



scl commercial



Enhancing the Strategic Communication Capacity of PETRONAS

Targeted Community Engagement: A Data Driven Solution



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1. *Executive Summary*

SCL Group has been a trusted advisor to governments, international organisations, multinational companies and political parties worldwide for over 20 years. Building on this bedrock of experience, SCL will take a holistic approach to achieving the most comprehensive, effective and timely solution to the challenges currently faced by PETRONAS in the states of Sabah and Sarawak. PETRONAS' status as the national oil company of Malaysia meant that over the last four decades public perceptions of both the company and the Government of Malaysia (GOM) have gradually become intertwined. This duplexity in the popular mindset strongly influences public perceptions of PETRONAS so the context in which the company operates has to be carefully considered.

Although the current challenges faced by PETRONAS in Sabah and Sarawak should not be downplayed, the relationship between PETRONAS and the population of the two states should also be viewed as an opportunity. By harnessing cutting edge research methods and communication tools now, PETRONAS will rapidly gain unparalleled insight into the perceptions and behaviour of the population within these key states and can look forward to more effective and targeted stakeholder management and community engagement in a relatively short period of time.

SCL is in a unique position to provide PETRONAS with the knowledge to design and implement the most effective communication campaign. SCL has distinguished itself from the competition through a combination of:

- Its experience in designing and applying data driven behavioural methodologies.
- Its ownership of and skill in delivering bespoke Information Communications Technology (ICT) programs aimed at ensuring the accessibility of data and research findings, ones designed to catalyse achievable clear and measurable change.
- An extensive track record of planning and implementing research projects in a broad range of politically, socially and economically challenging environments. (See Appendices C & D)

SCL will enhance PETRONAS' strategic communication capacity by providing a comprehensive array of services and products. A team of experts and professionals with diverse backgrounds and extensive experience will:

- Design, test and implement a large-scale, data driven research project, comprising scientific tools and disciplines, to map the perceptions of PETRONAS amongst the population of Sabah and Sarawak.
- Employ predictive analytics to integrate, analyse and model vast datasets to effectively depict the behavioural and attitudinal characteristics of the target audience at the community level. (See Appendix G for further information on SCL methodologies.)
- Formulate strategic recommendations to enhance PETRONAS' communications capacity in line with the findings that SCL's research and analysis will provide.

- Deliver a bespoke digital platform and dashboard that will incorporate these findings and provide PETRONAS with on-going access to user-friendly data visualisation.

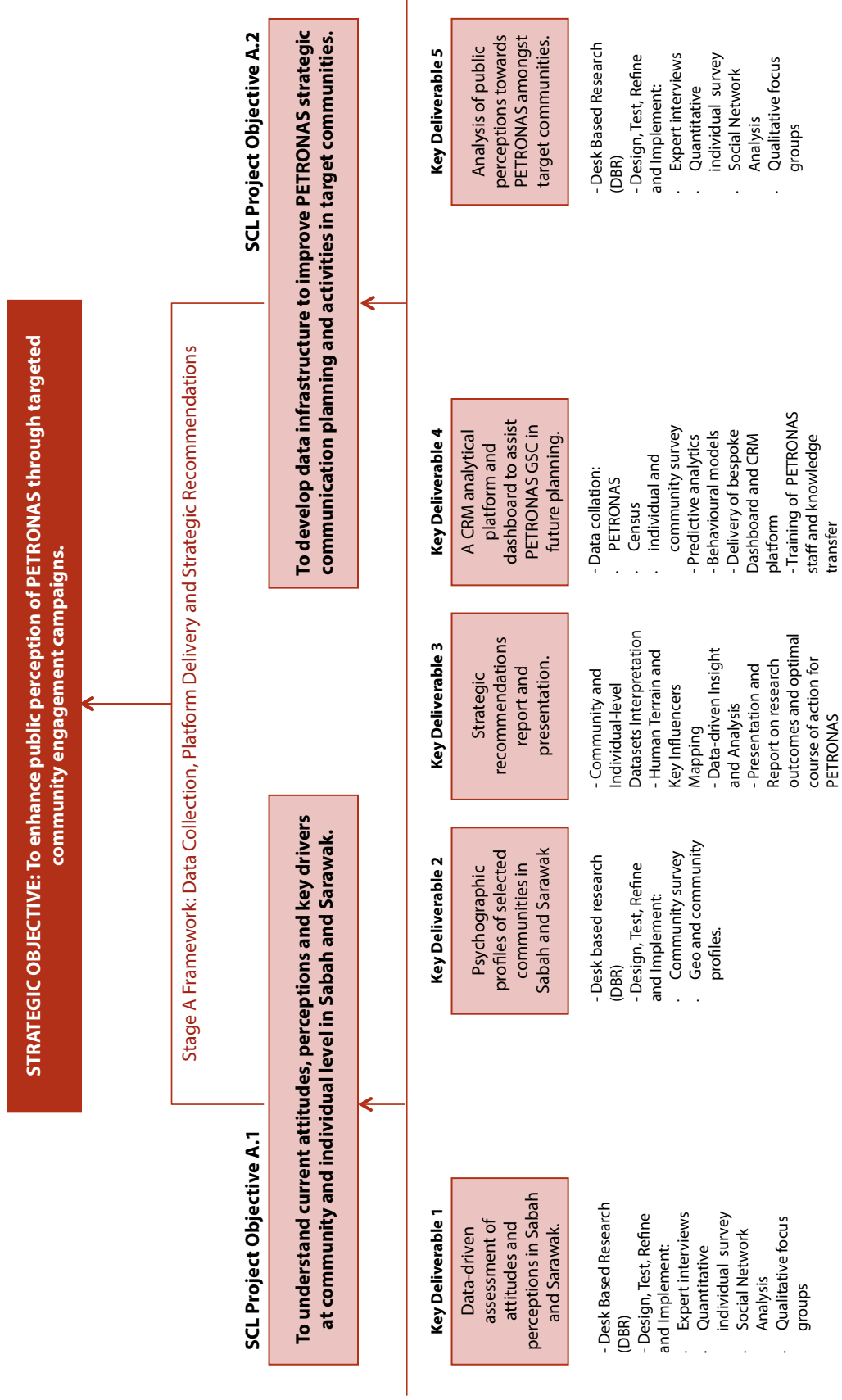
Within this proposal, SCL will present a detailed overview of the context within which PETRONAS operates in Sabah and Sarawak. SCL will outline its proposed response to meet the challenge in terms of succinct, logical and data driven solutions. In line with SCL's approach, each solution will be underpinned by proven scientific methodology empowering PETRONAS to improve its public image, optimise its approach to stakeholder and community relations that will lead to more effectively targeted community engagement campaigns. (See Appendix F for more on SCL communications capacities.)

Amongst the immediate benefits to PETRONAS of the project are as follows:

- **Increased Stakeholder Engagement:** The deliverables of SCL's research will allow PETRONAS to better engage with the communities, groups and individuals that influence its operations in Sarawak and Sabah. With the advantage of data insights and improved internal capacities, PETRONAS will be able to put in place a multi-front communications campaign surrounding its activities. Externally, engagement action will include establishing connections with relevant formal and informal influencers, and internally, will allow PETRONAS to develop the capacity to manage this engagement process. The research undertaking will allow SCL to provide data driven insights to PETRONAS on the challenges that it faces, and consequently who must be engaged.
- **Increased Community Engagement:** The research effort will allow PETRONAS to recognize suitable civil society allies and proxies that have credibility amongst the population and in best placed to work for PETRONAS' interest in the communities. At the macro level it will permit PETRONAS staff to pinpoint the communities that need to be engaged, their salience to particular PETRONAS activities, and indeed the issues/needs with which they are most concerned. At the micro level the SCL analysis and dashboard platform will facilitate PETRONAS in finding the most useful avenues through which to engage individual communities.
- **Resource Optimization:** This project will allow resources allotted for communication to be exploited in a more informed and hence economically efficient fashion. PETRONAS should see a clear improvement in the impact that its communications spend achieves, as in future, PETRONAS leadership will be able to focus such expenditure more scientifically. Furthermore, as enhancements based on the research insights are implemented in the processes of PETRONAS communication units, the organisation will gain a superior institutional capacity.

This proposal presents the first phase of a three-phase solution. Budgets for the entirety of the project are found in Appendix A. An indicative project framework for the subsequent phases can be found in Appendix B.

1.1 Project Framework



1.2 Cumulative Budget

PETRONAS Expenditure: Research, Consultancy and ICT Capabilities	
<i>Cumulative Budget</i>	
<i>Phase 1: Research Design</i>	
Preliminary Research Costs	\$303,440
Pilot & Test Research Instruments	\$126,675
Aggregate Data Procurement	\$35,000
<i>Phase 2: Data Collection</i>	
SCL Research Staff	\$373,565
Sabah (Kimanis, Papar, Tawau)	\$291,755
Sarawak (Kuching, Bintulu, Mukah, Miri)	\$401,005
ICT Equipment & Logistics	\$185,750
<i>Phase 3: Data Analysis</i>	
Predictive Analytics - Data Amalgamation & Modelling	\$30,550
Qualitative Data Interpretation & Influencer Identification	\$34,500
Platform & Dashboard Development	\$150,000
<i>Phase 4: Project Delivery</i>	
Strategic Recommendations	\$209,850
Data Visualisation	\$23,750
TOTAL	\$2,165,840

1.3 Activity Plan

[illegible]

MALAYSIA PROJECT: DETAILED ACTIVITY PLAN																																
	Sep				Oct				Nov				Dec				Jan				Feb				Mar				Apr			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4				
C1.7 Qualitative Data Interpretation																																
C1.8 Quantitative Survey Data Analysis																																
D1. Deliverables: Report Setting Out Strategic Recommendations																																
STAGE 2																																
B2 Data Collection																																
B2.1 Community Survey																																
B2.2 Aggregate Data Procurement from Petronas and Other Sources and B3.1 Data Matching and Amalgamation																																
C2 Data Analysis- Predictive Analytics																																
D2 Deliverables – Community Profiles																																
D3 Deliverables – Dashboard																																

1.4 About SCL

SCL is a trusted behavioural research and strategic communication partner for companies, governments and international organisations worldwide. With a proven track record of over 25 years of successful project management, SCL has set itself apart from the competition by understanding and influencing target group behaviour through the application of scientific methodology.

This methodology was developed by the Behavioural Dynamics Institute (BDi), a behavioural science think tank founded in 1989 by a group of academics, based at the Royal Institute of Great Britain in London. The methodology continues to be developed through field tests and applied practice. Consequently, SCL has at its disposal the most up-to-date methods of analysis and evaluation. With a global presence and in-house experts, SCL has undertaken projects related to population health management, post-conflict rehabilitation of ex-combatants, human trafficking and perception change in reference to harmful cultural practices.

SCL mitigates the challenges posed by operating in such a range of working environments through its selection of field researchers, who are often local staff familiar with the social and cultural intricacies of the country. Additionally, SCL's use of local research contractors permits its staff to employ local languages and social cues to effectively relax and reassure respondents, ensuring that answers are not merely the culturally endorsed 'right' answers, but the true opinion of the respondent. In essence, SCL can deliver validated, reliable and accurate data to tight deadlines and to the highest standards.

It is this focus on quality data that makes SCL exceptionally well-placed to deliver communication campaigns that change not just attitudes, but behaviours. In short, SCL possesses:

- Extensive experience of operating in South East Asia with trained local researchers, as well as a track record of successful projects completed in other regions such as Africa, North & South America, Europe and the Caribbean. (See Appendices D & E)
- Highly-qualified quantitative and qualitative analysts who can deliver robust strategic programme recommendations and timely project development advice based on data centric evidence examination.
- Strong emphasis on integrating existing national, regional and international research, exploiting local knowledge, to ensure that socio-cultural nuances are accurately reflected in all research and communications output.
- Proven ability to design, develop and manage ICT tools to enhance the quality, quantity, accessibility and usability of our research.
- A clear focus on providing solution-focused research in combination with audience-based measures of effectiveness, to allow PETRONAS to implement and maintain the structures required to successfully communicate with stakeholders.
- In depth understanding of community-based communications, (see Appendix F) and the supporting infrastructure to implement these campaigns.

- Demonstrable expertise in formulating, analysing and enhancing policy and best practice in Asia, related to communications capacity building both in the corporate and public arenas.
- Expertise in the most cutting edge approaches to persuasion science combined with a proven track record of applying research insights to real world problems. (See Appendix D)



2. PETRONAS in Sabah and Sarawak: Challenges and Opportunities

The relationship between PETRONAS and the population of Sabah and Sarawak is both a challenge and an opportunity, particularly given PETRONAS' status as the national oil company of Malaysia. Major oil and gas projects in Sabah and Sarawak such as SOGIP, SSGP and SOGT have an immense impact on all aspects of life for the residents of these two states. Furthermore, approximately 250 villages and communities are directly affected by the SSGP project in Sabah and Sarawak due to their proximity to the gas pipeline. It is essential that PETRONAS has a nuanced understanding of the challenges it faces, but also an in-depth understanding of its target audiences in order to engage best with the public and ensure their support for PETRONAS' operations.

2.1 Reputation Challenges

- SSGP and other offshore explorations cut through swing parliamentary constituencies thus generating a high political activity in the area. Public debates on economic opportunities, inequalities in wealth distribution, and the environment, if not properly managed from PETRONAS perspective, can generate negative perceptions towards the company.
- Digital media analytics in 2013 - 2014 showed that concerns such as the oil royalty debate and job opportunities, especially for Bumiputera, are prominent issues among the population. However, digital media insights are neither sufficiently wide-ranging nor deep enough to fully assess the community perceptions of PETRONAS.
- As a Fortune 500 company, PETRONAS is a major corporate actor that adheres to stringent standards of corporate governance. However, its perceived link with the government of Malaysia (GOM) have resulted in an image overlap between the two. Preliminary analysis of public perceptions indicates a negative image towards the PETRONAS.

2.2 Target Audience Insight Challenges

- Previously PETRONAS has deployed numerous broad-brush communications campaigns through creative agencies. Limited knowledge of the impact of each campaign has resulted in missed opportunities to align resources and ensure a targeted and more effective approach to strategic communications.
- Existing public perception surveys conducted on behalf of PETRONAS by TNS have provided limited insights to inform PETRONAS' communication strategy. The TRI*M methodology employed by TNS was not able to delve into the psychographic elements of the target audience. Other key limitations of the TNS study include its small sample size and the limited coverage of survey locations of affected communities. As such, communication campaigns have not been able to impact the targeted audiences to a satisfactory degree.

- Given the depth of sentiment toward PETRONAS, there is a pressing need to establish the underlying reward and motivational structures of the target audience based on the most significant issues. If PETRONAS to ignore this challenge the shift in the political and economic landscape might have a detrimental effect on the company's business activities.

2.3 Stakeholder / Community Engagement and Brand Management Challenges

- PETRONAS' communication strategy has been heavily focused on brand awareness, rather than issue-based communications efforts. The transformation in GSC's strategy towards improving stakeholder perception and strengthening reputational management for PETRONAS requires new and improved data tools and methods to define the right communications strategy to be implemented.
- CSR has been a key component of PETRONAS' communications and outreach campaigns. Good intentions in attempting to identify the most pressing needs of the population and formulate an effective response notwithstanding, these efforts have been impeded by a lack of knowledge on contextual perceptions and needs.



3. Operational Context Overview

3.1 PETRONAS Reputation in Context

Based on the digital media monitoring across key channels in 2013 - 2014, the issues that dominate the online media sphere (particularly social media platforms such as Twitter and Facebook) are all related to the activities of PETRONAS.

Given that PETRONAS' current challenges weigh on political debates in Sabah and Sarawak, the company now needs to stay sensitive to the current landscape and focus clearly on managing its reputation through strategic communications across a spectrum of issues that have a direct impact on its stakeholders. Although the exact state of PETRONAS' public image is relatively unknown, there is a risk of financial and reputational damage to PETRONAS if the political environment dramatically worsens.

One key issue that correlates directly to PETRONAS operations and reputation is the substantial media attention given to the proposed increase of the oil royalty.

Chronology of Events – Oil Royalty

2010 - 2013	2014		
	Jan - Feb	April - July	August
<p>In 2010, Pakatan Rakyat published its Manifesto for the 13th General Election called the Buku Jingga, and among the promises made was to raise the royalties paid on petroleum and hydrocarbon resources to Sabah and Sarawak to 20 per cent from the present 5 per cent.</p> <p>The amount of cash payment received, or more popularly known as oil royalty, has been a simmering issue for the states of Sabah and Sarawak for many years. Although its popularity diminished after the 13th Malaysian General Election, it returned and grew in prominence beginning with the resignation of Pehin Sri Abdul Taib Mahmud, the Chief Minister of Sarawak who helmed the post for close to 33 years. This, coupled with the opposition-led campaigns to capture "fixed deposit" states such as Sabah and Sarawak and the rumours that the Sarawak state election could be held earlier than the April 2016 deadline, facilitated Pakatan Rakyat supporters in Sabah and Sarawak to capitalize on the issue of oil royalty aggressively as part of their political campaigning platforms.</p>	<p>In 2014, there have been a number of opinion pieces, news articles and social media postings particularly by Borneo-based groups, which drove forward this message. Among these are statements from</p> <ul style="list-style-type: none"> Sarawak's new Chief Minister Tan Sri Adenan Satem Sabah's Chief Minister Datuk Seri Musa Aman, <p>Both leaders agree that the oil royalty for these two states can be reviewed or renegotiated.</p>	<p>On 6th May 2014, the Sarawak Legislative Assembly voted unanimously in favour of a resolution to request the Federal Government for an increase in the oil royalty from 5 per cent to 20 per cent. A motion on the increase was originally tabled by Chong Chieng Jen (DAP-Kota Sentosa) but an amended motion, which included seeking more development grants from the Federal Government aside from the royalty, was subsequently tabled by Abdullah Saidol (BN-Semp) and approved.</p> <p>This was stated to be in line with the demands made by the new Chief Minister, Tan Sri Adenan Satem. Concurrently, Sabah opposition politicians stated that it would be tabling a motion for the same request to increase in the Sabah State Assembly. However, this did not happen as their three emergency motions to discuss, among which was the Petroleum Agreement, were rejected for technicality and late submission by the Sabah State Assembly Speaker Datuk Seri Said Keruak. The applications to move the motions were submitted by Bingkor Assemblyman Datuk Dr Jeffrey Kitingan, Likas Assemblyman Junz Wong and Sri Tanjong Assemblyman Chan Foong Hin.</p> <p>While the State Governments and the opposition continue to champion for an increase in the cash payments for the Borneo states, there is another group that is calling for the rights to manage the states' oil and gas resources to be restored. One of its main proponents is Zainal Ajamain, the secretary-general of Parti Kerasama Rakyat Sabah (Pakar). Zainal Ajamain was one of the six Sabahans who filed a suit against PETRONAS and the Sabah State Government in 2012 in a bid to nullify the Petroleum Agreement signed between the national oil corporation and the State Government in 1976.</p>	<p>The latest move by PETRONAS was to agree to increase Sabah state Government's share of LNG 9 to 10% as part of "giving out more to Sabah". This popular move in August 2014 received positive feedback from the Sabah State Government.</p>

Chronology of key events on oil royalty (Source: SCL Team Analysis)

Secondly, the debate on the equal income distributions and improving the quality of life in the communities living in the SOGIP, SSGP and SOGT projects' zones create pressure for PETRONAS in terms of reputation. Based on a preliminary assessment, more than 250 villages within a radius of 10 km are affected by the SSGP pipeline in Sabah and Sarawak.

