optimal penetration and worry-free sending.



BULK SMS (TEXTING): Send single or mass SMS messages to target individual voters or groups of voters.



GET OUT THE VOTE: GOTV live performance metrics, real-time analytics, and visualization. Create campaign bus pickup lists, schedule reminder phone calls, mark off voters that have voted, and message through email, SMS, and social media.



SOCIAL BLASTS: Connect to Facebook, Twitter, and LinkedIn to post campaign messages through supporters and volunteers.

WHAT MAKES SCL DIFFERENT?

Ten years ago, traditional microtargeting swept onto the political scene and changed the game of our elections forever. A decade later on, staring at people's demographic traits, their ethnicity, gender or age, tells you remarkably little about most individuals' likely voting behavior. That's because behavior isn't about what people look like, but about how they think. That's why SCL has harnessed cutting-edge developments in technology, data and psychology to develop Behavioral Microtargeting™: the political game-changer for the decade to come.

DATA

	Other Leading US Data/CRM Providers	scl elections
Most recent voter files for each state, county, or other voting district supplied by official electoral bodies utilized as the foundation of individual voter records in the Database of Records (DBOR).	✓	✓
Datasets with individual voting history, exit polls, and other commercial information collated and consolidated.	✓	✓
Demographic, consumer, lifestyle, and behavioral data of your target groups collated and consolidated.	✓	✓
In-house processing of data to universal standards for easy use, record matching and application.	✓	✓
Accuracy of basic voter record ensured by cross-referencing against multiple data sources.	✗	✓
Accuracy of complex and nuanced voter profiles and individual information ensured by cross-referencing against multiple data sources.	✗	✓
Sophisticated statistical techniques applied to ensure centralized integration of vast amounts of data from multiple sources.	✗	✓

TECHNOLOGY

Database of Record (DBOR) where data is stored and referenced against Voter Files to create a simplified view of all data.	✓	✓
Custom technology for data storage and modeling for analysis of target populations.	✗	✓
Datasets stored on encrypted servers in a physically secure environment.	✓	✓
Infrastructure tested to guarantee capacity to meet high usage peaks leading up to Election Day in all target states.	✗	✓
Work alongside Campaign Managers for effective use of messaging and analysis.	✗	✓

DIGITAL

Voter targeting platform that allows campaigns to:		
(a) Get voter data from any location	✓	✓
(b) See visual representations of predicted voter behavior	✓	✓
(c) Generate target voter lists based on partisanship, likelihood of voting, political issues, demographics and/or psychographics	✗	✓
(d) Use targeting to optimize direct voter contact through door canvassing, tele-canvassing, direct and electronic mail	✗	✓
(e) Give campaign tasks to candidates, staff, and volunteers	✗	✓
(f) Track progress against campaign benchmarks and KPIs	✗	✓
(g) Use simple data entry tools for any paper-based canvass sheets	✓	✓
(h) Upload legacy data or new canvass data into the DBOR	✓	✓
Utilize vast amounts of social media data and overlay with voting records in the DBOR to enrich individual voter files.	✗	✓
Use online user data to optimize online advertising, PPC, and SEO and improve voter targeting.	✗	✓

ANALYTICS

	Other Leading US Data/CRM Providers	scl elections
Planning, design and execution of a multi-channel super sample within each target state.	✗	✓
Customized CA proprietary algorithms to model behavioral constructs within target populations.	✗	✓
Comprehensive quality assurance controls to verify sampling, data, and models.	✗	✓
Rigorous message testing within target audiences.	✗	✓
Scores on voter persuasion and GOTV on specific voter records for optimal campaign efficiency and voter targeting.	✗	✓

QUALITATIVE FIELD RESEARCH

Conducting audience-specific focus groups and in-depth interviews in every target state to:		
(a) Capture a wide array of voter narratives, experiences and attitudes	✗	✓
(b) Extract insight into local political nuances not otherwise discoverable by statistical means	✗	✓
(c) Explore the effect of group dynamics on responses to political stimuli	✗	✓
(d) Develop a list of possible key political issues to test for quantitative modeling	✗	✓
(e) Apply robust questioning to identify possible explanations of statistical trends	✗	✓
(f) Generate nuanced and locally-relevant messaging concepts for large-scale quantitative testing	✗	✓
Application of observational, sociographic, and ethnographic research techniques to log and better understand the daily lives, habits, environments, and customs of target voter groups.	✗	✓
Conduct interviews with subject matter experts and local stakeholders to better understand local politics.	✗	✓

