WikidataCon 2023 post-event research

By Cornelius Kibelka & Venus Lui; February 26, 2024

Intro

In 2023, WikidataCon, the biannual conference for the Wikidata community, was jointly organized by Wikimedia Deutschland and Wikimedia Taiwan. For the second time since 2021, the event was co-hosted in collaboration with another affiliate, and for the first time with an affiliate from the ESEAP region. In 2021, the event was co-hosted with the Brazilian affiliate Wiki Movimento Brasil, widely regarded as 'incredibly successful'. In contrast to the 2021 edition, expectations for the 2023 event were not met, e.g. overall participation was much lower as well as online participation. Beyond the event itself, the cross-affiliate partnership between the German and Taiwanese side has been considered challenging.

While 'collaboration' is considered core to the Wikimedia Movement, establishing and managing partnerships between Wikimedia affiliates is far from common and there are few or no procedures established. natural and easygoing. Different cultural and organizational contexts, as well as matters of language and power dynamics, need to be taken into account. Even (or especially) organizations with a long track record of cross-affiliate partnerships are not exempt from these challenges.

In light of the attributed importance of cross-affiliate partnerships within the Wikimedia Movement – several Movement Strategy recommendations aim for structural changes to deliberately support and promote them – WikidataCon 2023 serves as a valuable case study: **What lessons could be learned from the partnership around the event?**

To answer this main question and to help ensure that the evaluation case study is considered credible and legitimate, interviews, lasting approximately 60 minutes each, were conducted with 6 individuals. Interviews were conducted in English, German or Mandarin, respectively.

- Léa Lacroix (Wikimedia Deutschland)
- Simon Schmitz (Wikimedia Deutschland)
- Alan Ang (Wikimedia Deutschland)
- Joyce Chen (Wikimedia Taiwan)
- Dennis Raylin Chen (Taiwanese Wikidata Community)
- Yucheng Lin (Taiwanese Wikidata Community)

One individual chose not to be available for being interviewed, either in oral or written form. Additional briefing interviews were conducted with Raja Amelung, Kris Litson, and Nicole Ebber (all from Wikimedia Deutschland). The selection of interviewees was made by Léa Lacroix.

It has to be highlighted that the conference and the collaboration between both (or three) parties took place – thanks to outstanding engagement of individuals involved, and despite the structures around it. Therefore, the objective of this analysis is not to single out individuals, their actions or their responsibilities, but to highlight areas where processes should be questioned, improved or changed, and lessons could be drawn. This applies first and foremost to Wikimedia Deutschland, single contracting client of this analysis, but also to the Movement at large. The report is structured along 4 topics, which are based on thematic clusters identified throughout all interviews. The first section focuses on the partnership's initiator, Wikimedia Deutschland, highlighting challenges and potential improvements around the WikidataCon partnership. The second section focuses on the Taiwanese partners, the affiliate Wikimedia Taiwan and the Wikidata community. The third section covers practical questions that came up during the partnership, while the last section questions the current event design of the WikidataCon.

Wikimedia Deutschland's "Organizational readiness" for partnerships

The first section focuses on Wikimedia Deutschland, founder of Wikidata and its conference WikidataCon, and initiator of this partnership to organize the event together with another Wikimedia affiliate. Wikimedia Deutschland organized the conference for the first time in 2017 and subsequently in 2019 in Berlin, each time as the sole main organizer. In 2021, Wikimedia Deutschland hosted the conference for the first time with a Wikimedia partner, namely the Brazilian affiliate Wiki Movimento Brasil. Due to the Covid-19 pandemic, the conference took place exclusively online, not in a hybrid format (both in-person and virtual) as originally planned. Despite the purely virtual nature of the conference, both partners, WMDE and WMB, were equally involved and shared responsibility. The WikidataCon 2021 and the joint organization with a partner were considered highly successful, setting standards for future event partnerships of Wikimedia Deutschland.

Understanding the context of the previous WikidataCon is crucial for comprehending the changes leading up to WikidataCon 2023. The success of the 2021 conference set expectations

and standards within Wikimedia Deutschland, although the preparation and execution of the 2023 conference occurred in a significantly different context.