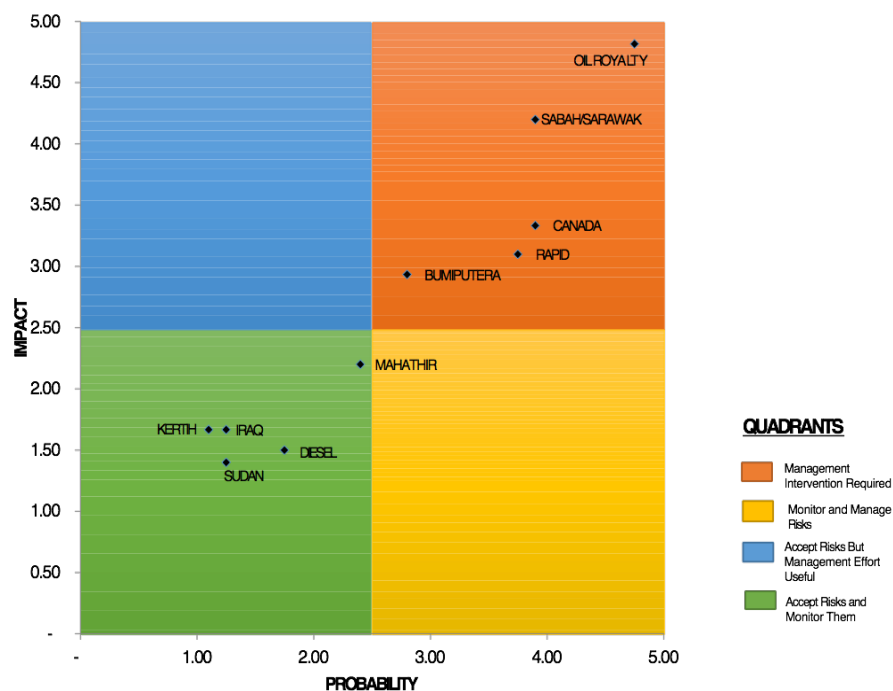
State	Affected Districts, Cities	Estimated Number of Villages / Settlements near the SSGP pipeline
Sabah	Sipitang, Beaufort, Papar, Kimanis	58
Sarawak	Lawas, Bintulu, Miri, Marudi	208

Estimated number of villages or settlements near the SSGP pipeline (Source: SCL Team Analysis)

Other issues such as illegal immigration, coupled with the recent Lahad Datu invasion by the Sulu rebels well as slow socio-economic development of Sabah remains a growing concern for the population that PETRONAS must demonstrate an awareness to. Urbanisation has forced Sabahans to migrate to Kuala Lumpur and greater parts of Peninsular Malaysia in search of better job prospects. The rapid development of key cities of Sabah such as Kota Kinabalu has forced urban and semi-urban populations to demand better job opportunities to increase their household income.

The reputational risk management matrix assessment (i.e. impact vs. probability) of the key issues in digital media from January – July 2014 indicates that a strategic intervention by PETRONAS is necessary in order to improve its current reputational positions.

SCL will harness these digital media insights for the benefit of PETRONAS and enrich this information with the reality. This is an essential approach, particularly given the low internet penetration rates in Sabah and Sarawak.



Reputation risk based on digital media analysis 01/2014-07/2014 (Source: SCL Team Analysis)

3.2 Target Audience Analysis

PETRONAS has tended to adopt creative-led approaches to the design of communication campaigns. Creative agencies take the lead in defining the target audience or in deploying the end product (i.e. billboards, posters, video production, television commercials) through the relevant media channels. The bulk of the work in designing a campaign involves perfecting the creative messages, project planning and other campaign aesthetics. However, this widely adopted approach does not involve gaining an in-depth understanding of key elements of the target audience, such as their underlying motivations, reward structure or emotional needs. In most communication campaigns target audience profiling is based on basic demographics (e.g. age, ethnicity, location) and consumer lifestyle data (e.g. time spent on TV, radio, internet, hobbies, etc.) obtained from third parties. However, given the intensity of socio-political dynamics between PETRONAS and the Malaysian population, there is a substantial need to establish the underlying motivation structures and psychographics of the target audience.

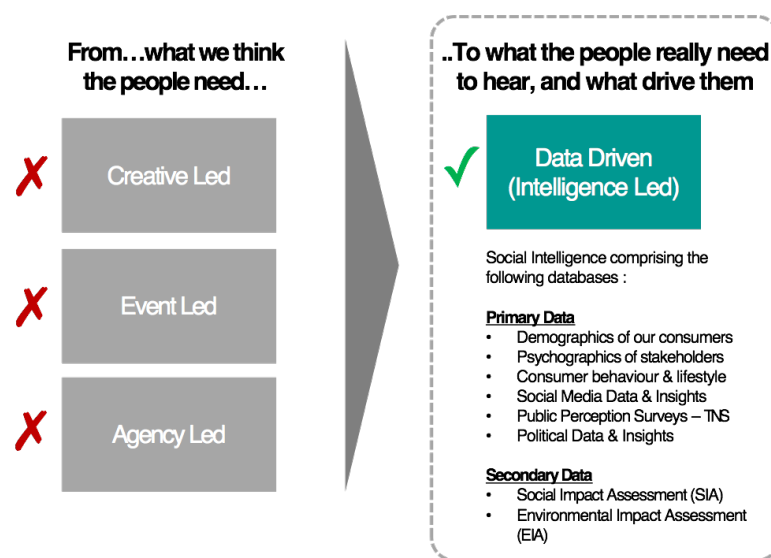


Illustration of shifting towards data driven campaigns for PETRONAS (Source: SCL Team Analysis)

In order to effectively rise to the challenge of reaching and influencing target audiences, PETRONAS should gradually shift from "intuitive thinking of what people want to hear" to "data driven approaches to what people need to hear and what drives them". This radical shift is a fresh approach to using empirical data that consists of demographic and consumer data coupled with psychographic profiles of the target audience.

This fresh approach requires the integration of immense data sources (quantitative or qualitative), some already available to PETRONAS and others to be collected through SCL's primary research. The level of detail in each available dataset can vary greatly, for example, the consumer lifestyle data consists of a limited amount of information that can be obtained from third parties such as Nielsen or Zenith Media. The quality of the third party data will present challenges to SCL, but a full audit of available data will be performed before embarking upon the project and a strategy for managing this data will be developed.

Data / Insights	Current Data Availability	Level of Info / Insights (Sufficient / Limited)	Data Source	How effective or important the data is in relation to GSC ?
Demographic	Yes	Sufficient	Nielsen, Zenith	High
Consumer / Lifestyle	Yes	Limited	Nielsen, Zenith	High
Social Media	Yes	Sufficient	Berkshire	High
Customer Surveys	Yes	Sufficient	TNS Survey, Merdeka Centre, PETRONAS PDB, etc	High
Public Perception Poll	Yes	Limited	TNS Survey, Merdeka Centre, others	High
Social Impact Assessment	Yes	Sufficient	PETRONAS OPUs and others	High
Environmental Impact Assessment	Yes	Limited	PETRONAS OPUs and others	High
Stakeholder detail Profiling – Name, Income household, constituency, IC	No	n/a	Barisan Nasional + Special Branch	High
Ground Intel - Psychographic / Psychometric	No	n/a	n/a	High

Preliminary list of available data in PETRONAS that are used to understand the target audience for the purpose of campaign and community engagement (Source: SCL Team Analysis)

This Project will afford PETRONAS the opportunity to properly understand underlying motivations, personality and behaviour throughout communities in Sabah and Sarawak. These insights will allow PETRONAS to formulate an effective response to current issues. PETRONAS will very quickly be able to build on what has been achieved to develop tools and insights in partnership with SCL to enhance current popular perceptions in Sabah and Sarawak.

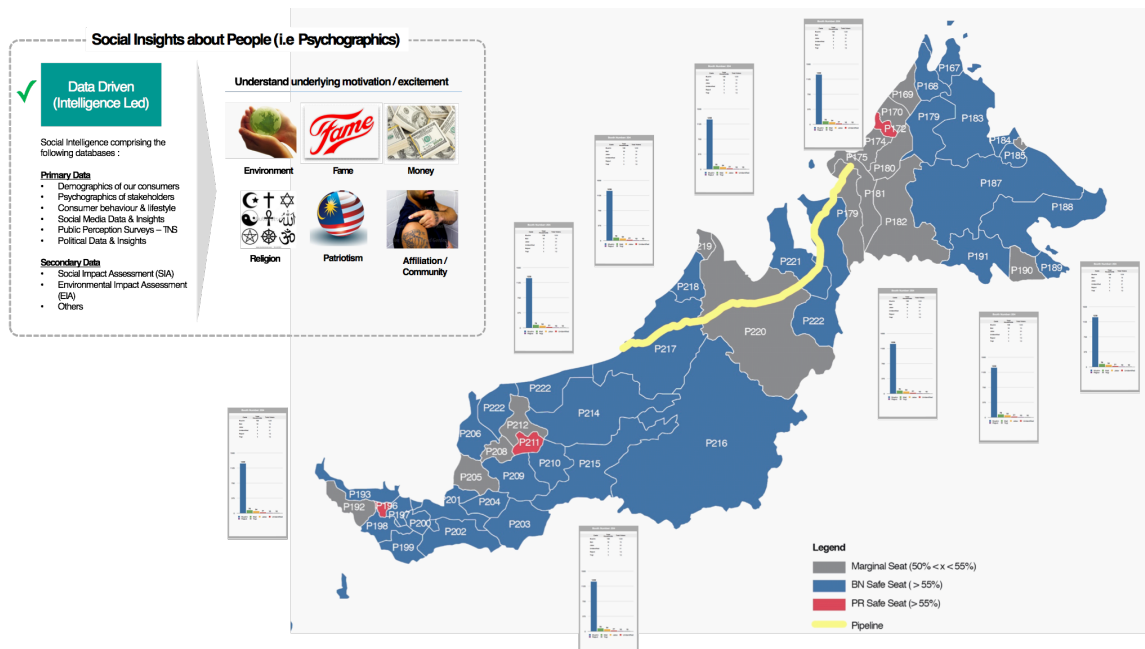
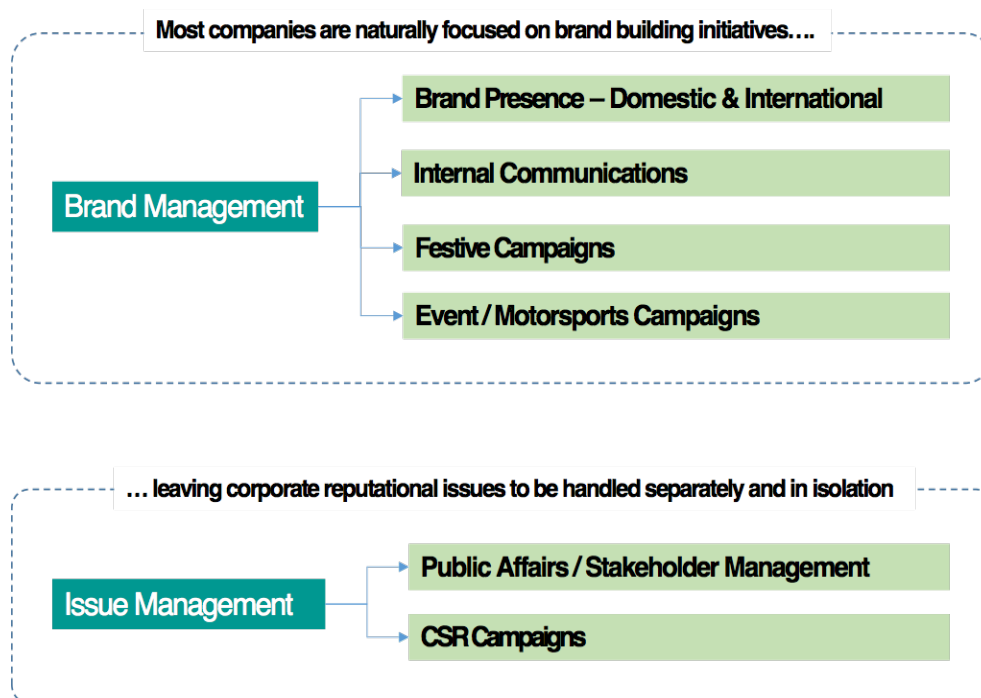


Illustration of how community profiling showing different information such as psychographic and demographics (Source: SCL Team)

3.3 Stakeholder / Community Engagement and Brand Management

PETRONAS' communication strategy has been heavily focused on brand management and promotion. Key examples of this include corporate sponsorship of festivals and sporting events such as Hari Raya, Chinese New Year, Deepavali, and Formula 1. PETRONAS has been extremely successful at increasing its brand awareness at both the domestic and international levels. Given the perception of PETRONAS as a flagship of Malaysian commerce, the company is well-positioned to carry out issue-based campaigns that would not only increase brand awareness, but also increase socio-political perceptions.



Preliminary list of available data in PETRONAS that are used to understand the target audience for the purpose of campaign and community engagement (Source: SCL Team Analysis)

PETRONAS has taken progressive steps to transforming its communication strategy. Priorities included intensifying effective stakeholder collaboration, enhancing community engagement and reinforcing the brand and culture of the company. However, there is still work to be done to ensure that the right data, tools, and methods are utilised in making strategic communication decisions.

PETRONAS sponsored poster communications illustrate how deployment of the right media channels can be a powerful tool to convince a select group. However, success will only be achieved if sufficient demographic and psychographic information of the target group has been made available. Strategic communication campaigns (e.g. face-to-face, dialogues, media advertising or third party advocacy campaigns) can only be effective if we understand the unique psychographic profiling that can affect or modify behaviour in those areas.

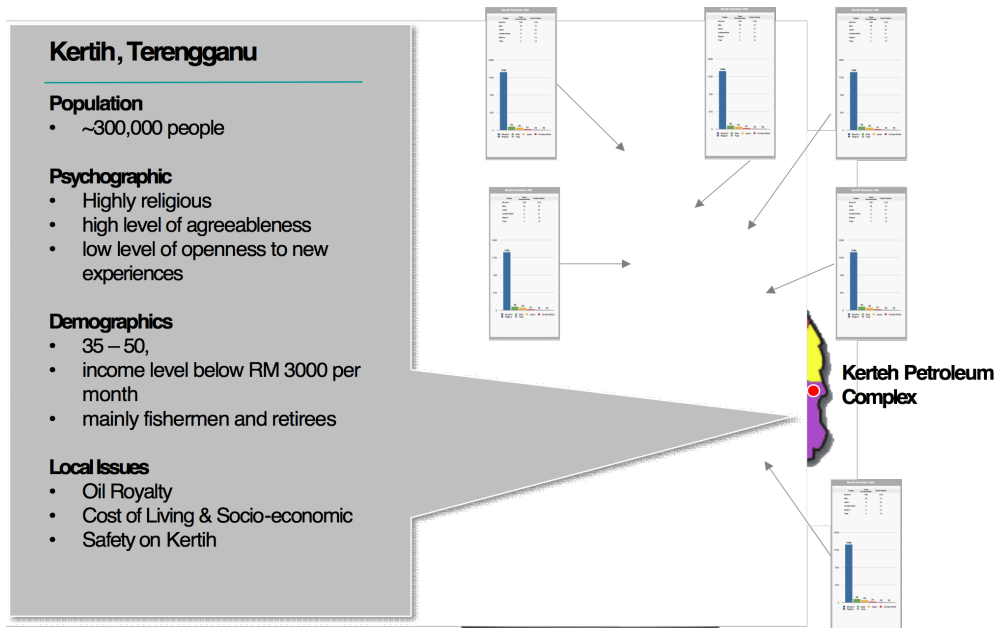


Illustration of psychographic profiling at community or district level (Source: SCL Team)

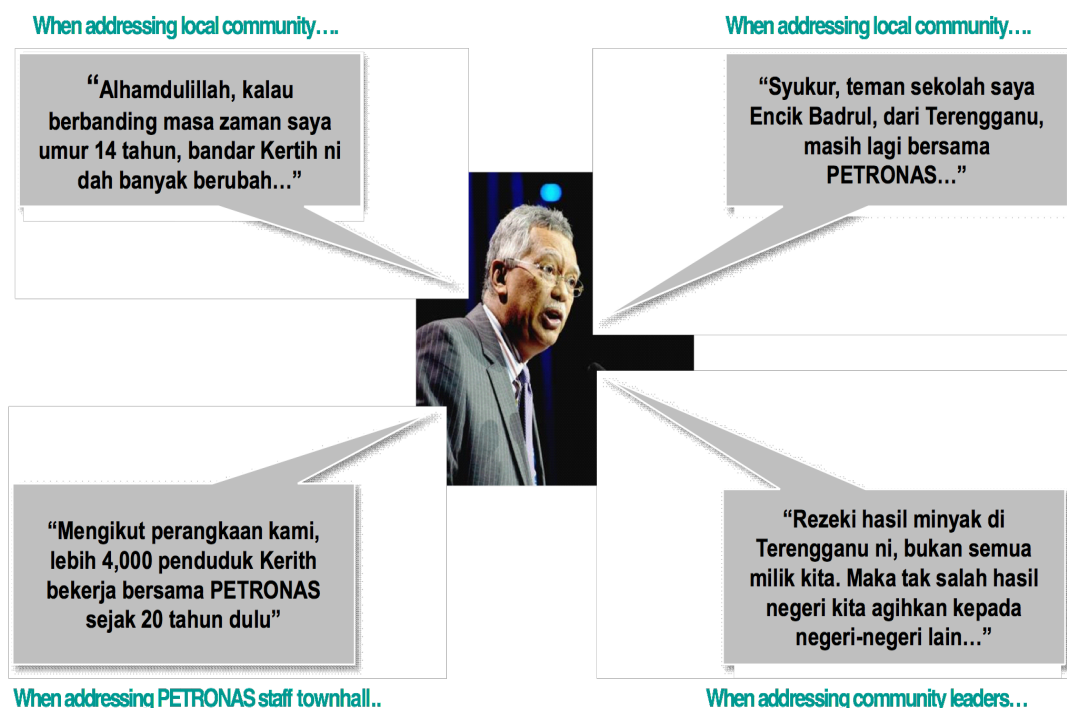


Illustration of psychographic profiling can be used to develop targeted messages for PETRONAS leaders (Source: SCL Team)

PETRONAS’ external stakeholder management is key in shaping and improving public opinion and must be handled comprehensively at a strategic level. Rather than allowing issues pertinent to the local communities in Sabah and Sarawak develop organically there is a need to move from passive issue monitoring and reactive policy to proactive issue management in the medium to long term.

