



# EU Policy – Strategic Direction

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## Perspective of 2030 Movement Strategy

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## Document Guide

This document names and describes the strategic directions of the EU policy and advocacy work carried out in and from Brussels on behalf and with the support of the EU Wikimedia Chapters, User Groups, as well as volunteers and staff who engage in advocacy and follow the policy developments.

The document features 6 strategic priorities that were formulated in close relationship and as an outcome of the Wikimedia Movement 2030 Strategy. While they don't correspond each to only one strategic recommendation, their scope encompasses the relevance of each strategic recommendation to EU advocacy work.

Each priority notes references to another document, the *Takeaways from the 2030 Movement Strategy Recommendations for EU Policy and Advocacy*. *Takeaways* explores each of the movement recommendations separately and provides a more detailed reasoning to the ideas that are synthesised in this document. It provides a record of the thinking that led us to propose such a focus, scope and methods for the future of our work.

The 6 strategic priorities are divided into following categories:

- 1 thematic priority that focuses on the substance of our work, the scope of interest and ways of increasing impact by adequate programming and prioritisation of topics and dossiers
- 3 functional priorities that provide guidelines on ways and methods of achieving our programmatic goals, with a special regard to all types of resources we need to carry out impactful work
- 2 horizontal priorities, which should apply across other 4 and serve as a value stress test for any project and actions undertaken as a result of the future strategy

## Relationship with the qualitative study of EU policy work

For full picture, this document should be considered together with the results of qualitative study *The Brussels office as perceived by its partners* – authored by Malgorzata Bakalarz Duverger and Ana Correa Do Lago and based on over 30 interviews with our partners in Brussels and in European countries as well as at Wikimedia Foundation.

The insights from the community are incorporated into the document below as to their the substance and the source of the intervention is mentioned for each recommendation in the part *Where does it come from?*

The study gave us a better picture of how the work if the Brussels office is perceived and what are the expectations towards the team members. In particular, we have a mandate from the community to set strategic priorities and increase the impact of our operations:

“Most interviewees share the argument that the Brussels Office should take a more proactive stance on legislation impacting Wikimedia as well as digital rights and the internet governance more broadly. To do so, they need more capacity and also more substantial alliances. The capacities pointed are

- a) in–depth research,
- b) expansion of collaborations with experts in the digital field (including academia),
- c) understanding legal texts and translating to Wikimedians local contexts
- d) "being everywhere" in Brussels;
- e) having a clear agenda of the strategic priorities of the Wikimedia movement.”

Bakalarz Duverger, Correa Do Lago, p. 16

Hopefully this document is an exemplification of how this mandate can be imagined; and our future actions – how it can be fulfilled.

## THEMATIC:

### Priority I

#### WE ARE THE VOICE OF “GOOD TECH”

##### What does it look like?

Our profile and branding encompasses both the notion of the “cultural phenomenon” and of the “good tech”. The latter is based on tech-savvy perspective in our conceptual work and conversations.

We have a well-worded vision of the online ecosystem that allows for programming in key proactive ideas beyond the reactive work. We are able to make a direct connection between our vision and each dossier that we work on as a result.

We are able to bring in additional expertise on issues identified as strategic to be both reactive and proactive. We have the necessary networks and resources to keep learning and deepening of our understanding of circumstances shaping our work.

We sustain functioning partnerships across issues and in our community. We also branch out to external partners who can amplify that message.

We gather lessons and guidance from each major campaign through a post-mortem process, which findings are available to our colleagues and community to enable learning with us. We are aware that European laws become a model for other jurisdictions and we bring that consideration to stress-testing the policy solutions we advocate for.

##### Examples of work to do:

1. We integrate evidence from various projects and their takeaways into policy. We achieve that through mobilising our community to provide more information about solutions that could be scaled out.
2. We refine the process created while working on the Vision and Policy Solutions so that, in time, it encompasses all key topics.
3. We create an acquisition plan of resources and expertise (by internal training and outside support) and – if necessary – of new permanent or temporary team members (in Brussels and in chapters) to ensure adequate representation of our renewed vision.