The interviews revealed that "partnership readiness" is a crucial issue at Wikimedia Deutschland. There were partially divergent motivations and expectations regarding the partnership, as well as different views on the strategic orientation of WikidataCon. Slow internal processes in decision-making and implementation were also identified. Regardless of the involved partner and the challenges of jointly organizing the conference, questions about WikidataCon itself arose, raising the question of whether Wikimedia Deutschland was organizationally ready and structurally capable of entering into such a partnership. The interviews highlighted that an institutional self-assessment by WMDE for this partnership either did not take place or only occurred to a limited extent.

There is a variety of different definitions and approaches for assessing "partnership readiness,". As an example, there are the "4 Cs of organizational readiness", taken from the Partnership Co-Design Toolkit (PACT), provided by the D-Lab of the MIT.

1. Clarity: Are we clear on our respective motivations, expectations, and capabilities?
2. Convergence: Are we aligned on what we will achieve together, for whom, and how?
3. Capacity: Can we mobilize the people and resources necessary for the partnership?
4. Confidence: Are we confident in the partnership we co-designed and in our collective capacity to implement it successfully?

In the interviews, it became evident that these questions from WMDE could not be clearly answered with "yes." There were different ideas about the orientation of the partnership, especially regarding the roles and responsibilities of Wikimedia Deutschland. These differences were particularly noticeable between the operational level and the management level.

Specifically, the following points are worth mentioning:

The formation of partnerships with organizations and groups from the Wikimedia Movement, including the organization of WikidataCon, aligns with the strategic direction of Wikimedia Deutschland to share knowledge and support the movement as a whole. However, it became clear that within Wikimedia Deutschland, there were different ideas about the role the organization should play in such a partnership. In contrast to the 2021 conference, there was a strong desire for a purely "advisory" and "supporting" role for Wikimedia Deutschland, in order to give the Taiwanese partner as much freedom as possible and mitigate the presence of North / South power dynamics. However, there were no previous experiences with such a role in past partnerships. At the same time, WMDE remained the "owner" of the conference with an associated vision and had expectations for the conference design. This is particularly evident in the role change of Wikimedia Deutschland, that occurred roughly halfway through the preparation time of the conference, from an advisory to a co-organizing role.

Despite applications from other regions of the world (South America, Africa), there was a conscious decision at the operational level to approach an organization from the ESEAP region.

In terms of the experiences in organizing conferences and the size of the Wikidata community, only Wikimedia Taiwan and Wikimedia Indonesia were considered. Wikimedia Taiwan was proactively approached, because there was a partnership with Wikimedia Indonesia already ongoing. As in 2021, Wikimedia Deutschland had prepared an internal checklist for assessing the partner.

Neither Wikimedia Deutschland as an organization nor the members of the core team of WikidataCon had previous work experience with Wikimedia Taiwan nor any other organization from the ESEAP region – except for the later-involved WMDE staff member Alan Ang, Wikidata Partnerships Manager with Singaporean background and Mandarin knowledge. His background and language skills were considered 'sufficient' to cover eventual cultural challenges. Both Alan Ang, as well as Simon Schmitz, WMDE staff member of the Event Team, joined the organization the year before, had no Wikimedia background supported the organization of the WikidataCon for the first time.

Furthermore, the defined success criteria for WikidataCon 2023 were the same as in 2021: "People from 32 countries found WikidataCon helpful." This means that there was no adjustment or reflection on the success criteria; it was assumed that the conference should be "at least as successful" or "more successful," even though WikidataCon 2021 took place in a completely virtual form in a very different setting, and both organizations planned the organization jointly from the beginning.

> *"We always increment both in quality or at least perceived quality from our perspective and in innovation, trying new things."*
> – Léa Lacroix

In addition to the strategic questions about partnerships, the question arises as to whether WMDE was institutionally capable of organizing a conference with a partner. The following points are particularly noteworthy:

The special political situation of Taiwan undoubtedly required special consideration when signing the partnership to estimate possible further political consequences for Wikimedia Deutschland. However, this led to an exceptionally long decision-making process with several months of waiting. The consequences drawn, including the canceled in-person meeting (kick off) of both teams, had significantly negative effects on the overall performance of the partnership.