SCL recognises that issue-based campaigns require a sufficient level of information about the target audience. This information should be dynamic and unique to specific target groups and locations. Accessibility to such levels of information can be a powerful tool for organisations to shape public opinion on key issues.

SCL's research findings in this proposal can bridge the knowledge gap in understanding the psychological drivers of people in Sabah and Sarawak. This will improve PETRONAS' microtargeting capabilities in the medium to long term.

3.4 PETRONAS Corporate Social Responsibility Activities in Sabah & Sarawak

PETRONAS has invested significant amount of resources and effort in Corporate Social Responsibility (CSR) and Corporate Social Investment (CSI) programmes in both Sabah and Sarawak over the last ten years.

The main themes of the CSR / CSI campaigns are founded on event-based programmes – mainly on education, environment and capability building.

Based on SCL's preliminary discussion and findings with PETRONAS, some of the past and present CSR / CSI campaigns have yielded varying degrees of success. Although most of the CSR campaigns have clear objectives and outputs. Preliminary assessment within the limited constraints and information pointed to three distinct observations:

- The CSR / CSI programmes were not aligned to the reputational issues that affect PETRONAS (eg: oil royalty, Bumiputera issues, Sabah & Sarawak issues)
- The CSR / CSI programmes did not contain clear campaign or call-to-action messages that can be converted into political or Public Relations mileage
- The CSR / CSI programmes were not targeted to specific locations or communities

In July 2014, PETRONAS GSC commissioned Price Waterhouse Coopers (PwC) to review past and present CSR activities as part of PETRONAS's transformation agenda. The objective was to review the effectiveness of these campaigns in order to achieve better alignment based on future PETRONAS communication strategies.

Given the above scenario, SCL will bring unique knowledge and expertise to augment existing PwC findings by ensuring future issue-based communication campaigns are managed more effectively through alignment of tailored messages for targeted audiences. Our proposal will cover the establishment of a more robust understanding of the target audience through psychographic profiling of communities affected by PETRONAS' operations in Sabah and Sarawak.

Malaysia's 13 th Parliamentary Election Results							
	BN	DAP	PKR	PAS	Total seats	BN gain or loss	PR gain or loss
Perlis	3	0	0	0	3	-	-
Kedah	10	0	4	1	15	6	-6
Kelantan	5	0	0	9	14	3	-3
Terengganu	4	0	0	4	8	-3	3
Penang	3	7	3	0	13	1	-1
Parak	12	7	3	2	24	-1	1
Pahang	10	1	2	1	14	-2	2
Selangor	5	4	9	4	22	-	-
Federal Territory	4	5	4	0	13	1	-1
Negri Sembilan	5	2	1	0	8	-	-
Malacca	4	1	1	0	6	-1	1
Johor	21	4	1	0	26	-4	4
Sabah	22	2	1	0	26	-4	4
Sarawak	25	5	1	0	31	-2	2
Total	133	38(+10)	30(-1)	21(-2)	222	-7	7

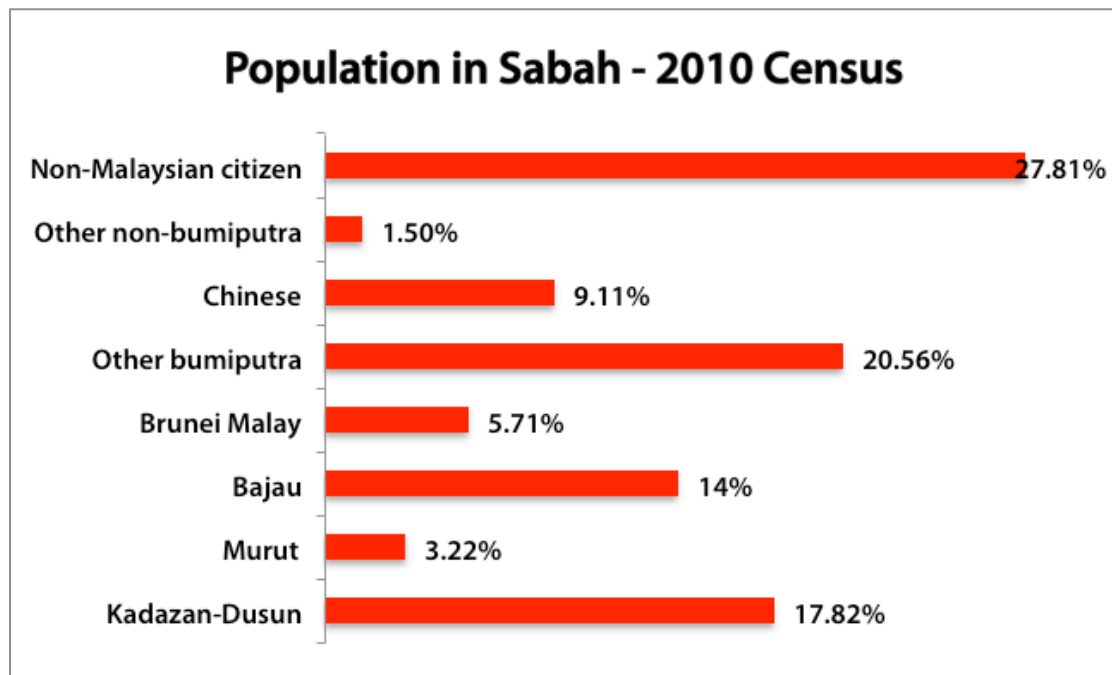
Malaysian Electoral Commission

3.4.1 Overview: Sabah

Geographically, Sabah is the second largest state in the country, comprising five administrative divisions, which are in turn divided into 25 districts. Sabah's population numbered 651,304 in 1970 however in the two decades following 1980, the state's population grew at a staggering rate. As of 2010, the population had grown to 3,117,405, with foreigners making up 27% of the total. The breakdown of population in Sabah based on ethnicity is shown in the table below.

Public sentiment on the economic situation in Sabah has deteriorated significantly between 2009 and 2012. Key public concerns include personal income, job opportunities and the price of consumer goods, coupled with growing fear of illegal immigration-related unemployment due to the influx from the neighbouring Philippine islands. These sentiments are widespread across all communities in Sabah including Muslim Bumiputeras.

Sabah's high population growth has been a result of legal and purportedly state-sponsored illegal immigration and naturalisation from elsewhere in Malaysia, Indonesia and particularly from the Muslim-dominated southern provinces of the Philippines. Many who were deemed Malay were granted citizenship. As a result Bornean Sabahan groups, most of whom are Christian, have become minorities in their own homeland, a severe cause of ethnic tension in Sabah. On June 1st 2012, Prime Minister Najib Razak announced that the federal government has agreed to set up the Royal Commission of Inquiry (RCI) on illegal immigrants in Sabah.



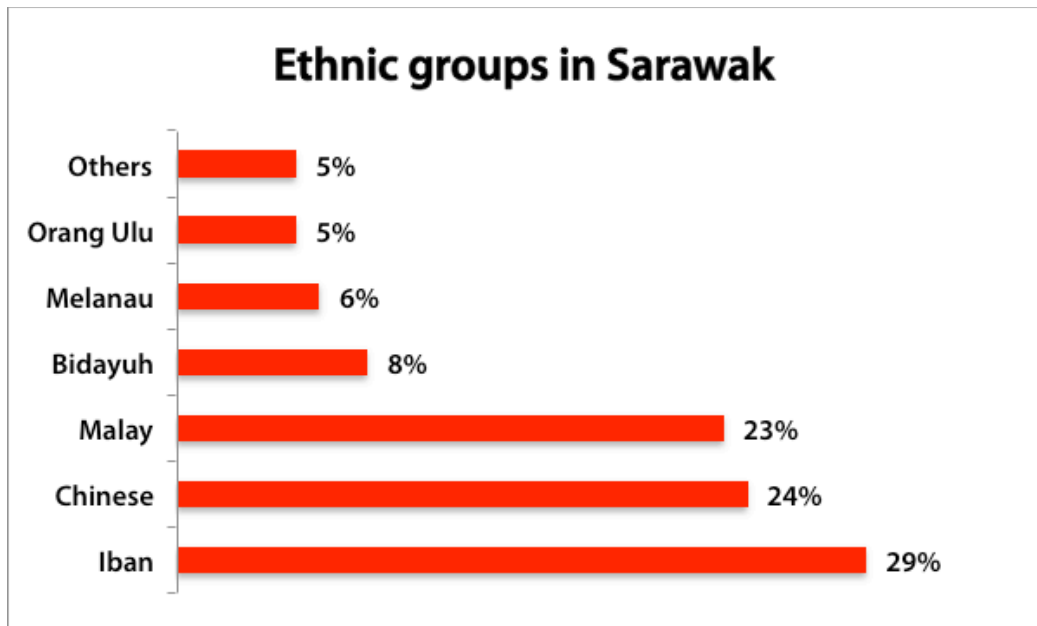
Source: Dept. of Statistics, Malaysia

Economically speaking, in 2009, 20% of Sabahians were living below the international poverty line of \$1/day. While petroleum and palm oil are the two most commonly exported goods, the Sabahan economy consists mainly of agriculture and tourism. In the 1970's Sabah was the 2nd richest state in Malaysia. In 2010, it was ranked the poorest state. The fall in economic status is in part attributed to a timber boom in the 1970's to 90's that eventually led to mass deforestation. With no clear economic plan, when the boom ended (around the same time as the Asian financial crisis), the economy began to shrink rapidly.

The political dynamics of Sabah rotate around the United Malays National Organisation (UMNO), the main BN component party. The Chief Minister of Sabah, Datuk Seri Musa Aman, who is leading the UMNO party in Sabah, has played a significant role in shaping public confidence and voter support in the last general election. UMNO managed to win 31 state assembly seats out of the 32 that it contested. Other BN component parties such as Parti Bersatu Sabah (PBS), United Pasokmomogun Kadazandusun Organisation (UPKO) also played crucial role by winning state assembly seats in Sabah.

3.4.2 Overview: Sarawak

Sarawak is the largest state in Malaysia, stretching over 750 kilometres (470 mi) along the northeast coastline of Borneo. The administrative capital is Kuching, which has a population of 700,000. As of the last census (2010), the state population was 2,420,009, one of the most populous in Malaysia. In contrast with Sabah, Sarawak has a strong economy (the third largest of the Malaysian states) with an estimated GDP of RM 50,804M. In 2010, it was reported that Sarawak had the second largest GDP per capita in Malaysia (RM 33,307). Though it still relies heavily on natural resources to drive its economy, Sarawak does have large services and tourism sectors.



Source: Dept. of Statistics, Malaysia

In Sarawak, politics are defined by other key BN component parties such as Parti Pesaka Bumiputera Bersatu (PBB), Parti Rakyat Sarawak (PRS) and Sarawak United People's Party (SUPP). The BN component parties in Sarawak, under the previous Chief Minister of Sarawak, Abdul Taib Mahmud, provide the most voters and seats to the BN coalition. In the last Sarawak State election of 2011, BN won by a landslide. In short, the Sarawak political landscape remained dominated by Parti Pesaka Bumiputera (PBB) and Sarawak United People's Party (SUPP), with the notable exception of urban seats (i.e. Kuching, Bintulu, Sibu). The opposition party Pakatan Rakyat (PR) is gaining momentum in the urban and semi-urban seats.



4. Meeting the Challenge: Project Objectives

4.1 Overview of project objective

SCL Commercial will contribute to the overarching strategy of enhancing public perception of PETRONAS through **two project objectives**:

- To understand current attitudes, perceptions and key drivers at community and individual level in Sabah and Sarawak.
- To develop data infrastructure to improve PETRONAS strategic communication planning and activities in target communities.

The two project objectives will be achieved through 5 key deliverables:

Project Objective	Key Deliverables	Description of deliverable
A.1 To understand current attitudes, perceptions and key drivers at community and individual level in Sabah and Sarawak.	1. Data-driven assessment of attitudes and perceptions in Sabah and Sarawak.	<ul style="list-style-type: none"> • Desk Based Research (DBR) - Design, Test, Refine and Implement: <ul style="list-style-type: none"> • Expert interviews • Quantitative individual survey • Social Network Analysis • Qualitative focus groups

Project Objective	Key Deliverables	Description of deliverable
A.2 To develop data infrastructure to improve PETRONAS strategic communication planning and activities in target communities.	5. Analysis of public perceptions towards PETRONAS amongst target communities.	<ul style="list-style-type: none"> • Desk Based Research (DBR) - Design, Test, Refine and Implement: <ul style="list-style-type: none"> • Expert interviews • Quantitative individual survey • Social Network Analysis • Qualitative focus groups

Project Objective	Key Deliverables	Description of deliverable
Common deliverables of strategic objectives A.1 & A.2	2. Psychographic profiles of selected communities in Sabah and Sarawak	<ul style="list-style-type: none"> - Desk Based Research (DBR) - Design, Test, Refine and Implement: <ul style="list-style-type: none"> • Community survey • Geo and community profiles.
	3. Strategic recommendations report and presentation.	<ul style="list-style-type: none"> - Community and Individual-level datasets Interpretation - Human Terrain and Key Influencers Mapping - Data-driven Insight and Analysis - Presentation and report on research outcomes and optimal course of action for PETRONAS
	4. A CRM analytical platform and dashboard to assist PETRONAS GSC in future planning.	<ul style="list-style-type: none"> - Data collation: <ul style="list-style-type: none"> • PETRONAS • census • individual and community survey - Predictive analytics - Behavioural models - Delivery of bespoke Dashboard and CRM platform - Training of PETRONAS staff and knowledge transfer

4.2 Strategic Recommendations

After the completion of Phase 1 of the project SCL will be in a position to identify a number of strategic policy and operational recommendations. These will be founded on the rigorous socio/political analysis of targeted populations and data obtained from the field.

The full scope, scale and specificity of the policy, communication and operational recommendations will be informed and aligned to the outcomes of the research. Specific elements that will feed into the recommendations include:

- A detailed image of the social and political dynamics in Sabah and Sarawak sourced via a comprehensive dataset measured down to the community level.
- An understanding of the social and perceptual realities that are relevant to PETRONAS' activities. Additionally, targeted research will establish how PETRONAS'

actions have influenced public perceptions in the past allowing future strategy to be more intelligently shaped and, crucially, data led.

- Improved oversight of community dynamics, key influencers and power relations. This will allow PETRONAS' future communication campaigns to be targeted in manner that ensures the most opportune distribution channels are utilised whilst carrying a bespoke and optimised message that aligns with PETRONAS' strategic objectives and yet resonates with the salient audience groups.

In summary: SCL's work will enable PETRONAS to understand their relationship and impact on communities in Sabah and Sarawak to a greater depth via a rigorous data led methodology. Coupled with SCL's data infrastructure products, this project will result in an enduring improvement in PETRONAS' communication capacity. This will include significant enhancement of PETRONAS' ability to understand their socio/political position and the effect of their activities on pertinent communities. And, more importantly, how to positively influence the perceptions within targeted populations so that they become more amenable to PETRONAS' work.

Phase two and three of the project will design and deliver a bespoke communications campaign that is aligned with PETRONAS' strategic objectives. The campaign itself will be shaped by SCL's deep understanding of PETRONAS' communications requirements that were identified during Phase one. Phases two and three will focus on planning and implementation of the final campaign and will be composed of a significant amount of communication training and capacity building for PETRONAS' communication assets.



5. Research Methodology

SCL understands the power of motivation. Using Target Audience Analysis (TAA), a process comprising the best available audience research techniques, SCL is able to develop Targeted Audience Profiles (TAPs) and to identify the most compelling ways to influence behaviour. Whether by harnessing the power of binaries, utilising reward structures, aligning attitudes or replacing them with psychological drivers, SCL helps clients to achieve their goals. This section describes the proposed TAP design, TAA framework components and outlines the suggested process.

Target Audience Profiles & Psychosocial Research Parameters

Target Audience Profiles (TAPs) provide the raw ingredients to influence planning by utilising a number of theories in psychology, sociology and economics. TAPs examine the psychological characteristics of individuals to assess the true reasons for their choices and behaviours. Target audiences can be examined for the psychological consistencies amongst their individual members, but also in aggregate to build psychographic profiles of entire communities.