## Where does it come from?

The above consumes our reflection on:

- Recommendation 1 Increase the Sustainability of Our Movement (I, II, V in the *Takeaways*)
- Recommendation 2 Improve User Experience (IV in the *Takeaways*)
- Recommendation 7 Manage Internal Knowledge (II in the *Takeaways*)
- Recommendation 8 Identify topics for Impact (I, II, III, IV in the *Takeaways*)
- Recommendation 9 Innovate in Free Knowledge (I in the *Takeaways*)
- Recommendation 10 Evaluate, Iterate and Adapt (II in the *Takeaways*)
- “These metaphors illustrate the values the interviewees assign to general roles of the Brussels Office, including: agency, “utility,” stewardship, intelligence, and public representation.” – *The Brussels office as perceived by its partners* – a qualitative study by Malgorzata Bakalarz Duverger and Ana Correa Do Lago, 2021, p. 4
- “Both IPs and EPs underline the momentum of greater public awareness of the value of free access to knowledge as an opportunity to push for a digital commons agenda.” Bakalarz Duverger, Correa Do Lago, p. 7
- “external partner organizations often praise the breadth and generosity of the Office’s involvement: they do not just focus on ‘what’s good for their service’ but also look at what’s good for the wider internet ecosystem.” Bakalarz Duverger, Correa Do Lago, p. 8
- “While a few Wikimedians would like to see the Brussels lobbying embrace new topics such as sustainability or AI ethics, they also note that the definition of these topics should be guided in response to the guidelines and vision provided by the Foundation and/or the Movement. Making this vision explicit would be helpful to strategize what partners and topics are key in advancing, according to the defined vision for the Movement” Bakalarz Duverger, Correa Do Lago, p. 13

## FUNCTIONAL:

### Priority II

#### OUR KNOWLEDGE AND EXPERIENCE BENEFITS OUR COMMUNITIES

##### What does it look like?

We produce accessible, digestible information and provide a good experience for our community to explore policy issues. We formed communicational habits to reach our communities where they are, online and offline.

We have a pool of materials and resources documenting our expertise and assisting skill development for policy and advocacy teams in the Movement. These include practical guidelines on managing dissent regarding policy ideas and advocacy campaigns. To make a statement, our communities do not resort to Wikipedia blackouts before they have exhausted all other options that our work and experience offers them.

##### Examples of work to do:

4. A revision of information organisation on Meta and introducing improvements to ensure better findability and clarity of content, such as better metadata
5. Dedicated blogging space for EU affairs further increased by diligently crafted social media presence and supported by outreach plans
6. Exploring the feasibility of translations for the most relevant materials into other languages
7. Increasing the variety of communication tools with stories, videos, infographics, mashups, etc. explaining complex arguments in a practical way.
8. Creating an internally accessible record of successful projects and special cases (unexpected partnerships, etc.) to inspire other policy activists in our community with new approaches

##### Where does it come from?

The above consumes our reflection on:

- Recommendation 2 Improve User Experience (I and II in the *Takeaways*)
- Recommendation 3 Provide for Safety and Inclusion (I in the *Takeaways*)
- Recommendation 5 Coordinate Across Stakeholders (I, II, III, IV in the *Takeaways*)
- Recommendation 7 Manage Internal Knowledge (I, III in the *Takeaways*)
- Recommendation 9 Innovate in Free Knowledge (II, IV in the *Takeaways*)

- „a) networking and capacity building -- interviewees underline the role of the networking initiatives and communication (The Big Fat Brussels Meeting, bootcamps, newsletter, etc),  
b) legal advice and knowledge sharing -- interviewees unanimously emphasise the importance of Brussels Office’s legal advice: its high quality, breadth that reaches local contexts, and speed;” Bakalarz Duverger, Correa Do Lago, p. 10
- “One of the most recurring recommendations among the interviewees was the need for a better communication to be developed on different levels:
  - a) in terms of transforming public discourse and raising public awareness;
  - b) in terms of strongly communicating to the EU partners.” Bakalarz Duverger, Correa Do Lago, p. 18

## FUNCTIONAL:

Priority III

### OUR COMMUNITIES ADVOCATE FOR THEMSELVES

#### What does it look like?

Our communities have an active role in shaping our EU policy scope and advocacy range. We have processes to meaningfully involve them in shaping our work and they take part in executing it.