BEHAVIORAL & PSYCHOLOGICAL DESIGN

Peer-reviewed literature in relevant fields, including social psychology, political science and data science used to shape cutting edge thinking and development of psychometric profiling of target voters.	✗	✓
Research methods designed to conform to the latest and highest standards in the respective academic fields.	✗	✓
Custom psychometric inventories developed to identify key behavioral drivers in target populations.	✗	✓
Targeted behavioral outcomes tested rigorously to ensure accuracy of profiling.	✗	✓
Application of psychographic profiles developed from data analysis to target groups of voters.	✗	✓

MESSAGING & CREATIVE

Message concepts for target audiences developed and shaped by data analysis and psychographic profiles.	✗	✓
Creative concepts for various media outlets developed and shaped by data analysis and psychographic profiles.	✗	✓
Scripting for direct voter contact programs developed and shaped by data analysis and psychographic profiles.	✗	✓
Direct-to-voter messaging prepared using unique codes for each psychographic group.	✗	✓

CAMPAIGN ADOPTION, TRAINING & ONBOARDING

Messaging, creative concepts, and scripts field tested rigorously to demonstrate its effectiveness.	✗	✓
Pool of dedicated behavioral, messaging, and political strategy specialists available to campaigns, providing direct support on SCL products and services.	✗	✓
Work closely with the existing campaign to identify support needs.	✗	✓
Simple design in all products for ease-of-use including: data visualizations, mobile applications and targeting platforms.	✓	✓
Provision of training on SCL products and services, including training on voter file administration, targeting strategy, psychographics, and research-supported political tactics.	✗	✓
Integration into the platform of field test results and canvassing feedback to ensure greater efficiency and accuracy in the communication of key messages.	✗	✓

APPENDIX F INDICATIVE BUDGETS

KENYA - TNA/JUBILEE						
Component		Unit Cost	Number of Units	Occurrence	Days In-Country	Cost
Nationwide Sentiment Survey						
Nationwide Sentiment Survey						
	Project Director	\$ 1,461.25	1	5	4	\$ 8,506.25
	Project Manager	\$ 1,225.00	4	65	45	\$ 332,000.00
	Quantitive Analysis Specialist (inclusive of research design)	\$ 1,312.50	2	45	45	\$ 131,625.00
	Survey Cost	\$ 12.00	47,000	1	0	\$ 564,000.00
	Desk-based Researcher	\$ 603.75	3	40	0	\$ 72,450.00
	Qualitative Analyst (inclusive of research design)	\$ 1,312.50	3	35	0	\$ 137,812.50
	Political Messaging Specialist	\$ 1,312.50	1	10	0	\$ 13,125.00
	Creative Director	\$ 1,312.50	1	10	0	\$ 13,125.00
	Quantitative Analyst	\$ 1,312.50	3	35	0	\$ 137,812.50
	Survey Translation Services	\$ 0.53	47,000	2	0	\$ 49,350.00
	In-Depth Interviews (including vox pops)**	\$ 87.50	150	1	0	\$ 13,125.00
	Focus Groups Discussions**	\$ 1,200.00	50	1	0	\$ 60,000.00
	Database License and Architecture	\$ 60,000.00	1	1	0	\$ 60,000.00
	Programme Costs*	\$ 3,750.00	18	1	0	\$ 67,500.00
	Sub-Total				\$	1,660,431.25
	*Including travel documents, airline fares and insurance					
	**Exact number and geographical determination to be agreed					
Audit of Central Government Press Office & Communications Strategy Support						
DBR, Capacity Assessment, Needs Assessment, Change Management Plan						
	Project Director	\$ 1,461.25	1	15	8	\$ 24,318.75
	Communications Strategist	\$ 1,312.50	1	55	40	\$ 84,187.50
	Media Consultant	\$ 1,312.50	2	55	40	\$ 156,375.00
	Political Campaign Expert	\$ 1,312.50	1	30	20	\$ 45,375.00
	Desk-based Researcher	\$ 603.75	2	40	0	\$ 48,300.00
	Project Assistant	\$ 603.75	1	55	45	\$ 46,706.25
	Graphic Designer**	\$ 822.50	2	15	0	\$ 24,675.00
	Miscellaneous Costs*	\$ 3,750.00	8	1	0	\$ 30,000.00
	Sub-Total				\$	459,937.50
	*Including travel documents, airline fares and insurance					
	** Costs of local materials production additional					
Party Organizational Infrastructure						
Party Organisation, Recruiting, Training, Operationalising Party Structure (Campaign HQ would have to be priced separately so not included here)						
	Project Director	\$ 1,461.25	1	2	1	\$ 3,222.50
	Project Manager	\$ 1,225.00	1	35	30	\$ 51,875.00
	Political Campaign Consultant	\$ 1,312.50	2	35	30	\$ 100,875.00
	Organizational Expert (infrastructure, training)	\$ 1,312.50	1	35	30	\$ 54,937.50
	HR consultant	\$ 1,312.50	1	35	30	\$ 54,937.50
	Project Assistant	\$ 603.75	2	35	30	\$ 51,262.50
	Programme Costs*	\$ 3,750.00	6	1	0	\$ 22,500.00
	Sub-Total				\$	339,610.00
	*Including travel documents, local airline and other transport costs and insurance					

