▸ Dissemination and Exploitation Activities - 2

D8.8.4

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SEVENTH FRAMEWORK
PROGRAMME

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0.9	22/10/2015	Full report	Vishal Kapadia
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Executive Summary

Y2 progress

Since the mid term review, WikiRate as a consortium has progressed in line with the strategy articulated in the extension (resubmission) of D8.8.3. Input from WP7 has figured heavily in articulation of this strategy. That strategy, in a nutshell, was organised around some key data goals:

- Bringing together in one place all of the quantitative data about companies' sustainability
- Standardising the data, making it accessible and analysable
- Community generation of new data
- Producing a comprehensive account of how each company behaves through Ratings and Wiki content

WikiRate has continued to develop relationships with advocacy groups to pull them onto WikiRate.org and has expanded the automated population of content. WikiRate also has buy in from a first advocacy group Ranking Digital Rights, who have expressed interest in testing their (open) data with the WikiRate calculated metrics concept.

We feel confident as a consortium that as we move towards the first community partnership pilots with advocacy groups there is a compelling rationale for other advocacy groups and communities to use the WikiRate platform to build ratings, engage community and share their existing research.

Quantitative data partnerships have been established with Carbon Disclosure project, Union of Concerned Scientists, and Greenpeace. Qualitative data (pdf reports) have been shared by SOMO and Good Electronics Network among others, which has been useful towards scoping projects in the towards the electronics initiative.

In terms of community engagement, we have a couple of metrics as case studies since the last review which indicate how crowdsourcing of metric values is possible and useful. We have worked to integrate members of Global Witness and Amnesty International with WikiRate community interest in conflict minerals to help them see the potential of WikiRate to populate metrics.

In Y3, WikiRate has already started to look at how to scale this offer, with the possibility of developing a student campus network (WikiRate X) aided by initial interest by 2-3 Universities

(Univ Hanze, Univ Rotterdam Erasmus, ESCP Europe) and also the interest of Amnesty international to work with their own community for a pilot project early in 2016.

With work towards calculated metrics, there is potential interest from Greenpeace to build a future rating on WikiRate around the global Detox campaign. Also, Ranking Digital Rights have verbally committed to sharing their (open) data on WikiRate, which is good test data for WikiRate calculated metrics due to the transparency of the indicators and overall availability of data.

As we look to scale the offer to advocacy groups we want to connect these groups with interested or active communities. Initial research suggests that this will be well served by pilots in the classroom with professors interested in open data and complementing case study based learning around sustainability. We also hope to work with existing student groups to craft WikiRate X, an international group of student communities at universities in the global north and global south.

Snapshot of Year 3

2016 will see growth in the efforts to engage both advocacy groups and their communities. Whilst the focus is on one or two solid case studies WikiRate will be looking to scale this to more advocacy groups and communities in advance of approaching companies in q3 of 2016.

2016 will also see WikiRate starting to interface more directly with companies. New functionality supporting company *Inquiries* is scheduled for deployment in late July (see the development plan in D6.6.2). Further, WikiRate's involvement in Reporting 3.0 conference and a stakeholder engagement forum at the global Global Reporting Institute conference will give ample opportunity for WikiRate to present and test engagement with companies on the metrics and ratings that they will see on WikiRate.

As we roll out multilingual structures late in 2016, we expect WikiRate to dive in to metrics, which cover grassroots issues. Such grassroots issues could concern labour conditions in developing nations from which materials or products are sourced, or environmental impacts which are not obviously associated with companies in developed nations. These metrics, bring accountability to issues, which can be influenced by larger companies. Due to disconnection from deeper levels of a supply chain, companies could be directly or indirectly financing poor labour practices or environmental abuses. This deep dive and connectivity can highlight, which companies are effectively managing risk in their supply chain and lead to clear examples of

approaches that other companies can learn from and follow. This fits with WikiRate's vision to encourage a race to the top among companies.

D7.7.2 builds on the business plan articulated in the resubmission of D8.8.3 to craft achievable and reasonable targets to achieve success towards WikiRate objectives. WP8 has benefitted from the input of WP7 and WP3 to guide interactions and scope approach in line with business plan targets; which are feasible and desirable. WP8 (WikiRate e.V.) will continue to align closely with input from WP7 Cambridge to sense check targets and progress in an agile manner towards further goals.