TAPs (at the individual or community level) are composed by taking into account a variety of parameters:

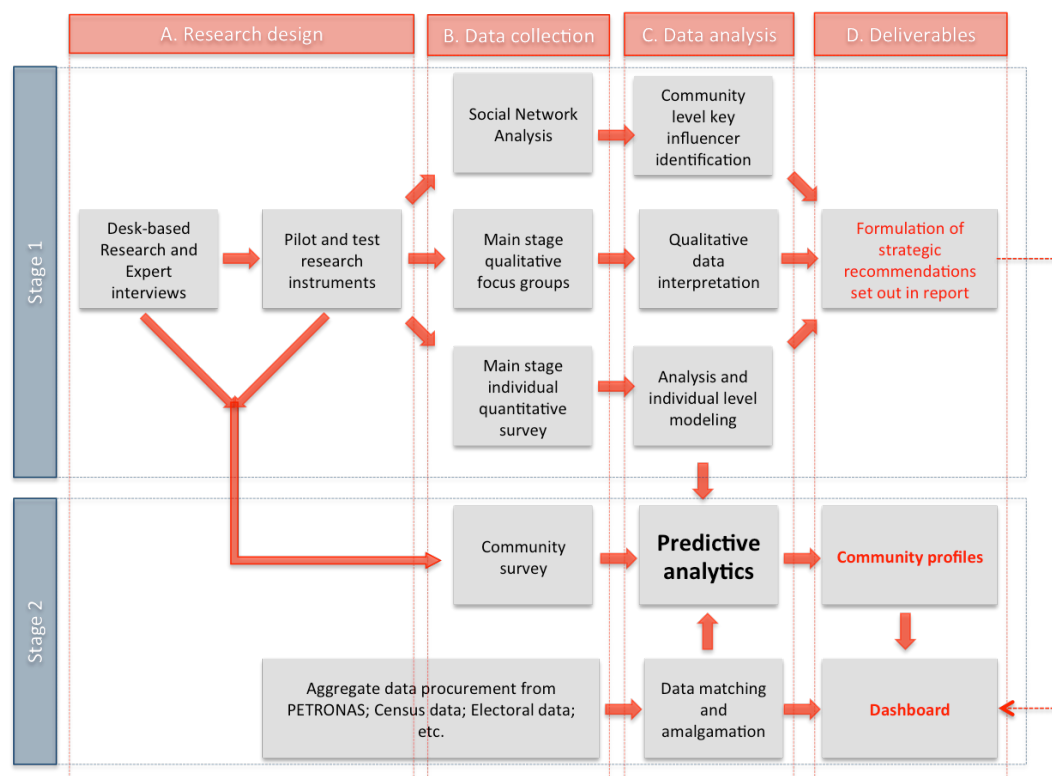
- Narrative parameters: Examine the explicit themes that frame an audience's perception of its circumstances. These parameters explore the principles that guide decision-making beyond the simple repercussions of a particular action.
- Behavioural parameters: Measure the factors that incentivise and constrain audience actions. These parameters outline the consequences that audience members expect from their actions.
- Identity Parameters: Measure attributes of self-identity and the circumstances that define target groups. This set of considerations outlines the self-identity aspects of a group and which aspects of this identity are most salient for efforts to influence attitudes/behaviour.
- Communication Parameters: Identify the ways in which an audience digests new information in its decision processes. Understanding these processes is essential not only to identify what information a group receives but also how it is delivered and then used within a group for its behavioural choices.

Psychological instruments such as interviews, focus groups or surveys, as well as experiments are generally the most useful methods to identify the parameters that give rise to certain behaviours. To scrutinize the factors that underlie those behaviours, the perceptions and thinking of selected participants will be carefully analysed. SCL aims to assess the following psychological factors in particular:

- Baseline psychometric diagnostics
- Emotionality
- Socio-moral threat salience and shame proneness
- Susceptibility to influence
- Compliance to authority
- Self-efficacy and attribution style
- Approach/avoidance orientation (BIS – BAS)
- Self-congruency and ethos of credibility
- Involvement and hierarchy of needs

The Process

TAA is organized as a two-stage process. (See the diagram below). During the first, SCL will design and conduct qualitative and quantitative research. In the second stage a community profile and data amalgamation dashboard and CRM will be built.



Stage 1 – Quantitative and Qualitative research

5.1 Research Design

Desk Based Research & Expert Interviews

Proposed work		
	Number of units	Time requirements
Desk Based Research	-	3 weeks
Expert interviews	15 interviews	3 weeks

SCL proposes to begin by carrying out Desk Based Research and expert interviews to deepen understanding of the issues and problems faced by PETRONAS. The information collected during the research design phase will feed into and shape the main data collection stage. As such, the following activities are proposed:

Activity	Data sources	Aims
Desk Based Research		
Analysis of how PETRONAS is portrayed in the mass-media versus other supermajors	Internet searches, library documentation, print newspapers	Inform the themes that SCL would need to focus on in the main data collection stage of the research
Analysis of previous projects implemented by PETRONAS and their outcomes	Documentation to be provided by PETRONAS	Inform the in-depth definition of the problem facing PETRONAS, which in turn, defines the content of the data collection stage
Review of similar research projects carried out in similar industries (best practice analysis)	Industry analysis, academic journals, analysts' reports	Inform the overall design of the main data collection stage research and the interpretation of the results
Review and analysis of existing social and market/commercial surveys in Malaysia	NGO sources, Research institutes, Polling companies, Universities	Inform wording of questions and research themes in the main stage
Review and analysis of the most recent census data in Malaysia	Department of Statistics, Malaysia	Inform the technical design of the sampling framework for the main data collection stage

Activity	Data sources	Aims
Expert interviews		
PETRONAS staff at all levels	-	Inform a clear problem frame as described by the client's staff
Academic experts	-	Inform research feasibility assessments
Relevant NGOs members		Inform research feasibility assessments and improve understanding of stakeholders

Pilot and Test Research Instruments

Proposed work		
	Number of units	Time requirements
Design instruments for social network analysis (influencer survey); focus groups (discussion guide); and quantitative surveys (Questionnaires)	-	3 weeks
Design pilot testing procedure	-	2 weeks
Implement separate pilot schemes in Sabah and in Sarawak	-	2 weeks
Translation	-	1 week

Grounded in Desk Based Research and expert interviews, SCL will design and test a bespoke suite of scientific investigative instruments such as questionnaires, focus groups, and social network analysis. In combination these will be used to assess attitudes that surround PETRONAS in both Sabah and Sarawak. The framework and the discussion guidance materials developed by SCL will be used by moderators trained in Behavioural Dynamics Institute (BDi) methods to steer the groups and individuals towards the topics and opinions that are most salient to PETRONAS' objectives.

Each set of instruments has its own merits and adds a different layer of understanding to the project. For instance, focus groups (as opposed to surveys) allow participants a certain degree of freedom in terms of the topic as well as style of interaction.

In turn, BDi trained moderators are able to direct discussions in order to extract the maximum insight value as well as to obtain the necessary qualitative understandings. The group format and the questions deployed will facilitate wider discussions, whilst the more relaxed environment allows perceptions about the client to be explored. Moreover, focus groups will be designed to identify the problem definition and communication channels that could be used to most effectively change audience behaviour in the future.

Quantitative surveys on the other hand, can provide more standardized insights that can be translated to a larger scale thus revealing broader themes. The survey for data collection will

be designed to ensure that it meets rigorous SCLs scientific criteria. Each question will be formulated to avoid bias and deliver the maximum possible knowledge from those that participate in the field study.

Prior to the launch of the focus groups and the survey, SCL will test its materials via a small number of pilot exercises. In other words, a limited number of surveys and focus groups will be carried out before the actual data collection effort begins. The advantage of testing instruments is that it allows for modification and refinement of the research tools and materials as well as revealing logistical difficulties early on, before the main data collection stage is conducted.

SCL is highly experienced in working in international contexts and has an established procedure for the translation of its research tools and instruments into relevant local languages. Both the research staff in the UK as well as the local liaison personnel will oversee the development of culturally appropriate research tools. SCL places a great emphasis on ensuring that all materials are phrased to avoid cultural biases, unclear language, and overly complex terminology. SCL will also work to eliminate any statements that could be interpreted as offensive by the survey participants. Vast experience in the process of translation and localisation means that SCL not only considers the language implications but also stays sensitive to the cultural, social and historic contexts in which questions are asked.

5.2 Data collection

Social Network Analysis

Proposed work		
	Number of units	Time requirements
Sampling framework design	-	3 weeks
Number of interviews per locality	100 people per locality	4 weeks
Number of localities per state	10 localities	

Any type of community, whether urban or rural, well-developed or under-developed, regardless of its ethnic composition (multi-ethnic or homogeneous) is based on the relationships between its members. The community represents the framework in which, through various degrees of reciprocity-based exchanges, all its members satisfy their social, material and psychological needs. Therefore, based on the degree of exchange, one can define the concept of community as being a socially hierarchical structure. In this structure, the concept of leadership emerges, leaders being members of the community that have the highest number of connections with other members, the highest intensity of influence upon them and/or the ones benefiting the most advantageous exchanges. Thus, at the level of any type of community, it is strictly connected with that of the social structure. This social construct is based on various forms and types of hierarchies among its members.

Social Network Analysis aims to identify the key influencers in each community through mapping the relationships that naturally occur between members and, to analyse the key features of the generated maps such as the identity of individuals with the highest number of connections, nature and connection hierarchy; and, last but not least, the level of reach in terms of social distance the respective individuals have for effective influence. (See appendix G)

This activity will provide PETRONAS with a clear picture of what type of people it needs to target in order to get its message across. In areas where classic or modern media has low penetration, knowing what types of individuals (e.g. the religious leader; the village elder, etc) are influencers is key to effective message dispersion through “word-of-mouth”.

Main Stage Qualitative Focus Groups

Proposed work		
	Number of units	Time requirements
Number of focus groups per state	10 focus groups	3 weeks
Number of people in a focus group	10 people	3 weeks

Focus groups are conducted by SCL in order to gain qualitative knowledge about the perceptions and attitudes that prevail amongst certain communities in the areas most relevant to the client and its goals. The make-up of the participants in each group is based on either a representative cross-section of the community in which the focus group is held; or when appropriate, composed of a mix of certain types of individuals such as the elderly, women, or parents as and when these groups are salient to the issue in question.

Although the exact number of groups, the composition, and number of participants within is unique to each project, generally groups have 10 or so members. Led by an SCL moderator, groups run between 90 and 120 minutes and are structured to provide insights into the most salient issues surrounding client goals. Focus groups have the inherent advantage of facilitating an inter-group dynamic whereby participants can discuss and debate topics in a way impossible during single member interviews. This conversational approach can help to uncover divergent opinions amongst participants and the community at large, as well as give a sense of the strength of such opinions. In both Sabah and Sarawak SCL intends to conduct 10 focus groups respectively. This exercise will take three weeks for each region.

Main Stage Survey Individual Quantitative Survey

Proposed work		
	Number of units	Time requirements
Sampling framework in Sabah and Sarawak	-	4 weeks
Data collection in Sabah	5000 respondents	8 weeks
Data collection in Sarawak	7000 respondents	9 weeks

A quantitative survey of the population of Sabah and Sarawak will be conducted with the required level of granularity to deliver the insights for the individuals in each community, which can then be aggregated into community level profiles. The proposed parameters of the survey (subject to change) are set out below:

- The sample size will be selected according to the granularity and type of information required by PETRONAS (this being 5000 and 7000 respondents in Sabah and Sarawak respectively);
- A clear random sampling framework will be put together (SCL proposes to use a multistage clustered bi/tri stratified random sampling);
- Interviews will be conducted face-to-face by field researchers travelling throughout the two states over the course of the research project. The questionnaires will be fielded using Android devices (and the Qualtrics data collection software);
- Field research team members will be responsible for uploading the collected data 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 on an electronic database, allowing for statistical analysis and presentation in forms of graphs and charts;
- Overarching and comprehensive quality checks will be carried out throughout.

All aspects will be overseen by the SCL Core Project Team who will be responsible for quality control and adherence to the constraints of all activities and deliverables. The team will supervise locally based management, who in turn, will ensure that the highest standards are observed during data collection.

5.3 Data Analysis

Community Level Key Influencer Identification

Proposed work		
	Number of units	Time requirements
Data management	-	2 weeks
Influencer map generation	-	1 week
Attribute analysis	-	1 week
Identification of influencers	-	1 week

The data required for Social Network Analysis will be obtained through applying a questionnaire in each community to a snowball sample of respondents: starting from several randomly selected individuals, the questionnaire will contain a so-called name generator battery of questions. Each respondent will be asked to provide SCL with the names of maximum of five other individuals from the community from whom the respondent seeks advice. After obtaining the respective names and contact details, the respective contacts are

also interviewed and asked to answer the same questionnaire thus each one of them generates a maximum number of another five respondents.

After a sufficient amount of interviews are carried out, the connections between the members of the communities will become apparent. By measuring the respondents, the ties between them, and by assessing a key set of attributes - such as formal social position of the respondent in the community, formal social position of each one of the named peers, strength of the tie with each, demographics, socio-political views and attitudes – maps will be created that will contain not only quantitative information on the social distance between the nodes (members of the network) but also a qualitative assessment of the implications of the respective distance with regards to the attitudes and behaviour of the people in the network. Bearing in mind that a tie between two or more people cannot take place in the absence of consensus on key dimensions and having information on the nodes and behaviour between them, it is possible to identify the key influencers in each mapped community. The purpose of this exercise is not necessarily to obtain the individual identity of the respective nodes by name but to detect their identity in terms of the formal role they have in the community: the religious leader, the teacher, the doctor, a small shop owner etc.

Qualitative Data Interpretation

Proposed work		
	Number of units	Time requirements
Transcription of audio/video recordings	-	2 weeks
Developing the coding frame	-	2 weeks
Coding of transcripts	-	2 weeks
Interpretation and write-up	-	2 weeks

The focus groups will be carried out in each community's major language by teams of two moderators (moderator and co-moderator) trained to use a standard semi-structured interview guide. They discussions will be recorded (video and/or audio). At the end of each focus group, the moderators will compare notes and attend a debriefing through which they will assess the interaction between the participants and the reliability of the information obtained through the focus groups. Based on the recording, the focus group discussions will be transcribed by the same teams of moderators. The resulting transcripts will be then translated into English (verbatim translation) and will be analysed. The methodology used for the analysis of the transcripts will be the frame analysis. Thus, taking into consideration the structure of the focus group guide, the analysis team will construct a coding matrix derived from the content of several transcripts. After developing the respective matrix, all the content of the transcripts will be coded. Using this method will allow SCL not only to analyse the information obtained from the quantitative perspective but also scrutinize the way in which key elements, concepts and issues are framed into the context of the discussions.

Analysis and Individual Level Modelling

Proposed work		
	Number of units	Time requirements
Data management and cleaning	-	2 weeks
Developing the weighting procedure	-	1 week
Generating descriptive statistics	-	2 weeks
Making predictor & driver models	-	2 week

The analysis will commence with the production of summary tables (frequencies and cross-tabulations) describing how different personal characteristics are associated with the chosen psychographics. This will provide the initial findings, but will also be used to put the results of the multivariate analyses in context. In carrying out the advanced multivariate analyses of the survey data SCL will use a multi-stage methodological approach. In the first stage SCL will use data reduction and classification techniques (such as cluster analysis or latent class analysis) to split respondents into different segments based on their psychographic characteristics. This will allow us to generate different profiles types. SCL will then apply multivariate regression techniques to identify the factors that are most associated with and have the best influence on, each type of profile. In the final stage, SCL will use the psychographic profiles as independent variables in models which aim to uncover the drivers of different behaviours (why people support PETRONAS, why they vote the way they do, etc.).

To provide results that are actionable and that can be easily used by the client to facilitate the change, SCL distinguishes between two types of independent variables. On one hand, there are drivers of attitude which SCL defines as factors that are under the control of the client (at least to some extent) and that can be modified by forces external to the person to achieve changes in the outcome behaviour. On the other hand, there are psychographic and demographic characteristics that SCL understands to be the personal to a given individual affecting the outcome variables, but cannot be modified by external stimuli.

Finally, SCL will use individual level psychographic profiles and aggregate them to community level. SCL can then combine this data with the aggregate data and the community survey in order to produce community profiles for all the communities in the two states of interest.

5.4 Deliverables: Formulation of Strategic Recommendations Set out in the Report

Proposed work		
	Number of units	Time requirements
Data interpretation	-	2 weeks
Theory development	-	1 week
Strategic framework finalization	-	1 weeks
Write-up	-	2 week

A report outlining the research that has been undertaken by SCL will be delivered to the client. The report will delineate the means and methods employed by SCL staff in obtaining quantitative and qualitative data as well as its analysis. Each of the recommendations in the report that follow from this process will be submitted in the context of the goals of the client, the data obtained from the field and subsequent research findings. The scope and content of the report will reflect the objectives of PETRONAS in Sabah and Sarawak. Likely elements of the report will include a contextual overview of trends within the areas in question, a description of data gathering methodologies, a discussion of analytical methods along with assumptions made therein, and as a result of the above, a series of strategic recommendations based on the data collected.

The fundamental purpose of the report will be to translate the quantitative and qualitative data analyses into a series of scientifically informed actionable policies/strategy recommendation enabling PETRONAS to achieve measurable change. Ultimately, the strategic recommendations set out in the report will guide the use of the CRM platform.

Stage 2 – Community profiling and data amalgamation

5.5 Data collection

Community Survey

Proposed work		
	Number of units	Time requirements
Set up survey logistics for both states	-	4 weeks
Data collection in Sabah	500 communities	8 weeks
Data collection in Sarawak	1000 communities	12 weeks

In addition to carrying out the survey, which is aimed at measuring individual level psychographics and attitudes towards PETRONAS, SCL also envisages completing a comprehensive community assessment in both Sabah and Sarawak. SCL calls this process a 'community survey'. The aim of this exercise is to generate in-depth contextual, demographic, anthropologic and psychological data at the level of each community. The ultimate aim of combining this data with the **aggregate data** and with the **individual level psychographic** data is to generate psychographic profiles for each individual community in Sabah and Sarawak.

Aggregate Data Procurement From PETRONAS and Other Sources; and B3.1 Data Matching and Amalgamation

Proposed work		
	Number of units	Time requirements
Data requests to PETRONAS	-	4 weeks
Data sourcing for Census data	-	4 weeks
Data sourcing for Electoral data	-	4 weeks
Data organization and cataloguing	-	2 weeks

SCL will collect and use electoral results data (at polling level), census data and aggregated data from previous surveys, this will be augmented by internal PETRONAS data as appropriate. At the same time SCL will combine this data with the **community survey** and the **individual level psychographics** to generate community profiles. The data will be matched and amalgamated into a single data set and will be displayed in the generated dashboard.

5.6 Data Analysis– Predictive Analytics

Proposed work		
	Number of units	Time requirements
Data cleaning	-	4 weeks
Data matching	-	4 weeks
Data amalgamation: development of data base architecture	-	6 weeks
Development, testing and iterating of prediction algorithm	-	6 weeks

Modern, science-based campaigning makes use of new techniques, such as community-specific messaging to be transmitted with high precision to selected areas. Such techniques are recommended because of their high effectiveness and economic efficiency (the limited resources of the campaign can be precisely directed to the areas where they would have the biggest impact based on cost – ROI calculation). Such techniques often require a wealth of data and SCL has developed a proprietary methodology through which it can generate such information for the wider population by extending measurements taken on population subsets.