We have ways to involve volunteers from the community in advocacy, especially where they can make a difference on EU policy by engaging with decision makers from their own geographies.

We have systems, processes and resources in place to support existing and new staff and volunteers in various aspects of advocacy work, either internally or by a network of external experts and partners.

We constantly enrich our understanding of issues that marginalised groups in Europe experience in access to Free Knowledge and their relevance to policy work. Our staff and volunteer group is increasingly diversified to include multiple perspectives in advocacy.

We assist our communities for whom it is not safe to openly advocate for policy changes in framing narratives and approaches that contextualise the desired change in a variety of “non-political” ways.

#### Examples of work to do:

9. We offer tailor-made instruction and training on topics of interests internally, and involving friendly organisations.
10. We facilitate access to skill training relevant for advocacy, such as public speaking, storytelling, project management, etc. by helping define needs and connecting recipients with an opportunity responding to their unique context.
11. We prepare a general guideline describing our needs in terms of team diversity, by ourselves or with the help of external experts
12. We develop new approaches to events that include quality online experience to lower the barriers or participation (also relevant during the pandemic crisis).
13. We create necessary anonymity and representation protocols that help protect our communities who cannot safely advocate for themselves.
14. EU policy matters are represented in the Global Council to ensure alignment with the global strategic direction.

#### Where does it come from?

The above consumes our reflection on:

- Recommendation 1 Increase the Sustainability of Our Movement (III in the *Takeaways*)
- Recommendation 2 Improve User Experience (III in the *Takeaways*)
- Recommendation 3 Provide for Safety and Inclusion (II in the *Takeaways*)
- Recommendation 4 (I, II, V in the *Takeaways*)
- Recommendation 6 Invest in Skills and Leadership Development (I, II in the *Takeaways*)
- Recommendation 8 Identify topics for Impact (V in the *Takeaways*)
- Recommendation 9 Innovate in Free Knowledge (III in the *Takeaways*)
- Recommendation 11 Thou Shall Not Be Afraid. Strategy in the COVID-19 Era (VI in the *Takeaways*)
- “IPs underlined an important function of the Brussels Office in supporting the chapters, by providing training and advice on local advocacy efforts.” Bakalarz Duverger, Correa Do Lago, p. 5
- “c) **communication** -- interviewees point at the Office’s involvement in ensuring they get understanding of EU-level policies and processes, as well as support in broader communication on local level, by prepping the Wikimedians with briefings, and delivering presentations at local conferences, when needed;



- d) “**hospitality in Brussels**” -- interviewees appreciate support in navigating EU institutions in Brussels, from meetings to help with getting through the maze of buildings, etc ;
- e) **relations** -- interviewees acknowledge the Brussels team’s features that provides the irrefutable sense of reliability: patience, trustworthiness, friendliness, proactive communication, and generosity of the Brussels Office.” Bakalarz Duverger, Correa Do Lago, p. 10

## FUNCTIONAL:

Priority IV

### ADVOCACY FLOURISHES IN SUSTAINABILITY

#### What does it look like?

Our work is backed and sustained by a steady, diversified and ethical funding. We mobilise new and existing donors to support a range of topics and scales of operations. We assist with regranting and facilitate access to a variety of resources needed to run advocacy work in our communities.

We prioritise actions and processes that position us as a trusted partner to those who want to support Free Knowledge by financial and non-financial contributions.

We plan acquisition and spending of the resources in a way allowing us to build backups and respond to unexpected opportunities and challenges in an adequate way.