Financial support was an essential part of the partnership, and the internal process for processing the funding took a lot of time, not only due to the political situation in Taiwan but also because internal processes were rearranged or completely redesigned. There is still significant potential for improvement for an organization that aims to financially support other Wikimedia organizations and groups.

We were a little bit unprepared. [...] we thought it would be enough [to have Allan as support]. It's difficult for me to assess whether Wikimedia Deutschland was ready. [...] It didn't even cross our mind [that we couldn't be prepared for this partnership], especially because the experience with Brazil was generally positive. We were all very confident and I was confident about myself. 'I handled the previous one, I'm going to handle this one just the same'."

– Léa Lacroix

Wikimedia Taiwan & the Taiwanese Wikidata community: "Organizational readiness" for partnerships

The previously mentioned questions regarding "Partnership Readiness" can also be applied to the partner of WikidataCon 2023, Wikimedia Taiwan, or more accurately, the Taiwanese Wikimedia community – and likewise cannot be fully answered with a resounding "yes."

One of the crucial points here is that it wasn't the Wikimedia organization "Wikimedia Taiwan" acting as the partner for the conference, but rather the formally unorganized, independently operating Taiwanese Wikidata community. Wikimedia Taiwan served as a fiscal sponsor and intermediary between Wikimedia Deutschland and the Wikidata community. Accordingly, the partnership actually involved three partners, a fact that was not clearly communicated beforehand, leading to additional challenges. In addition to difficulties in collaboration with the German Wikimedia affiliates, issues between the two Taiwanese partners also surfaced.

Due to different priorities, the partnership for the conference played a very limited role for Wikimedia Taiwan. Consequently, the organization allocated only minimal resources, as the primary responsibilities were up to the community. It is unclear whether there was a shared understanding of motivation, expectations, and capabilities for organizing the conference between the affiliate and the community. The parallel occurrence of Wikimania in Singapore in the same year, just a few months earlier, hindered rather than facilitated the organization of WikidataCon.

It became evident that internal communication between the affiliate and the community (and thus the definition of roles and responsibilities) did not meet expectations. A suggested review meeting after the conference did not take place. The volunteer leadership of Wikimedia Taiwan was hardly involved in the whole decision-making and organizing process, and it was suggested that for future partnerships stronger involvement of the board should be considered.

The partnership for organizing WikidataCon was primarily seen by the Taiwanese side as an opportunity for learning and gaining experience, as actual experience in organizing Wikimedia conferences or events was very limited. Previous Wikidata events were considered rather small and organized among "friends" on a volunteer basis, barely involving staff members.

Similarly, there was a lack of experience in partnerships with Wikimedia organizations outside the ESEAP region. Overall, the Taiwanese interviewees lamented a shortage of human resources both at Wikimedia Taiwan and within the community. However, and that's to be highlighted, there was an overall "positive energy and enthusiasm" on the Taiwanese side.

> *To be honest, personally, I feel that this collaborative experience, overall, is quite positive. Yes, but I think a significant reason is that [Wikimedia] Germany has relatively rich experience. It's a bit like being lucky; they guide us to accomplish anything we want to do in Taiwan. However, it's up to us, at Wikimedia Taiwan, if we can make use of it, if we learn and gain from this collaboration. [...] So, personally, I feel that if [Wikimedia] Germany continues to maintain this kind of attitude, it's quite a healthy approach when collaborating with any community.*

> — Joyce Chen

The challenges of co-hosting an international event

Co-hosting a conference is a significant and not to be underestimated challenge that requires exceptionally good preparation, planning, and communication. This applies both at the institutional level for the involved partners and at the individual level for the members of the organizing team.

All interviewees emphasized that one of the greatest challenges was the diverse, both explicit and implicit, expectations and perceptions of the involved partners. This included expectations regarding their own tasks, roles, and responsibilities, as well as vision and design of the conference as a whole.