With regards to sustainability of the project, Y2 has seen conversations with individual private donors initiated, including the Chairman of the WalkFree foundation. Maximum donation limits have been set to ensure diversity of funding and lack of dependence on any one corporate, or ultimately governmental source such that the mission would not be compromised by such dependence. Work has progressed to produce a fundraising pack. Which will be distributed in q2 of y3 to potential donors, foundations and governments.

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Figure 1: Summary of Advocacy group progress

1 Following the updated strategy and plan:

Since the midterm review, WikiRate as a consortium has progressed in line with the strategy articulated in the extension (resubmission) of D8.8.3.

The background to this strategy and new targets earmarked in line with this strategy are outlined in D7.7.2 which is submitted in parallel. D6.6.2 outlines the development plan which also is synchronised with D8.8.4 and D7.7.2. D7.7.2 crystallises and evolves the strategy earmarked in D8.8.3 in line with adjusted objectives which are achievable, worthwhile and when fulfilled will make WikiRate in integral resource in a segment which never previously existed: providing free information about company performance across metrics, which anyone can contribute to, access and use.

The attached WikiRate 'Content Roadmap' is a central document which pulls together both targets and phases to the marketing in line which are supported by the development objectives. This document is further supported by the 'Content and Activity Roadmap', which sets targets that will be used to track progress towards making WikiRate a relevant, interesting and exciting resource for principal stakeholders. Broadly speaking the plan is:

Stage 1:**Seed the platform** with data scraped and sourced from Advocacy groups

Stage 2: **Engage communities** with this data and work with communities to refine and classify existing data and produce additional data

Stage 3: **Draw the attention of companies** to metrics and engage them to contribute directly to the WikiRate platform.

Stage 3 requires attention of a citizen lobby as a stick to complement the carrot of increasing their transparency score on WikiRate. As articulated in D7.7.2

"*Metric values which are entered directly by a company representative will represent the point at which the companies entering values perceive a competitive advantage in being well represented on WikiRate. The first companies to do so are likely to be companies that already market themselves towards 'ethical consumers', seeking to publicise their ethical behaviour on WikiRate. When a company representative enters metric values for their company on WikiRate, this will represent a move towards greater transparency on the part of the company. The longer-term objective is that companies will modify other aspects of their behaviour to improve their values and ratings on WikiRate..*"

This citizen lobby will be aided by making the information about companies comprehensive, relevant, accessible and unified. Bringing in natural communities engaged with producing data which ends up on WikiRate will help develop this lobby, whilst making the content accessible, shareable, authoritative and relevant will make it clearer where companies should be compelled to engage with WikiRate.

1.1 Progress towards goals

Stage 1) of the plan has progressed well since the mid term review. As of the time of writing, 3926 companies are covered on 129 live metrics on WikiRate.org with a total of over 22,500 metric values. This is formed by data scraped from various sources, combined with reachout to advocacy groups who have shared data that they have produced through their own company research. These numbers are held back slightly by metrics and their values needing to be matched with company entities on WikiRate.org and the need to grow our database gradually enough to allow for any needed performance optimizations. These numbers will therefore increase significantly as more of the already scraped data is shepherded onto WikiRate.org with appropriate company matching.

As we have more data on WikiRate.org, we are also able to attract more data. So far three organisations have committed quantitative data to WikiRate: the Carbon Disclosure Project, The Union of Concerned scientists and Greenpeace. Two further organisations (WWF and Ranking Digital Rights) have pledged to donate data in the coming months, whilst CDP are evaluating the prospect of sharing emissions data on all the companies that disclose information to them (c.4000), including previous years' data alongside that.

The next step in terms of seeding the platform with useful and navigable data is around calculated metrics. Discussions progress with Greenpeace and Ranking Digital Rights around building ratings on WikiRate as the new mechanisms are available and deployed. These are two ideal test cases with the former a large advocacy group familiar with constructing ratings and engaging followers around results; whilst the latter is a group working with open data from the start including full transparency around indicators, making their data a very high quality candidate for assimilation onto WikiRate.org.