#### Examples of work to do:

15. We resume our plan to find new founders and assisting in building new funding programs that Free Knowledge activists can benefit from.
16. We create a sustainability fund that is continually enlarged to create a necessary financial backup for your Brussels operations

#### Where does it come from?

The above consumes our reflection on:

- Recommendation 1 Increase the Sustainability of Our Movement (IV in the *Takeaways*)

- Recommendation 4 Ensure Equity in Decision-Making (IV in the *Takeaways*)
- Recommendation 10 Evaluate, Iterate and Adapt (I, III, IV in the *Takeaways*)
- Recommendation 11 Thou Shall Not Be Afraid. Strategy in the COVID-19 Era (II, V in the *Takeaways*)
- There is a shared understanding among the Wikimedians that between two main activities: lobbying ..., and support to the Wikimedians ... the Brussels Office team members are not sufficiently equipped 'to be at the table.' Bakalarz Duverger, Correa Do Lago, p. 12
- "Wikimedians praise the work of Brussels office, they also understand that the current structure is insufficient for an effective lobbying presence: 'when you're really there as a bigger actor can you be visible and participate in all the lobbying as you can. Otherwise you're just a NGO, which like everyone else, with no real impact or whatever... you have to become really present and be very clear also how you push things forward.'" Bakalarz Duverger, Correa Do Lago, p. 13
- "But it's our ability to be ahead of a policy agenda. It requires a much larger infrastructure than we have ... I would like us to have a more proactive, that specific thing that we are fighting for, that we want to change positively." Bakalarz Duverger, Correa Do Lago, p. 16

## HORIZONTAL:

### Priority V

#### WIKIMEDIA COMMUNITIES AND THEIR WELLBEING IS AT THE CENTER OF POLICY INTERESTS AND ADVOCACY WORK

##### What does it look like?

Our policy work aims at building a suitable environment for third sector internet structures. Including special needs of self-governed volunteer projects is always front and centre in planning our activities.

We ensure that there are points of entry in advocacy for people who wish to improve their situation through advocacy on Free Knowledge. Whenever relevant, we re-examine whether the policies we advocate for reflect the wellbeing of marginalised communities and marginalised knowledge. Diverse voices are centred and these perspectives are amplified in internal policy debates.

In our policy work that focuses thematically on digital issues, we re-examine the relevance of topics of general concern such as climate crisis, racial and gender equality, LGBTQI+. We evaluate the relevance of our work to underrepresented communities that experience harassment and are driven away from our movement's projects. Whenever possible, through the policy focus we actively participate in dismantling the systems of oppression that affect these communities.

We protect the Wikimedia project communities from malicious action, both in the policy arena and beyond, aiming at lowering the general threat level they face.

#### Examples of work to do:

17. A concise internal evaluation of our current focus from this perspective
18. Requesting consultancy on the topic to help identify issues and new angles on current topics that help us better fulfil these requirements
19. Joining forces with Chapters and other partners to help sustain and enlarge a diverse participation in the Wikimedia cause.

#### Where does it come from?

The above consumes our reflection on:

- Recommendation 3 Provide for Safety and Inclusion (point III in the *Takeaways*)
- Recommendation 9 Innovate in Free Knowledge (point V in the *Takeaways*)

#### HORIZONTAL:

Priority IV

#### WE WORK, WE LEARN, WE ADAPT

#### What does it look like?

We have a regular, comparable, and easy process of measuring the perception and satisfaction of people mandating us to carry out EU policy and advocacy work. It focuses, among others, on communication, clarity, transparency, opportunities for inclusion, quality of methods.

We have a refined set of metrics that respond to the specificity of policy and advocacy. This includes feedback-seeking process built in and budgeted in any major project or ongoing programme with dedicated funding.

In the COVID-19 era, we are ready to evaluate priorities and processes and shift focus to those that serve our community best in any potential economic and political downturn resulting from the pandemic.

#### Examples of work to do:

20. Requesting internal support in better defining the needs and scope for evaluation and monitoring system
21. Requesting external consultancy on the topic to incorporate tailor-made solutions

#### Where does it come from?

The above consumes our reflection on:

- Recommendation 4 Ensure Equity in Decision-Making (III in the *Takeaways*)
- Recommendation 10 Evaluate, Iterate and Adapt (I, III, IV in the *Takeaways*)
- Recommendation 11 Thou Shall Not Be Afraid. Strategy in the COVID-19 Era (I, III, IV in the *Takeaways*)