As explained in the previous section, there were differing, not aligned views within Wikimedia Deutschland regarding whether the organization should take on a more advisory or co-organizing role. On the Taiwanese side, there was a strong desire to gain experience through conference organization with the German partner, while simultaneously focusing only on well known tasks in the execution of the local on-site event. This mismatch of expectations persisted throughout the entire organizational phase of the conference and, according to several participants, repeatedly led to difficult and challenging situations.

Not only did expectations regarding roles and responsibilities in conference organization differ, but also the vision of WikidataCon as a whole varied. The Taiwanese perspective saw the conference primarily as an opportunity to showcase local/regional Wikidata projects, strengthen and expand the Taiwanese community, and generate "buzz" for Wikidata. Accordingly, the focus was on the organization of the in-person conference in Taiwan with its logistical questions and challenges.

The "international component" of the conference, namely the biannual gathering of the international Wikidata community, was not significant for the Taiwanese partners, contrary to the

expectations of the German side. This meant that the process for selecting international program contributions and, especially, communication with the international Wikidata community were initially neglected. Therefore, Wikimedia Deutschland took on a stronger, more active "co-hosting" role, especially for the virtual part of the conference, about halfway through the preparation period.

All these aspects could have been clarified from the beginning with better, thorough preparation or a "kick-off" for joint planning. In particular, a face-to-face meeting, whether in Germany or Taiwan, could likely have resolved numerous later issues in advance and fostered an overall "team feeling" among the participants. Due to long decision-making processes on the part of Wikimedia Deutschland and diplomatic difficulties in a German-Taiwanese partnership, this meeting did not take place, even though it would have been crucial and necessary for this collaboration.

Such a face-to-face kickoff could also have contributed to developing a shared understanding of communication. The very different, partly culturally conditioned communication styles and working cultures of the participants posed a significant challenge and were described by several as the "greatest difficulty" in collaboration. In hindsight, the WMDE interviewees considered their initial communication as "too casual," while the Taiwanese side often refrained from seeking support in difficult situations to save face.

> [For] folks in Asia – like myself, right, especially those who grew up in the traditional Chinese Confucius background – there's this concept called "face saving" [...]. So we do not show our weakness. You know, they do not say that. [...] So when you ask them questions, do you have any issues and challenges? They usually say 'everything is good'. All others [assume that] everything is okay. But then we only realize that things are not so okay.
> – Alan Ang

On the Taiwanese side, some team members exclusively spoke Mandarin and had no knowledge of English. For this reason, all meetings between the German and Taiwanese partners were consecutively translated, which took up a significant amount of time. Originally, an interpreter was not planned / budgeted for. Later on, Alan Ang, the Partnerships Manager at Wikidata, who was not initially assigned for this task, took on the role of consecutive interpretation. Additionally, all working documents needed to be bilingual, which required additional resources.

There were also other practical challenges: On the Taiwanese side, mainly volunteers were involved, who pursued other professional activities alongside, while on the German side, only full-time employees worked during office hours. Due to the substantial time difference between Germany and Taiwan (6 or 7 hours), it was extremely challenging to find suitable time slots for meetings. Additionally, some holidays in Taiwan (Lunar New Year, Ching Ming Festival, etc.) and summer vacation season (when staff members took their holidays) in Germany led to huge delays in communication, and required a lot of patience on both sides.

All of these are typical and not uncommon challenges for partnerships between organizations from very different linguistic, cultural, and geographical contexts. The overcoming of these organizational, communicative, and linguistic barriers in WikidataCon 2023 was solely due to the efforts of individuals. However, neither structures nor plans were prepared or adapted, leading to significant frustration, exhaustion, and dissatisfaction for not taking these issues into account.

> *I am very positive about the execution. There were a few technical pick-ups. Our Taiwanese colleagues responded well, didn't sleep for three days and worked through it all. So there was a momentum 'We're now doing it together and simply trying to implement it in the best possible way'. [In the end.] we had the feeling it's a joint project.*
>
> – Simon Schmitz

"Tribal meeting" and/or Outreach event: Future development of WikidataCon

The path taken in 2021 to organize the WikidataCon not solely by Wikimedia Deutschland in Berlin, but in collaboration with a partner from the Wikimedia Movement aligns with the desires for decentralization, shared learning, and capacity-building. In other words, Co-hosting is meaningful. However, the question remains whether the WikidataCon, as an international, multilingual, and hybrid (!) event, is too challenging to be organized by a smaller, less experienced Wikimedia organization.