In essence, by using the SCL proprietary data analytics framework a set of community psychographic scores for all communities in the states of Sabah and Sarawak can be delivered. This will be achieved by combining the data from:

1. Individual level survey (psychographic scores)
2. Community survey (contextual, demographic data for each community)
3. Data provided by PETRONAS
4. Electoral data
5. Census data

SCL methodological process and steps are illustrated below:

1. SCL shall collect individual level survey data on the psychographic measures of interest for a very small part of the population. This will be aggregated at community level to compute the psychographic score for the each community in which individual level surveys were conducted.
2. At the same time SCL will also collect data on contextual elements. In this case what is of interest is the “universe” of communities in Sabah and Sarawak and thus the data is collected through the community survey. Through this step it is possible to collect contextual data for each community.
3. SCL will make use of additional aggregate data provided by PETRONAS, which will be matched and combined with electoral outcome data and granular census data. This data will usually be at a higher level than community level.
4. SCL will combine and match all three data types into a single grand data file system creating a single combined record set per community.
5. The aim is to produce a predicted community psychographic score for each community in Sabah and Sarawak. As such, in the next stage 75% of the community profiles generated by the individual survey will be randomly selected and matched with the community records and aggregate data. Using the matched dataset SCL will build a prediction algorithm (using one or more statistical techniques such as linear or logistic regression, random forests or neural networks) to predict the psychographic score of these communities (i.e. the score we obtained through the individual surveys).
6. To ensure the quality of SCL predictions as well as to understand the error patterns, SCL will test the predictive algorithm by using community data and aggregate data to predict the psychographic score of the remaining 25% of the communities that the individual level survey will have generate profiles for.
7. Once the prediction algorithm is delineated, SCL will generate psychographic scores for all the remaining communities in Sabah and Sarawak by using the community survey and the aggregate data.
8. This entire process is interactive and SCL often sequentially builds on models to improve prediction as data becomes more available.

5.7 Deliverables – Community profiles

Proposed work		
	Number of units	Time requirements
Generation of final community scores and display	-	2 weeks

Following the process outlined above SCL will generate community scores for each and every community in Sabah and Sarawak which we will then represent in a geo and caves format. (Please see the section below).

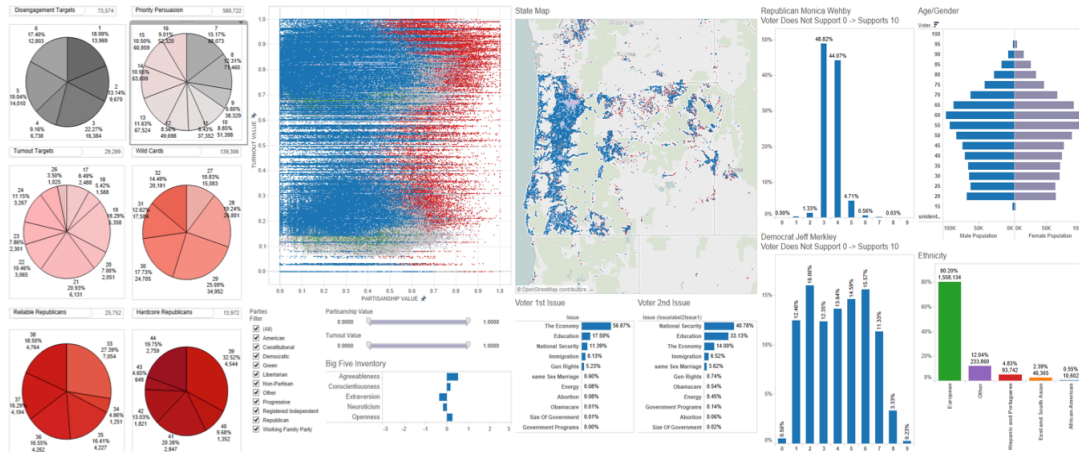
5.8 Deliverables – Dashboard and CRM

Proposed work		
	Number of units	Time requirements
Development of dashboard based on user requirements	-	3 weeks
Development and user acceptance testing of the CRM platform	-	6 weeks

The community profiles and the amalgamated data will be included and displayed through interactive dashboards and the CRM platform.

The Dashboard

The dashboard will display the interactive results of the community survey, illustrating the distribution of communities by profile. (See example below) By including geo display (map) and psychographic filters, the client will be able to observe the geographic dispersion of communities that share the selected characteristics.



The CRM Platform



The CRM platform will store and organize the amalgamated dataset and make it accessible to the client as and when needed via any type of device. After logging in through a secure portal the user will be able to select specified list of communities based on the characteristics he/she specifies. Once the list of communities is generated based on a query, it can be downloaded from the system into a .csv file (see example), or direct action can be taken from within the platform, such as: bulk sms; bulk email, robodialing, etc. The use of the CRM will be guided by the strategic recommendations SCL delivers in Stage 1. The full functionality of the CRM comprises of:



PSYCHOGRAPHIC PROFILING AND DIAGNOSTICS:

Delve well beyond traditional research to understand the underlying psychological motivators of behaviour for each societal target segment.



CAMPAIGN DASHBOARD:

A real-time display that shows daily/weekly targets, canvassing/messaging results, complete activity logging, detailed campaign metrics, and top performers.



SCHEDULING:

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



PHONE BANKING:

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



QUERY BUILDER:

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



TURF CUTTING / CANVASSING:

Narrow down your targeted lists to specific communities and areas for optimal canvassing. Add instructions for canvassers and print paper maps and lists, or send to the SCL app.



GROUPS AND TAGS:

Build static and dynamic lists to assign or tag individuals; or for use in canvassing, emailing and phone banking.



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.



AUTOMATED CALLING / IVR POLLING:

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



Bulk SMS (Texting):

Send single or mass SMS messages to target individuals or groups.



Social Blasts:

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

The Potential Layout of the CRM is Exemplified Figures Below:

Figure 1. – Login Page

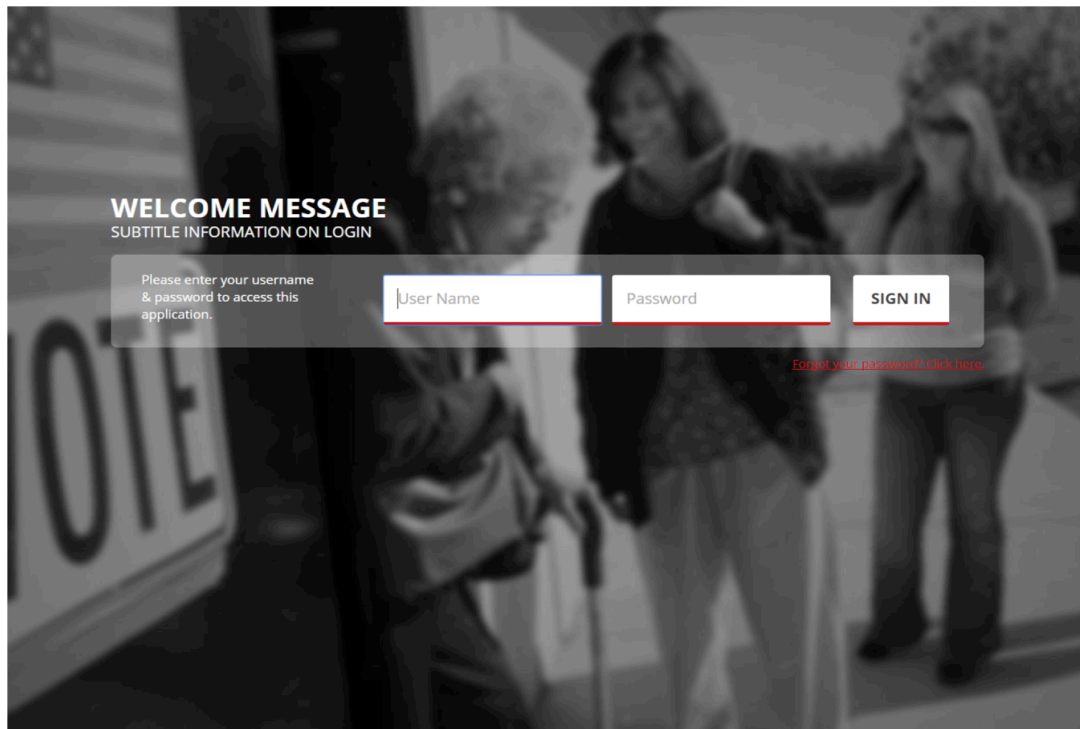


Figure 2. – Selection of Psychographic Target

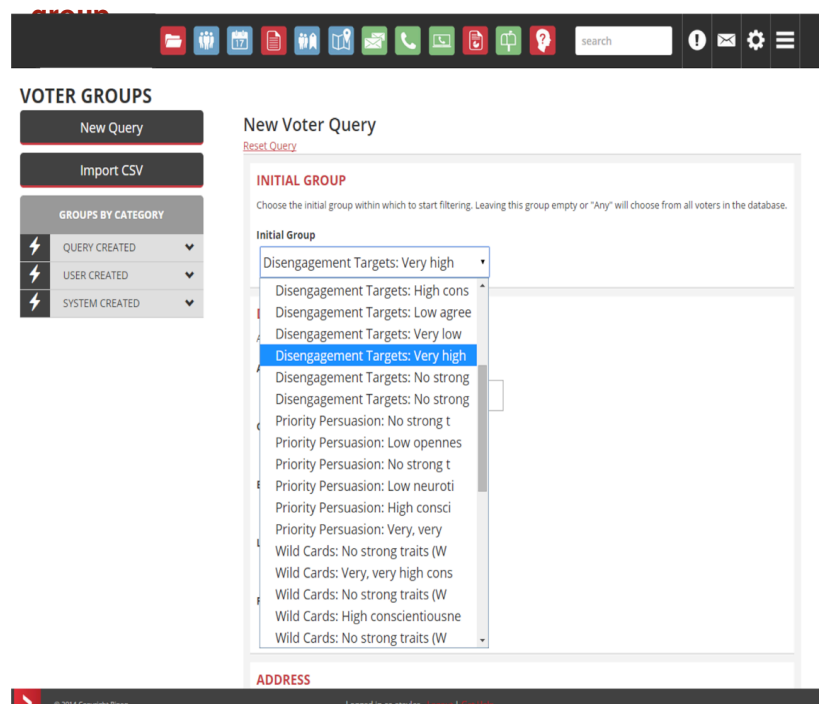


Figure 3. – Selecting Additional Filters

VOTER GROUPS

New Query

Import CSV

GROUPS BY CATEGORY

QUERY CREATED

USER CREATED

SYSTEM CREATED

New Voter Query

[Reset Query](#)

INITIAL GROUP

Choose the initial group within which to start filtering. Leaving this group empty or "Any" will choose from all voters in the database.

Initial Group

All Voters

DEMOGRAPHICS

Any fields left blank will be omitted from the search.

Age

Any

Gender

Any Gender

Ethnicity

Any Ethnicity

Language preference

Any Language Preference

Partisanship

Any Partisanship

ADDRESS

County

All Counties

City

Any City

Precinct

All Precincts

PERSONALITY SCORES

Any fields left blank will be omitted from the search.

Available Scores

Add Score

RESPONSES

Choose the survey members of this group must have taken, a question, and optionally a specific answer (if appropriate)

© 2014 Copyright Roper | Logged in as stayler - Logout | Help

Figure 4. –Obtaining the Individual Target List

VOTER GROUPS

New Query

Import CSV

GROUPS BY CATEGORY

QUERY CREATED

USER CREATED

Aggregate IQ members

voters that were not ema...

Just Tim

batch group number 3

SYSTEM CREATED

voters that were not email

Search Group

Message

Canvass

Generate CSV file

Delete

Group Size: 1688393 (Only 500 shown)

Description: This is a temp group that will contain people who were not emailed

Gary Karr

Jerry Maier

James Rabeneck

Robert Keaton

Terry Bullock

August Gardner

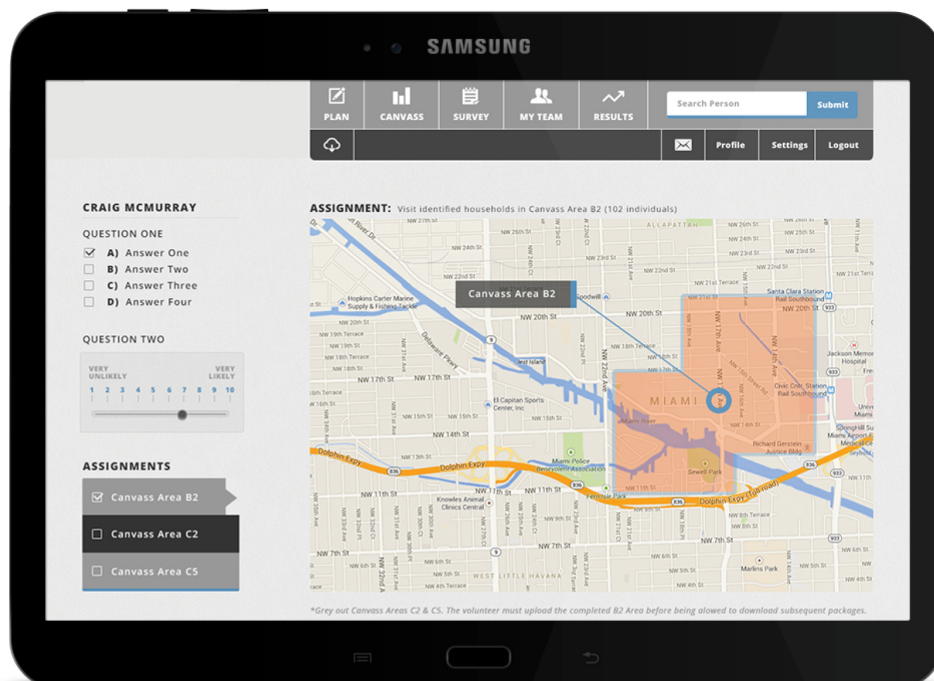
Robert Deberry

Keith Price

Figure 5. – Example of Downloaded .csv Files with Additional Information on the Targets

Voters_State	VoterID	Voters_FirstName	Voters_LastName	address	zip
2452078	LALAR155719362	Mary	Taylor	43 Elm Ln Dewitt	72042
2447170	LALAR156260310	Sharon	Tanksley	1068 Highway 33 Casscoe	72026
2445589	LALAR156337596	Jewel	Cokes	1588 Highway 33 Casscoe	72026
2449798	LALAR155629947	Amy	Erstine	91 Clearpoint Ln Stuttgart	72160
2446768	LALAR156574546	Lisa	Mitchell	18 F And N Ln Stuttgart	72160
2450166	LALAR156333587	Rita	Manis	303 E Cross St Dewitt	72042
3416122	LALAR155667246	Hazel	Wyatt	703 E Cross St Dewitt	72042
2451304	LALAR156400777	Patricia	Bronson	803 E Gibson Ave Dewitt	72042
2446458	LALAR156404109	Linda	Harris	423 E Halliburton Ave Dewitt	72042
2445046	LALAR156083856	Dorothy	London	201 Schallhorn St Apt 2 Dewitt	72042
2453176	LALAR156162549	Hazel	Smith	621 W 5th St Dewitt	72042
2449902	LALAR156609066	Bridgett	Jones	501 W 1st St Apt 3A Stuttgart	72160
3514519	LALAR156510994	Clevie	Wright	1011 E 2nd St Stuttgart	72160
3379030	LALAR156464995	Betty	McCoy	408 W 2nd St Stuttgart	72160
2446799	LALAR155694095	Emma	Jackson	426 W 3rd St Stuttgart	72160
2451779	LALAR155999202	Alice	Browley	611 W 3rd St Stuttgart	72160
2458356	LALAR156519132	Mae	Clingman	808 W 3rd St Stuttgart	72160
2450429	LALAR156527844	Marilyn	Clingmon	808 W 4th St Stuttgart	72160
2450429	LALAR156527844	Marilyn	Clingmon	808 W 4th St Stuttgart	72160

Figure 6. – Displaying Communities by Psychographic Profile on an Interactive Map (Turf Cutting Functionality)





Appendices

6. Appendix A: Budgets

PETRONAS Expenditure: Research, Consultancy and ICT Capabilities							
Task	Components	SCL Unit COST	Number of Units	Days	Days In- Country	In-country cost	Cost
Phase 1: Research Design							
Preliminary Research Costs							
	Project Director	\$1,000.00	2	25	18	\$6,300.00	\$56,300
	Research Director	\$1,000.00	1	10	5	\$1,750.00	\$11,750
	Project Operations Manager	\$715.00	1	30	25	\$8,750.00	\$30,200
	Project Research Manager	\$715.00	1	40	10	\$3,500.00	\$32,100
	Chief Data Scientist	\$950.00	1	15	0	\$0.00	\$14,250
	Desk-Based Researcher	\$600.00	2	50	0	\$0.00	\$60,000
	Analyst - Malaysia	\$445.00	1	25	5	\$1,750.00	\$12,875
	Project Assistant	\$238.00	4	45	0	\$0.00	\$42,840
	Expert Interviews	\$175.00	15	1	0	\$0.00	\$2,625
	Miscellaneous costs*	\$4,500.00	9	1	0	\$0.00	\$40,500
	Sub-Total						\$303,440
*Including travel documents, airline fares and insurance							
Pilot & Test Research Instruments							
	Analyst - Experimental Psychology	\$665.00	2	30	0	\$0.00	\$39,900
	Analyst - Sociology	\$665.00	2	30	0	\$0.00	\$39,900
	Instrument Translation	\$475.00	5	5	0	\$0.00	\$11,875
	Instrument Testing & Refinement***	\$35,000.00	1	1	0	\$0.00	\$35,000
	Sub-Total						\$126,675
***Including outsourcing data collection and SCL labour costs							
Aggregate Data Procurement							
	Secondary Data Acquisition	\$35,000.00	1	1	0	\$0.00	\$35,000
	Sub-Total						\$35,000