Stage 2 of the plan relies on WikiRate building on relationships with advocacy groups to engage their members with population of new metric values, and consumption of data already present on WikiRate. A pilot is lined up with Amnesty International for Early 2016, building on work done by the WikiRate community around conflict minerals in the supply chain of consumer electronics companies. WikiRate aims to help advocacy groups match themselves with communities that they are either i) not currently engaging, ii) are engaging in a different way, or iii) have not yet engaged. As expressed in more detail in D7.7.2 WikiRate's offer aims to help advocacy groups engage their members beyond clicktivism, where a member is simply clicking on something (e.g. a petition) to offer their support, to get those individuals engaged more closely with the issues, data and some level of activism. WikiRate's primary offer for year 3 to such groups is to set up additional pilots between advocacy groups and their natural communities. Work done to crowdsource metrics of varying levels of difficulty and interest have proved most important to help advocacy organisations understand how such interactions work on WikiRate. Two existing (see footnotes for links) example metrics and projects articulate a very easy metric[1] for a community to populate, and also how a slightly more complex metric[2] can be populated on WikiRate with a clearly articulated methodology. By showing these metrics, and developing further metrics for pilots, we have more examples to show other advocacy groups to increase trust and belief in feasibility of such projects working for them as an engagement tool.

Within Stage 2, we are also looking to engage advocacy groups that may not have community, but that have expertise. For example, also within the conflict minerals space, we have connected members of the advocacy group Global Witness with community members to discuss which metrics would be most important to cover. They are now in discussion with Amnesty International about which metrics to frame for the pilot project; and have helped us as a group come up with metrics on a graded scale from very easy to progressively harder.

Additionally WikiRate will offer pilots that pair Universities and their students with advocacy groups to help find further individuals to get involved in crowdsourcing projects. Initially WikiRate is targeting Universities with professors teaching around sustainability and/or applications of open data, who have already expressed interest in using WikiRate as a complement to teaching.

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[1] Metric: **http://wikirate.org/Sebastian_Jekutsch+CSR_Report_Available**, Project: **http://wikirate.org/Creating_and_populating_metrics_reflecting_availability_of_CSR_reports**

[2] Metric: **http://wikirate.org/Richard_Mills+Publishes_Smelters_Refiners**, Project: **http://wikirate.org/Determine_whether_companies_published_a_3TG_smelter_or_refiner_list**

Different stakeholders also are invited to create profile pages (see CDP as Example) for their organisations, so that they can showcase metrics, sources and initiatives they want their members to get involved in on WikiRate. CDP, Greenpeace, Good electronics Network have already created pages through WikiRate team help; but we hope that this becomes a more regular interaction as we progress to pilots. We would like to see various stakeholders represented with their profile pages including companies, advocacy groups and universities.

In general we have an internal funnel which we use to measure targets and progress in terms of trust, and belief in WikiRate, as well as willingness to supply either data, community or indeed form a partnership to either Crowdsource metrics with their community; or build a rating on WikiRate in the future.

Funnel Level	Indicators/ description	#of Organisations at this level
0 – All Advocacy organisations	All organisations doing advocacy	
1 – Not yet Targeted by WikiRate	All potentially relevant organisations	21
2 – Targeted by WikiRate	All organisations which are relevant now	9
3 – Aware of WikiRate	Initial contact with Organisation acknowledged	5
4 – Interested in Concept	Interest stated **or** some level of referral	3
5 – Belief in Concept	Time budgeted, follow up scheduled	5
6 - Trust Feasibility	Data shared, **or** metric framed/designed	5
7 – Trust Partnership	Willingness to endorse/refer their partners	2

Figure 1: Summary of Advocacy group progress

1.2 Progressing to stage 3

As articulated above in more detail Stage 3 looks to draw the attention of companies to metrics, and to contribute directly to the WikiRate platform. This stage builds organically from the previous stages, where we expect to have a more powerful citizen lobby generated from advocacy group interactions and communities already working on WikiRate. The 'WikiRate Content Roadmap', attached, describes some of the deployments which will help us achieve this goal, and also the focus for next year as we aim to bring companies onto WikiRate in Q3 2016. Prior to engagement with inquiries, WikiRate e.V. will work with Kaleidoscope futures to set up some conversations with company representatives around the Global Reporting Initiative conference in May, 2016 in Amsterdam, where WikiRate will be running a parallel forum. WikiRate is also striving towards deeper company engagement with involvement in Reporting 3.0, another major sustainability reporting conference taking place in Berlin, which WikiRate will be speaking at and running a workshop for in November, 2015.