Hybrid events are logistically demanding and require careful preparation. Wikimedia Deutschland, as the largest, oldest, and most experienced Wikimedia affiliate, organized the first hybrid event of the Wikimedia Movement, the Wikimedia Summit 2022, and faced numerous challenges in this context. The desire for multilingualism is understandable and legitimate but entails additional costs and implementation difficulties. Communicating with the international Wikidata community is a "skill" that is not inherent and not mastered by many because they do not necessarily require it.

Therefore, the question arises: What is the actual goal of the WikidataCon? What added value could be expected when being hosted by another affiliate? Is it intended to be the biannual "tribal event" of the international Wikidata community, where the core community gathers (virtually) to strengthen the sense of community? Or is it an "Outreach" conference meant to showcase (local) Wikidata projects, recruit interested individuals, and generally raise awareness for Wikidata? Both are not fundamentally incompatible and can be combined in a conference, provided that all stakeholders agree and understand what that entails. Several participants emphasize that there is no "going back" to a WikidataCon organized solely by Wikimedia Deutschland in Berlin. For a rotating model organized in collaboration with others, fundamental questions about orientation and design must be addressed, as this report illustrates.

"I think [it was a] great conference within the whole Wikimedia ecosystem; [...] for the active Wikidata Taiwanese community members that joined the event. [...] they can be proud of it [and] say that [they're] proud to be part of this active community."

– Dennis Raylin Chen

Conclusion

Despite the numerous challenges faced during this partnership, WikidataCon 2023 successfully took place, largely owing to the dedication of individuals and "despite" existing structures. Reflecting on this partnership becomes crucial to discern what could be done differently or improved for future WikidataCons or cross-affiliate partnerships in general. Recommendations and suggestions for enhancements can be derived from each section:

- **Self-assessment of Organizational Readiness for Partnerships:** Wikimedia Deutschland initiates and maintains partnerships within the Wikimedia Movement, yet lacks a clear definition of specific goals and whether the organization itself is well-equipped to be a good partner. A recommended step is to implement an internal organizational preparation process for partnerships, outlining purposes, goals, and readiness. Different potential roles within partnerships (such as financial support, advisory roles, or active participation with staff involvement) should be defined. The handling of financial support, as observed with Wikimedia Taiwan, requires further improvement.
- **Improve Communication and Clarify Roles & Responsibilities:** In the case of Wikimedia Taiwan and the Taiwanese Wikidata community, the level of preparation for the partnership with Wikimedia Deutschland comes into question. Communication between the Taiwanese partners and Wikimedia Deutschland needs refinement, particularly when Wikimedia Taiwan acts solely as an "intermediary" and "fiscal sponsor" for the community. A clearer definition of roles and responsibilities is essential.
- **No Complex Event Without an In-person Kick-off:** Co-hosting an international, hybrid event across multiple time zones is complex and not to be underestimated. Interviews highlighted that an in-person kick-off event involving all stakeholders could have preemptively addressed many subsequent issues and fostered a stronger "team feeling" among participants.
- **Choose a Common Language or Budget for Professional Interpretation:** While multilingualism is an asset in the Wikiverse, clear communication within cross-affiliate partnerships is paramount. Opting for a main language of communication that all participants can use is ideal. If that's not feasible, budgeting for professional interpretation from the outset is necessary.
- **Discuss and Clarify the Future Development of WikidataCon:** As a significant event in the Wikimedia Movement, WikidataCon underwent changes when co-hosted with

another affiliate in 2021. With different partners, the event's aim and mission evolve. Hosting in countries of the "Global South" emphasizes outreach, and discussions should revolve around balancing the gathering of the international Wikidata community and creating awareness around Wikidata during future events.