6. Appendix A: Budgets

PETRONAS Expenditure: Research, Consultancy and ICT Capabilities							
Task	Components	SCL Unit COST	Number of Units	Days	Days In- Country	In-country cost	Cost
Phase 2: Data Collection							
<i>SCL Research Staff</i>							
	Project Director	\$1,000.00	2	40	35	\$12,250.00	\$92,250
	Research Director	\$1,000.00	1	10	10	\$3,500.00	\$13,500
	Project Operations Manager	\$715.00	1	40	25	\$8,750.00	\$37,350
	Project Research Manager	\$715.00	1	40	20	\$7,000.00	\$35,600
	Qualitative Research Coordinator	\$715.00	1	45	45	\$15,750.00	\$47,925
	Local Coordination & Support Staff	\$87.50	6	60	0	\$0.00	\$31,500
	Project Assistant	\$238.00	4	45	0	\$0.00	\$42,840
	Miscellaneous costs*	\$4,500.00	10	1	0	\$0.00	\$45,000
	Field Research Costs	\$172.50	2	80	0	\$0.00	\$27,600
	Sub-Total						\$373,565
*Including travel documents, airline fares and insurance							
<i>Sabah (Kimanis, Papar, Tawau)</i>							
	Individual Quantitative Survey	\$40.25	5,000	1	0	\$0.00	\$201,250
	Social Network Analysis	\$40.25	1,000	1	0	\$0.00	\$40,250
	Community Survey	\$57.50	500	1	0	\$0.00	\$28,750
	Focus Groups	\$2,150.50	10	1	0	\$0.00	\$21,505
	Sub-Total						\$291,755

6. Appendix A: Budgets

<i>Sarawak (Kuching, Bintulu, Mukah, Miri)</i>						
Individual Quantitative Survey	\$40.25	7,000	1	0	\$0.00	\$281,750
Social Network Analysis	\$40.25	1,000	1	0	\$0.00	\$40,250
Community Survey	\$57.50	1,000	1	0	\$0.00	\$57,500
Focus Groups	\$2,150.50	10	1	0	\$0.00	\$21,505
Sub-Total						\$401,005

<i>ICT Equipment & Logistics</i>						
Video Recording & Delivery	\$30.00	20	1	0	\$0.00	\$600
Qualitative Data Coding	\$345.00	20	1	0	\$0.00	\$6,900
Telecommunications	\$11,500.00	5	1	0	\$0.00	\$57,500
Tablet purchase	\$345.00	250	1	0	\$0.00	\$86,250
Software Licence (5k responses)	\$5,750.00	4	1	0	\$0.00	\$23,000
Domestic Flights	\$230.00	35	1	0	\$0.00	\$8,050
Office Consumables	\$3,450.00	1	1	0	\$0.00	\$3,450
Sub-Total						\$185,750

6. Appendix A: Budgets

PETRONAS Expenditure: Research, Consultancy and ICT Capabilities							
Task	Components	SCL Unit COST	Number of Units	Days	Days In- Country	In-country cost	Cost
Phase 3: Data Analysis							
Predictive Analytics - Data Amalgamation & Modelling							
	Chief Data Scientist	\$950.00	1	5	0	\$0.00	\$4,750
	Quantitative Data Specialist	\$950.00	1	5	0	\$0.00	\$4,750
	Data Architect	\$950.00	1	10	0	\$0.00	\$9,500
	Data Analyst	\$385.00	2	15	0	\$0.00	\$11,550
	Sub-Total						\$30,550
Qualitative Data Interpretation & Influencer Identification							
	Chief Data Scientist	\$950.00	1	5	0	\$0.00	\$4,750
	Analyst - Experimental Psychology	\$665.00	1	10	0	\$0.00	\$6,650
	Analyst - Sociology	\$665.00	1	10	0	\$0.00	\$6,650
	Analyst - Malaysia	\$445.00	1	10	0	\$0.00	\$4,450
	Support Staff	\$300.00	4	10	0	\$0.00	\$12,000
	Sub-Total						\$34,500
Platform & Dashboard Development							
		\$150,000.0					
	CRM Platform**	0	1	1	0	\$0.00	\$150,000
	Sub-Total						\$150,000

**Does not reflect associated hosting costs.

6. Appendix A: Budgets

PETRONAS Expenditure: Research, Consultancy and ICT Capabilities							
Task	Components	SCL Unit COST	Number of Units	Days	Days In- Country	In-country cost	Cost
Phase 4: Project Delivery							
<i>Strategic Recommendations</i>							
	Project Director	\$1,000.00	2	35	17	\$5,950.00	\$75,950
	Research Director	\$1,000.00	1	20	0	\$0.00	\$20,000
	Project Operations Manager	\$715.00	1	20	5	\$1,750.00	\$16,050
	Project Research Manager	\$715.00	1	40	10	\$3,500.00	\$32,100
	Analyst - Experimental Psychology	\$665.00	1	10	0	\$0.00	\$6,650
	Analyst - Sociology	\$665.00	1	10	0	\$0.00	\$6,650
	Analyst - Malaysia	\$445.00	1	10	0	\$0.00	\$4,450
	Desk-Based Researcher	\$600.00	2	30	0	\$0.00	\$36,000
	Support Staff	\$300.00	4	10	0	\$0.00	\$12,000
	Miscellaneous costs*	\$4,500.00	4	1	0	\$0.00	\$18,000
	Sub-Total						\$209,850
*Including travel documents, airline fares and insurance							
<i>Data Visualisation</i>							
	Chief Data Scientist	\$950.00	1	5	0	\$0.00	\$4,750
	Quantitative Data Specialist	\$950.00	1	20	0	\$0.00	\$19,000
	Sub-Total						\$23,750
Total							\$2,165,840

7. Appendix B: SCL's Strategic Communications Roadmap

The following pages illustrate how SCL and PETRONAS can further build on the success of this project. The below sections and framework diagrams briefly outline phases two and three. Taken together, these three distinct phases of the project constitute SCL's roadmap to more effective and successful strategic communications campaigns.

Should PETRONAS contract for the second phase of this project, SCL will capitalise on the community profiling completed in the first phase to design communication and messaging campaigns.

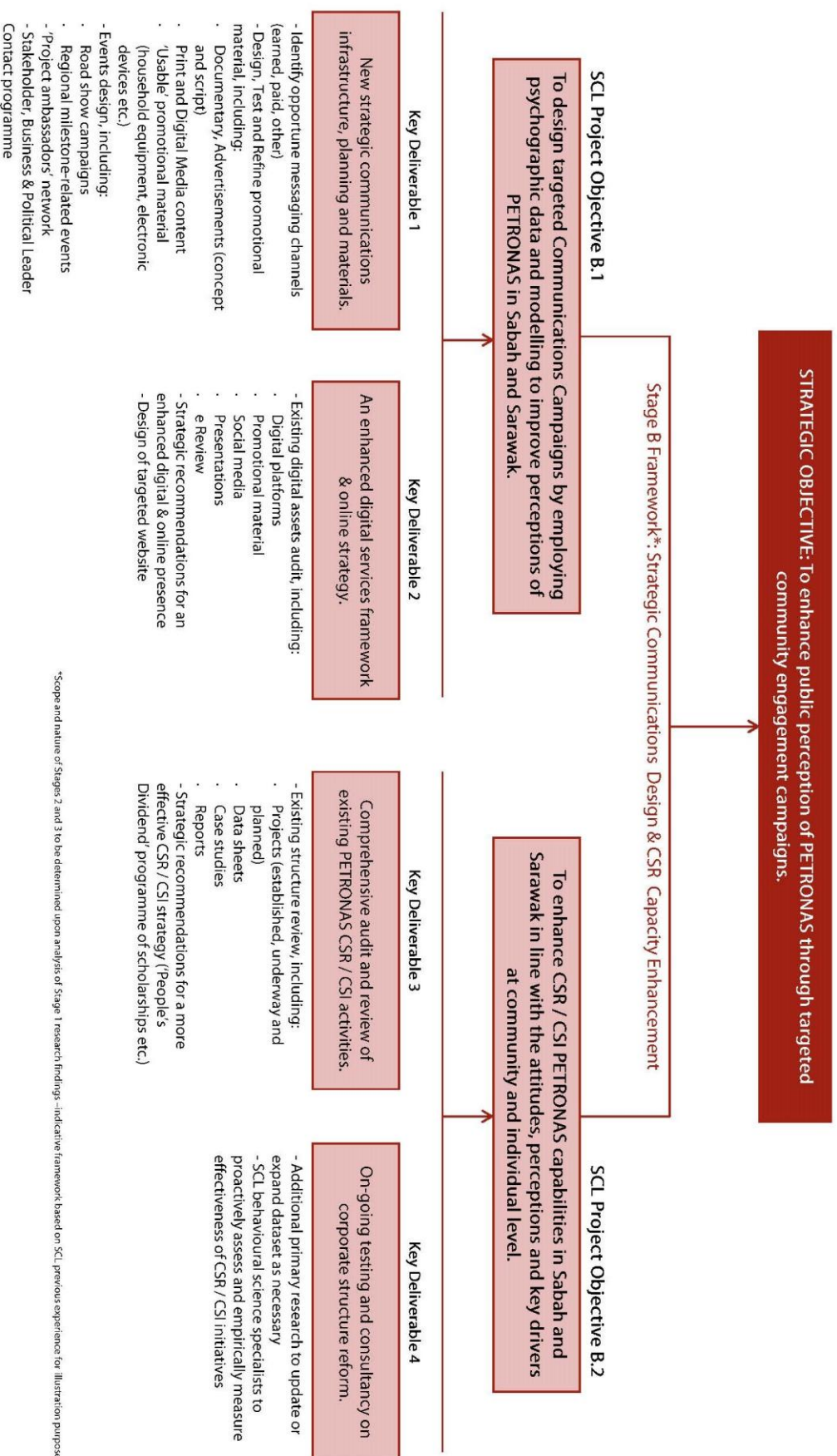
Phase two will deliver capacity building within PETRONAS. The key objectives are:

- The design of Targeted Communications Campaigns by employing psychographic data and modeling to improve perceptions of PETRONAS in Sabah and Sarawak. By the end of the second phase, PETRONAS will have gained an improved understanding of the audiences to whom it must message (as completed in stage one) coupled with the ability to utilise this understanding in planning its communications.
- To enhance CSR / CSI PETRONAS capabilities in Sabah and Sarawak in line with the attitudes, perceptions and key drivers of target audiences at both the community and individual level. PETRONAS will gain an in-depth understanding of the ways in which its corporate social responsibility and investment programmes impact the people of Sabah and Sarawak to better align with both community needs and overall company objectives.

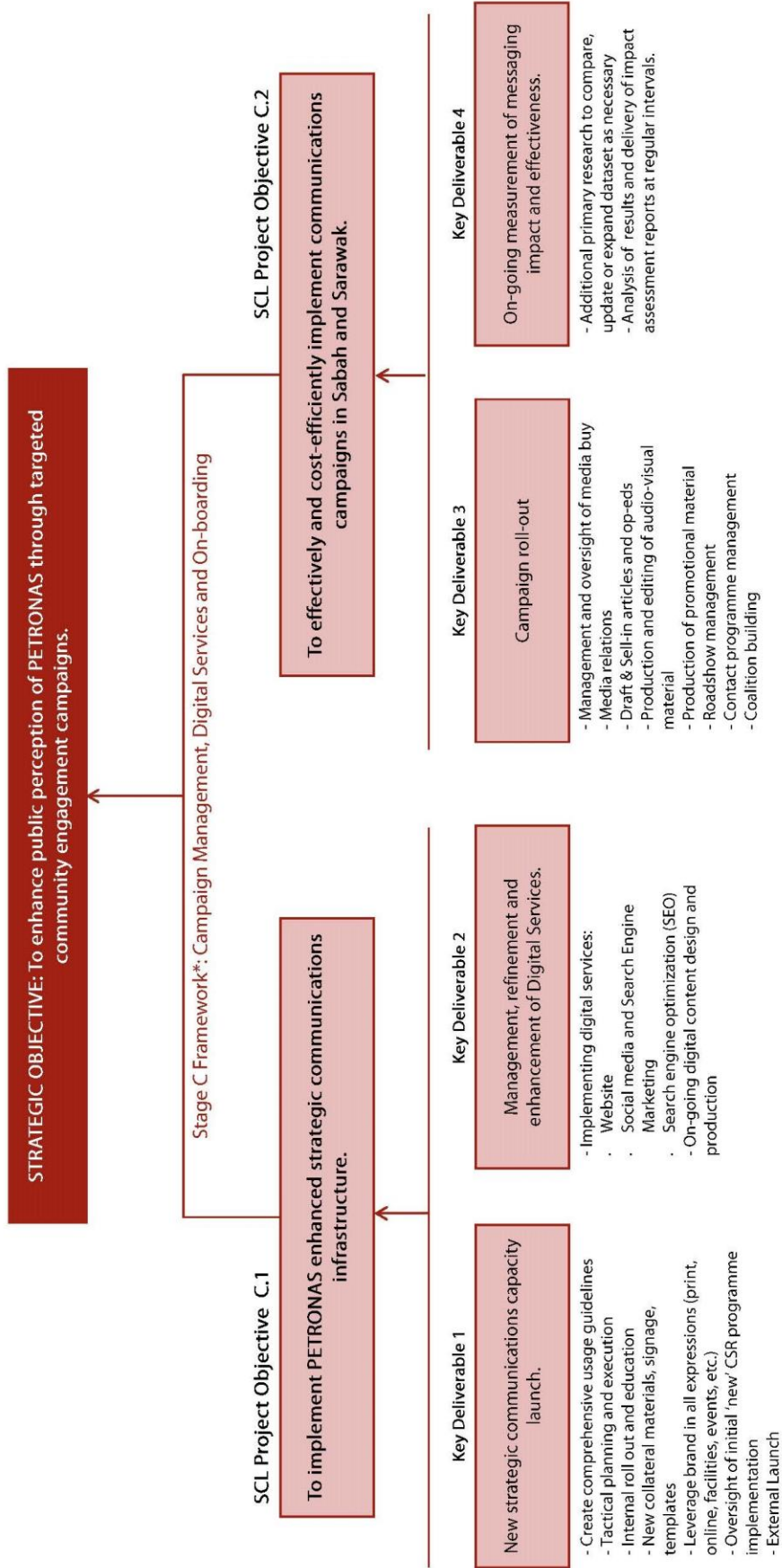
Phase three is the final step in the proposed SCL undertaking for PETRONAS, and follows on from the activities of stage two. Phase three would again see SCL pursue two primary objectives:

- ~~Implement~~ Implement the enhanced strategic communications infrastructure. SCL will capacitate appropriate units and staff within PETRONAS to deliver its strategic communications messages. SCL would provide the requisite training and instruction to PETRONAS staff, so that by the end of the project they are equipped to utilise the tools delivered in phases one and two during campaign execution.
- Effectively and efficiently implement communications campaigns in Sabah and Sarawak. Stage three is also concerned with execution and the subsequent monitoring of PETRONAS' communications efforts. This final phase of the project will enable PETRONAS to produce effective messaging campaigns based on insights garnered from the previous two phases.

7.1 Phase Two Project Framework



7.2 Phase Three Project Framework



*Scope and nature of Stages 2 and 3 to be determined upon analysis of Stage 1 research findings – indicative framework based on SCL previous experience for illustration purposes.

8. Appendix C: Project Team

8.1 Executive Oversight

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 an ecru and 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.

8.2 Core Project Team

Ceris Bailes – SCL Director of Projects – Project Director Malaysia

Ceris is a hugely experienced project coordinator with a range of skills encompassing project and emergency management, impact monitoring, stakeholder coordination and operational delivery. A former commissioned officer in the Royal Air Force and diplomat with the UK's Foreign and Commonwealth Office, Ceris' international experience in the humanitarian sector at senior management level includes working at both HQ and field level in key management roles in countries as diverse as Afghanistan, the USA, Bosnia Herzegovina, Pakistan and Democratic Republic of Congo with organisations including Merlin, Catholic Relief Services and the International Rescue Committee. Since 2013, Ceris has overseen SCL's health and socio-political research project in Ghana, managing all aspects of the project and dividing her time between the London and Accra offices.

Shahid Shayaa – Head of SCL Malaysia Office

Shahid has extensive knowledge and experience in business and management consultancy from his days with Accenture Malaysia and the Malaysia Airlines Transformation Management Office. He was involved in large scale transformation projects in the private and public sectors in his capacity as Special Officer to the CEO of Malaysia Airlines and in the Prime Minister's Department Dato' Seri Idris Jala in the Performance Management Delivery Unit (PEMANDU). Shahid currently leads a team of analysts and project managers specialising in digital media analytics and reputational management for clients such as PETRONAS and others in the public education sector, airport operator and engineering based infrastructure services. Keenly aware of the need to have an in-depth understanding of various stakeholders in order to produce an effective communications campaign, Shahid partnered with SCL to establish SCL Malaysia.

Jon Hassain – Project Operations Manager

Jon has most recently been fulfilling the role of SCL Ghana's Operations Manager with responsibility for a complex nationwide operations structure in support of this extensive research project. A former commissioned officer in the Corps of Royal Engineers, Jon joined SCL in 2014 bringing a wealth of experience in project operations management. During his 7 years in the Army, Jon managed several military construction projects in Germany and Iraq - most notably the construction of a training facility for the Iraqi Police Academy. In 2010 he became the Operations Officer for a bomb disposal Squadron that supported the UK's domestic security services, providing specialist military capabilities to the 2012 Olympic Games. His final military posting in 2013 was as the Operations Officer for the Explosive Ordnance Task Force in Helmand, Afghanistan. Prior to joining the Army, Jon worked as a Physics teacher in the UK and Qatar.

Marius Mosoreanu – Project Research Manager

Marius Mosoreanu specialises in studying the effects of diversity upon generalised trust, public participation in public services and social capital. Marius' background is in political science with a strong focus on a quantitative approach towards various political phenomena, ranging from issues like voting behaviour and political participation to democratisation and political ideologies. During his career he has overseen several surveys and various quantitative social researches, being involved in all the phases of the research. Proficient with SPSS, STATA and other software packages common for quantitative research, he also has teaching experience holding seminars on SPSS, Game Theory and Research Design at the Babes-Bolyai University's Political Science and Public Administration Department in Romania. Marius acted as Deputy Director of Research for SCL's Ghana project focusing specifically on the practical implementation of the research plan on the ground.

Syed Khalid – Qualitative Research Coordinator

Khalid's wealth of experience in multinationals and corporations such as PETRONAS Dagangan, Danaharta, Ambank, Chevron and DHL has provided him with a huge range of skills and knowledge of the operations and strategies required to ensure effectiveness in a project's implementation. Khalid is tremendously resourceful, and is an ardent observer of online trends and national issues. He has also led a digital media analytics and reputation management team for the public education sector and has the invaluable experience of leading the online reputation management team for PETRONAS. Khalid recently founded and manages a news aggregator portal.