Stage 3 relies also on making company information on WikiRate unified, accessible, understandable and reusable. The work towards ratings in q1 2016 will be essential to promoting the ratings to a wider audience through earned media, PR and social media. WikiRate will leverage already developed relationships with Advocacy organisations, especially with advocacy organisations that have contributed data, community, framing of metrics and/or are looking to build or crowdsource ratings through WikiRate.org. WikiRate's aim is to bring more advocacy groups into and through the funnel from interest to partnership in q1 and q2 of 2016. As more case studies and pilots with advocacy groups emerge, we envisage an easier sell to adjacent advocacy groups and communities looking at other issues, with similar challenges.

Through the above strategy WikiRate aims to satisfy the increasing content and activity goals as articulated in the 'WikiRate Content Roadmap' and 'WikiRate Content and Activity Roadmap' spreadsheet. A central part of this strategy will focus on bringing together content with topics of wide interest and importance. A major target topic concerns anything which crosses over with the newly unveiled UN Sustainable Development goals (SDGs). Beyond the initiative of **SDG Compass**, which articulates some metrics which are relevant to the UN SDGs there are no clear indicators of how corporations can measure and compare their impact and progress towards achieving the highly ambitious SDGs by 2030. These goals are commonly agreed as critical for ending many of the world's problems, from climate change to water usage and poverty. However, there has been substantial coverage indicating that there isn't enough being done to measure progress, key performance indicators, as to how these goals can be achieved.

WikiRate is well positioned to take up the mantle of constraining such goals within topics and metrics.

Similarly WikiRate can take on wider topics such as Conflict Minerals, where a successful case study with Amnesty International, Global Witness and the wider WikiRate community can create an authoritative rating based on transparent metrics on WikiRate.org. Such topic pages can become an invaluable point of research on companies. Similar topic pages which could emerge in 2016, working with advocacy groups, and eventually companies include: executive compensation, gender diversity, and perhaps (pending a deeper partnership with CDP and/or 2 degrees project actors) climate change.

The first case study that WikiRate aims to work towards focuses on Conflict minerals. As of the time of writing this report, there is quite some interest from Greenpeace's global detox campaign, which could lead to another interesting and well populated topic. In a nutshell the content strategy for WikiRate will focus on building case studies which are replicable and aim to connect advocacy groups with communities to crowdsource and where necessary scrape data to create compelling metrics and open, transparent ratings, ripe for company engagement.

2 Maintaining WikiRate and sustaining the project

WikiRate continues to operate on a non-profit model and is looking to diversify its funding in 2016. As of Huddle VII, WikiRate e.V. shared an initial list of possible donors, and classified the type of donors we are looking for. The potential donors fall into the categories of: 1) foundations (corporate or independent), 2) governments, 3) private donors. As of Q1 2016, WikiRate will distribute a fundraising pack to a targeted list of donors, tracking interactions on Salesforce, with a view to developing a relationship and securing funds before the end of the project term. WikiRate has already started conversations with the Chairman of WalkFree foundation along with 1 other potential private donor. Once ratings are fully deployed in Q2 2016 and alongside the promotion of Ratings, WikiRate will look to enhance its search for funds to support a small but sustainable team to keep WikiRate and its servers running. At Huddle VII limits of total funding that any corporation or one donor could contribute to WikiRate, such that independence and neutrality may be maintained.

The initial limits set were as follows:

- Foundations: €200k
- Corporate foundations: limited to €20k
- Institutional asset managers: (universities with endowments): limit 20k, with commitment
- Philanthropists: Limit €200k, with commitment (annual donation)

As WikiRate progresses relationships with advocacy groups, we will seek endorsements of the value and importance of the platform. We already have quotable interactions from conversations with Greenpeace, Amnesty International, Global Witness and CDP. We hope to add to this with more concrete content to back up both the feasibility, importance and utility of the platform in our pitch for donors.

3 Conclusions

WikiRate's reachout strategy has progressed well to complement the seeding of data on WikiRate.org. As we move to community engagement, success in 2-3 pilots will help us expand our reach and offer to other Advocacy groups and communities.