APPENDIX F INDICATIVE BUDGETS

TNA/ Jubilee Alliance Supporter Database & Party Membership Cards							
<i>Development of Supporter Database, Creating Party Membership ID Cards, Gamification</i>							
Acquisition of Voter Information (costs will depend on data readily available)							-
Cost of the server to store the database and support for 20 million voters will depend on whether it is stored at SCL (at a \$5,000 a month) or at the Client's server*						\$	30,000.00
Project Director (Strategist)	\$	1,461.25	1	10	3	\$	15,512.50
Project Manager	\$	1,225.00	1	10	5	\$	13,750.00
Data Scientist (creating TNA/ Jubilee Alliance membership database infrastructure architecture)	\$	822.50	1	25	10	\$	23,562.50
Data Analyst	\$	1,312.50	1	25	0	\$	32,812.50
Senior Designer (online interface, card design and functionality, gamification)	\$	962.50	1	25	0	\$	24,062.50
Designer	\$	875.00	1	15	0	\$	13,125.00
TNA/ Jubilee Alliance Supporter Database Infrastructure design	\$	30,000.00	1	1	0	\$	30,000.00
Producing cards (will depend on number of members, card quality & will have to be priced separately)				1	0	\$	-
Sub-Total						\$	182,825.00
* Covers first 6 months cloud cluster hosting costs. Thereafter cost to be borne by client							
Report on Political Situation in Tanzania							
<i>Additional Primary Research in Tanzania Can Be Costed On Request</i>							
Senior Political Researcher	\$	1,461.25	1	10	0	\$	14,612.50
Research Assistant	\$	525.00	1	10	0	\$	5,250.00
Sub-Total						\$	19,862.50
Tanzania Nationwide Sentiment Survey							
<i>Nationwide Sentiment Survey</i>							
Project Director	\$	1,461.25	1	5	4	\$	8,506.25
Project Manager	\$	1,225.00	3	45	30	\$	174,375.00
Quantitative Analysis Specialist (inclusive of research design)	\$	1,312.50	2	45	30	\$	127,125.00
Survey Cost	\$	12.00	30,000	1	0	\$	360,000.00
Desk-based Researcher	\$	603.75	3	45	0	\$	81,506.25
Qualitative Analyst (inclusive of research design)	\$	1,312.50	3	30	0	\$	118,125.00
Political Messaging Specialist	\$	1,312.50	1	10	0	\$	13,125.00
Creative Director	\$	1,312.50	1	10	0	\$	13,125.00
Quantitative Analyst	\$	1,312.50	3	35	0	\$	137,812.50
Survey Translation Services	\$	0.53	30,000	2	0	\$	31,500.00
In-Depth Interviews (including vox pops)**	\$	87.50	125	1	0	\$	10,937.50
Focus Groups Discussions**	\$	1,200.00	35	1	0	\$	42,000.00
Database License and Architecture	\$	60,000.00	1	1	0	\$	60,000.00
Programme Costs*	\$	3,750.00	16	1	0	\$	60,000.00
Sub-Total						\$	1,238,137.50
Programme Support & Logistics							
<i>Office Establishment and Local Logistical Costs</i>							
Office Space, Supplies, AV & Telecommunications, and Logistics	\$	600.00	1	1	120	\$	36,600.00
Local Printing	\$	6,125.00	1	1	1	\$	6,125.00
Sub-Total						\$	42,725.00

Total \$ 3,943,528.75



Thank you for taking the time to read this paper.

SCL would be pleased to meet to discuss further how the practices outlined in this document can be implemented.

Yours sincerely,

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