Fatin Nadia – Desk Based Researcher

Fatin started her career as a Producer in the advertising, stills photography production and the audio post-production industry in Malaysia and Indonesia for several years. This experience provides her with an appreciation for detail and a keen understanding of the importance of strategic communications. She has a background in Mass Communications and a strong passion for digital media, its strategy and purpose. As a digital media analyst, Fatin has identified, monitored and reported extensively on the various issues affecting PETRONAS and its internal stakeholders, which includes providing the sentiment analysis and insight for a

number of key topics. She has also provided the digital media analytics, insight, and was in charge of the reputation management team for an airport operator client.

Ben Pang – Project Assistant

Ben has a strong background in coordination and management from his years in Shell Malaysia's downstream business, and this instilled in him a tenacious eye for detail and professionalism in the management and execution of projects. A former law graduate, Ben is well versed in the socio-political affairs of Malaysia and is highly adept in digital media reputation management. He has led a team for the digital media analytics, insight, social media training and reputation management for an airport operator, an engineering based infrastructure services client, an Islamic banking training institute and a Malaysian political figure.

8.3 SCL UK Team

Kieran Ward – Senior Communications Director (advisory)

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 Social 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.

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 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 acted as communications manager and consultant for several campaigns in Eastern Europe.

Dr. Tadas Jucikas – Chief Data Scientist

Tadas holds a PhD in Computational Biology from the University of Cambridge. There he developed a novel platform for high-throughput quantitative behaviour analysis that enabled description of novel genes important in neuronal function, and subsequently published his results in Nature, one of academia's most prestigious scientific journals. Tadas is SCL's resident

'Big Data' expert and is a leading practitioner in using Artificial Intelligence to create composite algorithms capable of sorting, and finding actionable patterns in, vast reams of seemingly unrelated data. In addition to this, Tadas develops tools through which non-expert users can access, understand and apply our data sets and findings to a vast range of areas ranging from marketing to project finance and politics.

Dr. Tobias Kloepper – Data Architect

Tobias is a mathematician with a focus on creating innovative solutions to practical problems. Having professional experience gained in a number of prestigious institutions including the Max-Planck Institute for Biophysical Chemistry, Goettingen Germany, the Laboratory of Molecular Biology, Cambridge UK, and the Dunn School of Pathology, Oxford UK, he brings a unique perspective on big data analytics to the work of SCL. His work to date has covered modelling of biological processes, big data processing and analytics in biological sciences as well as studying the evolution of cellular processes. This provides him with a unique perspective on addressing the challenges of designing and implementing analytical pipelines for big data. Tobias is responsible for the design, implementation and deployment of several bespoke SCL technological platforms, having played both a consultancy and management role during their development.

Dr. Brent Clickard – Experimental Psychology Analyst

Brent leads on applying the latest insights from Experimental Psychology to our research. His PhD from the University of Cambridge is in rhetorical analysis, socio-political ideology, psycholinguistics and cultural identity systems. To date his work has been applied to the car and music industries, as well as to large political and socio-economic studies of public behaviour in the United States, the Caribbean and Africa.

Dr. Alex Tayler – Quantitative Data Specialist

Alexander Taylor is a Lead 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.

Dr. Jack Gillet – Quantitative Data Specialist

Jack Gillett is co-chief Data Scientist at SCL jointly responsible for our analytics platform, delivering insight to clients from large commercial, found, and unstructured datasets. Before working at SCL, Jack spent several years as a manager at the Royal Bank of Scotland, managing projects involving pricing exotic derivatives and calculating pricing implications of default risk from the bank's counter-parties. Jack has a PhD in Low Temperature Physics from Trinity College, Cambridge where he also read Natural Sciences at undergraduate.

9. Appendix D: Case Studies

9.1 Case Studies

See below for a selection of SCL projects throughout the past two decades:

2007 - 2014

Fracking – Colorado, USA

As part of a large scale issues advocacy campaign, we used social media to directly probe how 68,400 people in Colorado feel about fracking. This sample was then used to train a model to predict the likely position on this issue for 2.8 M people in that state. By segmenting the population of Colorado on the basis of demographics, psychographics and their opinion about the issue, we enabled our client to counter many fears people have about fracking, and effectively promote an increasingly important aspect of their business.

UK Car Plant – Industrial Action

The SCL group was contracted by the owners of a large automotive distribution centre in the UK to advise on communications during a period of industrial unrest. The dispute centered on a number of issues related to working conditions. The relationship between plant personnel and management had deteriorated to a level where talks when they did occur were fractious and unproductive. Given the sensitivity of the scenario communications with both the opposition and external stakeholders were key to resolving the dispute. SCL was able to profile the major groups involved and offer suggestions to the client on the best methods of communication, along with the shape and form that such messaging should take. This profiling effort concentrated on the staff but also encompassed outside groups such as the media and social organisations that had influence on the workers. In feedback from the client SCL was particularly praised for the insight it provided into the reasons for personnel grievances as well as the help it delivered in managing the media during sensitive negotiations.

Ghana - Assessing Contemporary Behaviour and Attitudes to Healthcare

SCL is currently in the midst of undertaking one of the largest socio-political research projects ever conducted in West Africa. The work consists of two discrete political and public health elements. The political element is testing the attitudes and perceptions of the population towards contemporary issues faced in Ghana and public confidence in the capacity and competence of the current administration to implement appropriate and timely solutions. The current level of satisfaction regarding the performance of the National Democratic Congress (NDC) at district, regional and national level is also tested and the research incorporates how this may translate into future electoral success. The public health element tested knowledge, perceptions, attitudes and current health-related behaviours of the population. The main dimensions of this focus are the public perceptions of access to health infrastructure and of

service delivery, the cost of healthcare and the ways in which people finance health interventions, and the contextual triggers that shape the preferences of people in terms of choosing traditional over western medical interventions. Both elements of the research will result in a detailed baseline study that will allow development of both political and health strategy in addition to the creation of a bespoke dashboard that will be an enduring and dynamic data infrastructure asset.

Presidential Election: Kenya

The Kenyan presidential Election of 2012 was amongst the largest ever undertaken by SCL. To aid its client SCL implemented a bespoke set of activities to leverage his personal popularity into support on the day of the ballot. In this case initiatives included a large electoral research study which profiled the Kenyan electorate, and on the basis of this work the segmentation of the population for targeted messaging efforts. SCL was particularly active in organising the youth section of the client's party, introducing to Kenya for the first time, a concerted social media engagement programme. The SCL insight that the youth cohort was an underutilised asset, one that could be highly influential when mobilised, was a key factor in the client's ultimate success.

Management & Analysis of Project Implementation Tracking Data (Reintegration component of South Sudan Disarmament, Demobilization and Reintegration Project); UNDP, South Sudan

This project was commissioned by UNDP South Sudan in July 2011. SCL Social was contracted to provide data management and analysis services to the UNDP, using data from the National DDR Program Implementation Tracking Survey. The survey was conducted across seven states in South Sudan where reintegration services were provided to ex-combatants (XCs) and women associated with armed forces (WAAFs). Using survey results from approximately 5,000 XCs and WAAFs, SCL Social was able to give feedback on data quality, and to examine the success of the reintegration program's service delivery. Overall, SCL Social found that social integration levels for XCs and WAAFs was fairly high, though economic reintegration lagged behind and varied by subgroup. After comprehensive analysis, SCL Social developed a set of recommendations for the UNDP in order to maximize the future effectiveness of the DDR program.

Pakistan: Peshawar; US Department of Defence

SCL Social was contracted to assess how technology would best be used to promote a forum for youth to engage in discussion on democratic governance. SCL Social evaluated the role that the Internet and cellular phone technologies play in Islamic radicalization processes in Peshawar. The aim of the project was to give data driven recommendations on how to reduce the utility of such technologies for violent extremist purposes. The approach included; Desk Based Research, contextual analysis, literacy analysis, qualitative interviews, guided questionnaires, online questionnaires, analysis of Internet histories and the use of a Facebook page. Findings showed that respondents were aware of and had at times interacted with, but were strongly opposed to extremist content. However, barriers to open discussion included fear and lack of channels through which views on democratic governance could be expressed.

Recommendations centred on behaviour change via the provision of forums and a clear government policy to support anti-terrorism and pro-democracy efforts.

Narcotic Smuggling and Human Trafficking, Mexico

SCL was commissioned to conduct a Target Audience Analysis in 13 target locations across Mexico. The objective of the project was to provide strategic and operational recommendations for strategic communication campaigns aimed at countering drug-related crime, corruption, human trafficking and public ambivalence toward drug trafficking cartels. In the space of five months, 1,800 Thematic Apperception Tests, 2,421 Guided Questionnaires and nearly 450 In-depth Interviews were conducted on four Primary Target Audiences and eleven Secondary Target Audiences. A further research phase, in the form of focus groups, was also conducted in 28 different urban areas to create tactical, highly localized recommendations in support of project objectives. Baseline data was collected during the quantitative data collection phase according to SCL's Measure of Effectiveness methodology.

2000 – 2007

Coys Auction House – Perception and Sales Analysis

SCL commercial was contracted by Coys to increase the value obtained from the auction of rare automobiles. SCL undertook a detailed study of their customer base and influential secondary audiences such as media publications concerned with the automotive trade. The study revealed that buyers in this market had a high level of sophistication and were unlikely to pay more for items than their current market value. With this in mind SCL suggested to Coys that they reposition themselves as not merely an auction house but also a museum concerned with the appreciation of classic cars. The strategy was to communicate that Coys were concerned with subjects such as history, heritage, performance and social value of classic vehicles, this then infused their products with these traits as well. Given that customers now perceived they were now not simply buying a car but a piece of history the volume of sales as well as their value increased dramatically. This project clearly demonstrated the role of subjective attitude and perception in buying decisions, even amongst the most specialized and knowledgeable of consumer groups.

Unilever – Frozen Food Customer Profiling

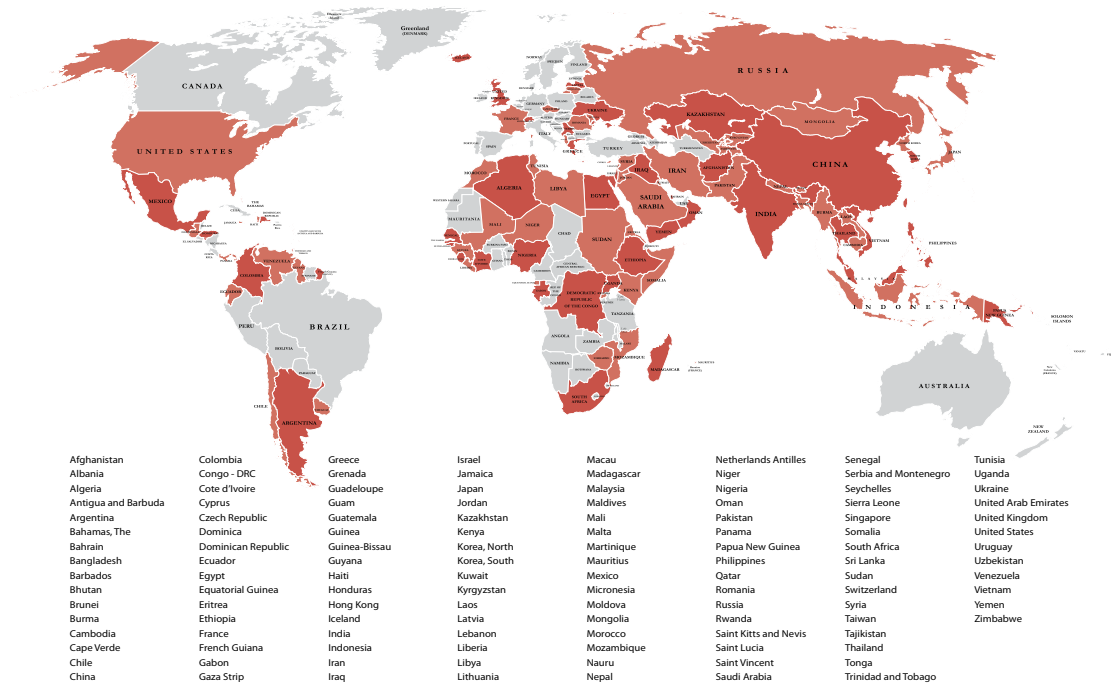
SCL was hired by a division of Unilever to recommend strategies to increase the sales of its frozen vegetable range. Unilever had found that despite increasing advertising spend sales of this range remained constant. This of course was identified as a problem by the client as its advertising team could not solve this problem of ineffectiveness. SCL profiled the habits and attitudes of the division's customer base through the use of various data modeling techniques, data in this case being readily available from the client and its distributors. SCL also undertook small-n studies to examine consumer behaviours in more depth. The key insight provided by SCL was that the vegetable range was a secondary decision in consumer purchasing, vegetables being seen as an accompaniment to meat or fish dishes. SCL therefore recommended that Unilever reduce its advertising spend on the vegetable range and increase it on prepared meat and fish meals, this would therefore have the benefit of increasing sales in both the ranges. The case demonstrates that an increased knowledge of public behaviours could be exploited to raise sales and the effectiveness on the messaging spend.

1990 - 2000

Lloyds of London; Investor Relations Campaign

One of the most significant early successes of the SCL group was its organisation of a concerted communications campaign targeting Investors in Lloyds of London. After severe losses the group was in an extremely precarious financial position with some commentators believing the institution was liable to collapse. SCL was contracted to engage with Investors and convince them to put forward further capital to ensure the Survival of the organisation. The rescue of Lloyds based in part on the work of SCL, and its success in the intervening years, is a key case study in the application of SCL techniques to the corporate arena.

9.2 Global Experience



10. Appendix E: References

SCL Reference by Rojo Mettle Nunoo, Former Deputy Minister of Health Ghana

SCL Social was engaged in Ghana to undertake an extensive nationwide research-led public health project. The target audience analysis generated by the project led to a series of policy adjustments and recommendations for behavioural change, helping us to identify both key negative health behaviours and also behavioural triggers to be used in future health communication. The SCL Social team, headed by Ceris Bailes, delivered a high quality product that was adapted to the specific cultural context of Ghana. The research undertaken not only responded to our needs, but also highlighted a number of other issues that were not initially within the scope of the project. Contact: Robertroj@gmail.com

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." Contact: SarahAnn.Connolly@homeoffice.x.gsi.gov.uk

Sandia National Laboratories (US Government Agency) Curtis Johnson – Project Manager

"SCL Social was commissioned to perform an in-depth behavior change study in relation to violent extremism in South and Southeast Asia. It was a multi-regional study spanning several countries in South Asia and had tight deadlines. Some of the major campaign strategies, which were produced as a result of SCL Social's research, included working with local Imams and other community-based organizations.

SCL Social's team were well trained and operated with the utmost professionalism. The complexity of conducting research in different countries was well managed and the analysis and recommendations were of the highest quality. I found SCL Social easy to work and communicate with, even when the teams were in the field. Communication with them was key and it was well managed from the start. I would happily recommend SCL Social and work with them again." Contact: cjohnso@sandia.gov

Njee Muturi, Solicitor-General of the Republic of Kenya and Former Campaign Manager, The National Alliance and Jubilee Coalition

This serves to confirm that the SCL Elections of No. 33 St. James Square, London, UK was contracted to give support to The National Alliance (TNA) Presidential election in Kenya between January 2013 to November 2013 in the areas of behavioural research, strategic advice, the development of campaign technological infrastructure and the training of personnel to manage the same. Together these served to give the party an edge in knowledge, organisation and communications to the point where TNA is the frontrunner in the forthcoming elections. We recommend the SCL Group to any organisation intent on mounting a successful campaign.

Yours faithfully,

Njee Muturi,
Solicitor-General of the Republic of Kenya

11. Appendix F: The Communications Capacity of SCL

11.1 Fundamentals of Communication

SCL feels that each client ought to take a decisive lead in the strategic planning of corporate communication. We suggest the development of short and long-term communication plans centered on the future agenda of the company leadership. The delivery of timely and effective communications through the marshalling of organisational resources is a path to the effective management of message delivery.

The creation and maintenance of positive working relationships with members of the press can be of great strategic value to any company. Moreover, rather than reliance on small numbers of PR staff cultivating personal relations with the press, or indeed being reliant on exterior PR agencies, with some effort clients can cultivate and maintain links to a wide circle of writers and broadcasters throughout the various media platforms. This not only creates direct bonds between the media and the client, but also permits the client to act as a central conduit for specific journalists seeking information.

Developing corporate-level relationships with media outlets will provide the client with alternative avenues to promote company initiatives, or potentially respond to negative mainstream media coverage. More than almost any other variable, the creation of amenable attitudes toward a client amongst both traditional and new media journalists will influence the scope and perspective of coverage granted to the organisation.

When there are unforeseen developments, it is critically important that company staff do not begin making conflicting public statements. As such, a central communications team must develop and maintain a list of influential staff and sympathetic activists that can be quickly notified about developments, and in turn supplied with fact sheets or talking points in defence of the organisation should they be contacted for a statement. This structure in the midst of a crisis situation will greatly help the client to maintain message order. A properly constructed communicative apparatus can provide an immediate point of advice for staff if they are unsure of Leadership policy attitudes during a problematic situation.

A comprehensive and accurate list of local media contacts should be developed and maintained by all clients. This list should include the names, phone numbers, email addresses and social media contact information of all print, radio, TV and online reporters, opinion columnists, broadcast producers, as well as amateur commentators with sufficient audiences. It should include local and regional media outlets as well as those in neighbouring states, relevant diaspora news and media publications, in addition to the local/regional offices for media organisations with a global presence such as the BBC, the Economist, Reuters, Associated Press and AFP, etc.

Each organisation should also attempt to build an information resource that can be used by the company to plan and execute future media campaigns. The collation of statistical data regarding business practices, company projects, organizational make up, national demographics, population, geography, socio-economic cleavages, and political allegiances

allows company leadership access to an information cache apt to be exploited for future media campaigns and public relations activities.

When possible clients should try to publicise upcoming corporate events, project launches, and sponsored activities. This should include writing media releases for these events and following up with journalists to encourage their attendance. In essence the client is tasked with raising the profile of positive events to give them greater public exposure, and thus promote the company message/policy/achievement central to the occasion. In promoting media coverage of events client should try to both coordinate internal publicity (party website, blog, newsletter) but also gain as great an exposure to external media (TV, radio, newspapers).

The client should, as part of its communications routine, continually seek to develop and update relevant content for later transmission and dissemination. This includes everything from constructing op-ed pieces for relevant company staff on important issues to press releases and media advisories, letters to the editor, fact sheets and “white papers” on key issues, as well as content for the corporate website (which should be reviewed and updated regularly). The client should also be prepared to develop non-written content, such as photos (for example, pictures of completed projects or photos of a press conference to post on the site later), video (e.g. video press releases or statements) and audio (e.g. radio broadcasts/interviews, public service announcements, and robo-calls).

Given the above, SCL endeavours to aid its clients in formulating the strategies and tactics that best help them cultivate the appropriate communicative ability. For some clients this may require the complete end-to-end development of a bespoke media apparatus, for others small amounts of capacity building or infrastructure may be all that is required. SCL offers a suite of services to aid clients in developing a solution that is right for them. While the services outlined below are merely indicative of the range of services offered by SCL, it gives a strong sense of the range and depth of provision that SCL can deliver.

Paid Media

- Selecting those channels with the deepest reach into Target Groups, the highest credibility and the best value for money given client objectives.
- Development of Paid Media Plans for client to ensure integration of all media streams in the service of overall organizational objectives
- Liaison with media buyers to facilitate implementation of paid media activities
- On-going review of paid media to ensure that achievement goals are reached in a timely fashion and that the alignment of such goals continues to meet client objectives

Earned Media

- Selecting those channels with the deepest reach into Target Groups, the highest credibility and the best value for money
- Development of client Earned Media Plan
- Identification of key journalists, media opinion leaders and outlets
- Management of exclusive journalistic access to facilitate positive media exposure of client operations

- Courting the opinion of certain journalists particularly those with industry or audience specific influence
- Invitation of key opinion leaders to client events, projects and gatherings with the effect that they will become more amenable to client projects
- Providing journalists with evidence supporting a positive perception of the client: statistical, photographic, qualitative etc.
- Identifying relevant events and success stories as well as information and facts about such instances. This with the goal of creating a repository of ready-made positive press pieces for later dissemination

Social Media

- Analysis and modelling of data on which social media outlets key groups employ and respond to most
- Setting out the ways in which social media can be utilised to gain influence over target audiences, the venues platforms that will be exploited, as well as advanced methods for optimizing message reception for the client
- Creation social media management structure incl. senior client liaison officers
- Selection of social media control team from client staff
- Construction of social media integration plan to support mainstream media efforts
- Implementation of data analytics plan to measure relevant social media metrics
- Message content creation and refinement for selected social media audiences

Tier One Advocacy:

It is suggested that all clients should develop a list of the best potential advocates willing to participate in media interviews when needed. Corporate officers will differ in their ability to successfully undertake interviews and appearances, as a consequence those more talented and media-savvy amid the company's ranks should be encouraged to gain increased exposure. We believe client's should also seek to work with reporters, TV producers and radio hosts to get party advocates on air whenever possible. Repeated exposure to well crafted, attentively presented messages, will facilitate a positive public mindset toward the client. The endeavour can be improved by producing media briefing packages for spokespeople due to be interviewed, as well as coaching them for appearances on each type of media platform.

- Recruitment: Initial candidate selection in each salient area/population sub-group
- Training of advocates to deliver client messaging in a professional manner
- Creation of an advocate command and control team
- Provision of regular content for advocates to fuel their media efforts on behalf of client
- Continuous assessment of advocate effectiveness with refinement of use as necessary

Tier Two Advocacy:

Tier two advocacy is one step removed from the client itself. Instead independent yet sympathetic advocates are selected and supported in espousing the opinions and positions of the client. In certain circumstances a degree of independence can add to the acceptance of a client position when championed by a second tier advocate. The social or professional position of second tier advocates can further add to the credence with which their message is

received amongst target audiences. Second tier advocates can be especially effective in areas that the client has previously not operated within or has suffered reputational damage in the past. Identification of potential second tier advocates includes those not directly associated with the client but nonetheless possessing credibility in target areas and amongst target audience groups.

- Recruitment of agreeable second tier advocates, both local and international
- Support and management of the second tier advocates through briefings, information packs, and invitation to client events and gatherings

11.2 Outcomes of Communications Development

Improved Public Perception

Public perceptions of corporate activities can be greatly improved through the proposed framework. Not only could efforts originate from the client to change public attitudes via content creation and dissemination, but also the monitoring aspect of the framework would allow senior organizational leaders to stay abreast of events related to key issues. It will also let the leadership observe long-term changes in the perception of relevant topics.

A Central Reference Point

A centralized and responsive communications system would also be able to provide a point of reference for staff and administrators to arrange complimentary responses that align with central corporate policy. More proactively should the press seek issue specific opinions from the company, the client's media and communications unit is likely to be their first point of enquiry. As a reference point the client can then proactively suggest the most suitable and media savvy advocates to construe its point of view.

Development of Communications Tactics

Once properly established a systematic communications framework would be able to shape and suggest appropriate tactics for the company in relation to the different audiences that make up its operating context. More broadly it would retain an awareness of the feelings that each group has concerning, salient company issues, criticism and public perceptions. This would apply in two main respects that of the groups as defined by their inherent characteristics such as ethnicity, as well as those defined as a function of the opinion itself. This information is extremely valuable going forward as a resource for communications planning efforts; this should be a primary focus in constructing any communicative framework.

Popularity Assessment

A further useful aspect is the on going survey of public perceptions related to the company. The constant evaluation of the major stakeholder groups as regards their attitude to the company would allow some degree of strategic planning to be imparted to communicative campaigns. Systematic appraisal of popularity will permit trends across time to be uncovered,

with potentially harmful tendencies being addressed more quickly and effectively than an ad-hoc snapshot evaluation could possibly allow.

Variation in popularity overtime can be analysed for the company as a whole, its most prominent leaders, and operations in respect to different areas of business. Specific corporate moves that shift public perceptions in a noticeably positive or negative way can then more easily be attributed to the relevant division or individual. Where constant problems emerge in a certain element of corporate activities, reform can be concentrated on those areas.

Crisis Management

A properly planned media and communicative framework can help any company in its crisis management efforts. It can suggest the best ways to communicate corporate responses in the wake of a crisis, coordinate internal and external communications, in addition to using its contacts in the media help deliver the governments point of view.

11.3 SCL Media Products and Promotional Tools

SCL has a history of producing media campaigns, and houses a team of experienced copywriters, web designers, and other media experts who can analyse and/or create customised products for clients. Though this list is not exhaustive, the following is a list of digital communications products that SCL has produced for clients in the past.

Website and Online Communications Analysis

In a digital world an effective website is key in brand- and image-building, while online communications are key for engaging with stakeholders, clients, and potential investors. Using user experience analysis, SCL can undertake an indepth analysis of a client's website to determine its strengths, weakness, and assess what elements should be added where. SCL has worked with numerous corporate, social and political clients that have requested us to design, implement and manage their online presence. We can therefore provide any mixture of components deemed appropriate in supporting clients' online presence

Promotional Videos

We can provide a positive visual narratives that can be released to the media and used for public relations purposes to sends a clear and positive message stakeholders or potential investors. These can then be disseminated to international and national audiences and will be available to be used in a variety of ways. Although the form and content of the film(s) will follow from research, it can be assumed that we will use powerful imagery to inspire the viewers and encourage them to take a different look at the client. The film(s) will illustrate the core messaging that the client should disseminate to a global audience and assert the client's commitment to fostering a good investment climate.

Books

A small book detailing anything from client history and future initiatives to future investment strategy can be produced. The book will be a high quality publication to be distributed amongst the strategy's stakeholders.

Apps

iPhone and Android Apps, Facebook Applications, Flash Animation

Database Systems

Identification of needs, general workflow and objectives, general features, basic functionality design, set up of hardware and software platform needed for software testing, definition of security features, general branding with PPP identity, implementation and testing. First we can conduct a general consultancy stage where we gather data related to the client and determine the exact structure of the database. This is also where we learn the layout of your organisation in order to setup the security rights.

12. Appendix G: Supplementary BDI Methodology

Using complex and custom-built statistical models, combining an ERP with behavioural scoring allows us to predict individuals' behaviour. Just as scientists can use different sets of climate data to forecast what the weather will be like for the next week, specially trained experts within SCL harness data to predict the attitudes and ensuing behaviour of both communities and individuals.

The Core Principle

How we look at the population influences our understanding of why different people behave in certain ways. Oftentimes we talk about people in terms of "demographics". Demographics means dividing up people by shared qualities like age, gender, race, etc – the things we would notice looking at a stranger on the street. Many times, this works: young people, for example, often share common behaviours compared to their older neighbours. However, there is another way to look at people. Consider this: although how people act is certainly influenced by their demographic background, their behaviour is not caused by that background. There is no such thing as an "Indian" or a "female" behaviour. Both Chinese male and an African female can share the same attitudes, interests and behaviours, despite their different backgrounds. Although they look different and have different experiences, they may like the same music, know the same people and go to the same shops, for example. This is because they have the same psychographic profile – their personalities and emotionalities are similar. Behaviour has its roots in our inner psychology and it is in fact this psychology that causes our behaviour. Academic research has shown that one of the most robust predictors of our attitudes, interests, preferences and behaviour is our personality. Even very different areas have strong correlations to personality: music preference, retail consumption, gambling, drug-taking and political views. For example, if someone takes a personality test and they are found to be open-minded, experimental, creative and less structured, they are more likely to also be liberal-minded in their religious views.



GEOGRAPHIC VIEW

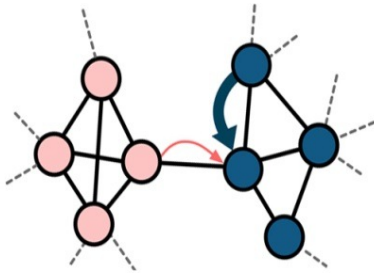


DEMOGRAPHIC VIEW

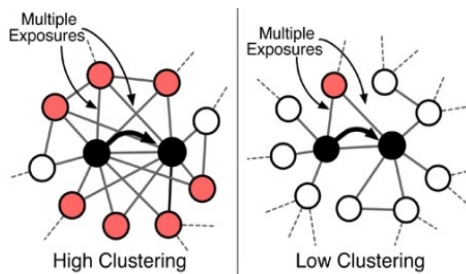


PSYCHOGRAPHIC VIEW

Research shows that ideas, messages and content diffuse through populations in a similar way that diseases spread. Why? Because both disease and ideas are transferred when people interact with each other. In other words, a proclivity towards a behaviour such as crime does not spread randomly, it spreads socially. In psychology, this is called the “social trapping effect” – different communities “trap” and filter information before it is passed onto another group. Therefore, information moves through different social networks at different speeds. This works because communities are usually somewhat homophilic and socially reinforce certain attitudes or behaviours over others.



Network homophily: Different social clusters often share many similar attributes; this includes interests and attitudes. If one member is susceptible to a message, it is likely that others in their network will be too. However, people also act as bridges between different networks, which is how different networks share with each other (e.g. you are the bridge between your cluster of friends and your cluster of co-workers).



Social reinforcement: The more an attitude or behaviour is shared with someone, the more likely they are to also adopt that attitude or behaviour. The “tighter” or “closer” their group of peers are to each other (a “highly clustered network”), the more likely they will be exposed multiple times.

Continuing the disease analogy, different types of people have higher or lower levels of “immunity” from “message contagions”, and different people are more or less “contagious” (e.g. opinion formers vs followers). In public health planning, disease models are used to predict how quickly different viruses will infect the population and who is most at risk. Similarly, we can model how attitudes and behaviours are spread and adopted over time. For example, we can see a social network model of smoking behaviour below:



Armed with population models, vaccination campaigns then target the most vulnerable before an outbreak can occur. They target two groups: those most likely to be infected and those most likely to spread an infection. A vaccine works by injecting a disabled virus to help your body build an immunity to it without being infected. When an immunised person comes into contact with the live virus, their body can now quickly recognise and attack it before the virus has a chance to replicate.

So what does a vaccine have to do with attitude change? There is a persuasion technique called “attitudinal inoculation” that works in the same way as a vaccine. It is intuitive that when people encounter a weak argument, it is easier for them to poke holes and refute it, than if they encounter a strong argument. Inoculation works on the idea that if you deliver a weak version of a message you are trying to counteract, people will easily refute it and then build a “resistance” to it when they encounter the strong version. This is because once people have made up their minds, it is more difficult to change their minds as it creates “cognitive dissonance” – the person will have to admit to themselves they were wrong and reformulate how they perceive something. People are subconsciously very good at avoiding dissonance through ignoring or discounting oppositional information. This dissonance helps a person withstand the strong version of the message. To put the inoculation technique into other words, the best defence is a weak offence.

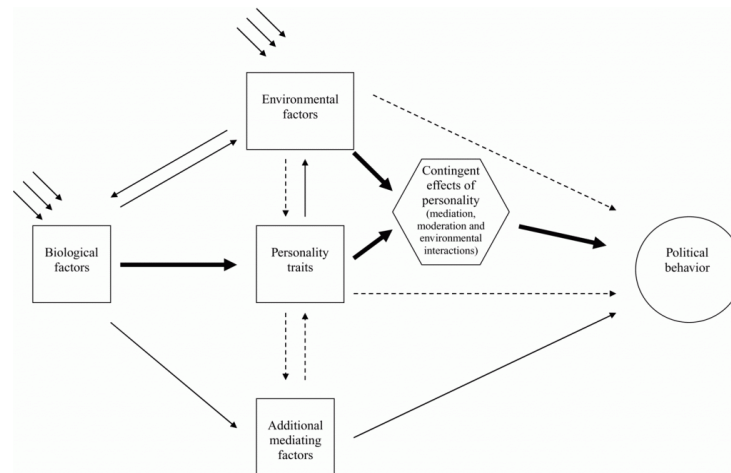
This inoculation grows attitudinal resilience (“immunity”) over time due to something called the “sleeper effect”: people remember the content and the context of information for different lengths of time. For example, you know that “ $1 + 2 = 3$ ”, but it is unlikely that you remember the actual moment in primary school when your teacher revealed this fact to you. This is because your brain prioritises the important bit of information (how to add) and discarded the less important bit (when/where you learned it). The social ramification of this is that contrary to common belief, a message’s strength can in certain circumstances grow over time the longer you leave it alone (rather than bombarding people), and this makes the timing and pace of messaging extremely important.

The strategic and tactical implication for understanding personality, social networks, attitudinal inoculation and the sleeper effect is that modelling allows us to forecast their effects on individual voters. We can apply disease modelling concepts to learn whom in a specific population is most vulnerable to “contagion” and use the inoculation technique to make it harder for them to be tempted by the undesired behaviour. We can also insulate further citizens from the attractions of non-desired behaviours by designing messaging to target likely “infectious” people (i.e. highly social opinion formers) to help messaging better penetrate social networks (“peer-to-peer” or “viral messaging”). Modelling, coupled with a sophisticated understanding of social and political psychology, will ultimately help the SCL client gain the edge they need and achieve their goals.

The Process

At this point, talk of personality, emotions, and inoculation and political views may all seem a little nuanced. But there is very tangible process to apply this knowledge in a strategic way. The premise that our personality impacts behaviour is very important to keep in mind – personality impacts not only how we vote, but also what we buy, where we go out, what music we listen to, what magazines we read, etc. Although our activities change, our underlying personalities stay the same regardless if we are consuming, working, playing or voting. So, how someone behaves in other aspects of their life will give us clues about their personality, and an educated guess about their personality can in turn can give us clues on

how they likely perceives the world. This “educated guess” is the result of something called predictive analytic modelling.



Modelling involves looking for patterns in data. But does knowing the newspaper you read, the supermarket you shop at, or your job really help us find out how you vote? On its own, not really – simply put, there is no single “silver bullet” data point that can predict voter behaviour. However, by using a combination of many different layers of data it will allow us to make predictions with a high degree of accuracy. Each layer of data adds more and more context to the voter, allowing us to gain a deep understanding of their likely opinions and behaviour.

1. Psychometric Inventory

This involves creating a special type of survey to identify underlying psychological traits, attitudes, persuadability and emotional triggers. The survey would be constructed with empirically validated design to avoid bias and maximise validity.

Dimension	High scorers are...	Low scorers are...
Extroversion	Outgoing, enthusiastic and active; you seek novelty and excitement.	Aloof, quiet and independent; you are cautious and enjoy time alone.
Neuroticism	Prone to stress, worry and negative emotions.	Emotionally stable but can take unnecessary risks.
Conscientiousness	Organised, self-directed and successful, but controlling.	Spontaneous, careless, can be prone to addiction.
Agreeableness	Trusting, empathetic and compliant, you are slow to anger.	Uncooperative and hostile, find it hard to empathise with others.
Openness	Creative, imaginative, eccentric and open to new experiences.	Practical, conventional, sceptical and rational.

2. Field Research

A very large randomised sample of approximately 5,000 – 7,000 people is collected (normal polling sample is 1,200). The sample respondents would be given the psychometric inventory by telephone. To ensure a balanced demographic spread, live canvassed data collect may occur where there are gaps in the data or low response volume in particular areas.

3. Data Augmentation

Public record on individuals will be enhanced with various distinct, non-synchronous variable datasets (e.g. education, welfare, insurance, financial transactions, credit or debt data, charity donations). Other data, such as occupation, age, home ownership or housing type, children and marital status are equally useful.

4. Census Output Area Overlay

Data from the Census is coded to “output areas” which are small clusters of people. All government statistics, such as health or crime data, are also coded to output areas. Although Census and government data is not data on individuals, the granularity can be down to groups of 100 individuals, which provides highly granular social context to the individual-level data we will have.

5. Analytic Modelling

The super sample, individual data and census overlays are all fed into special parallel computing clusters which each model, and then re-model (and then re-model again!) the datasets. Rather than just using common regression, which is how most consumer data is modelled, different and far more complex modelling techniques are used in conjunction with each other (e.g. kNN, heuristic neural networks, singular value decomposition). This is because different models have their own strengths and weaknesses, so by using several (called “hybrid models”), we can incrementally reduce the error rates and individual weaknesses of each technique.



6. Behavioural Scoring

Each individual record would then be scored – much like a credit score – on their likelihood to commit a crime (or support criminality), the issues they care about, how persuadable they are, whether negative or positive messages should be used, etc.

Thank you for taking the time to read this proposal.

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

Yours sincerely,

A handwritten signature in black ink, appearing to be 'Alexander Nix', with a long horizontal flourish extending to the right.

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