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A How-To Toolkit for Civil Society Engagement with Digital Platforms and Telecommunication Companies



Greater Internet Freedom
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Table of Contents

Introduction	4
Best Practices for Engaging with Digital Platforms and Telecommunication Companies	5
a. Research.....	5
b. Develop Clear Objectives and Strategies	5
c. Familiarize Yourself with the Company	7
d. Deciding on the Type of Engagement.....	8
e. Reaching out to the Company	8
f. Use Evidence to Support Your Arguments	11
g. Follow up After the Meeting.....	11
h. Leverage Social Media to Create Awareness.....	12
i. Track Progress and Measure Impact	12
j. Celebrate Success	13

Introduction

The goal of this toolkit is to equip civil society organizations with recommendations, guidelines, and insights, so they can be better prepared to plan and carry out engagements with digital platforms and telecommunications operators. The guidance provided is primarily geared towards organizations and researchers that have used the [Ranking Digital Rights \(RDR\) Corporate Accountability Index methodology](#) to assess the human rights commitments of technology companies in their local contexts. However, we also aspire for this toolkit to be helpful for other researchers and advocates even if they haven't used RDR's methods and standards.

In the following sections we have included the fundamental best practices for engaging company representatives, together with templates to show potential communication flows of these interactions, so you can adapt them to your needs.

Transparency is only the first step towards holding digital platforms and telecom companies accountable. It is paramount that independent stakeholders, especially among civil society, push companies forward, engaging in discussions that help guide their behavior and practices to be increasingly rights-respecting. Using transparency as the driving factor enables us to leverage various aspects and dynamics of businesses and how they operate:

- **Trust:** Transparency builds trust between companies and their users. When people know how their data is handled, they can make informed decisions about how to use specific services and to what extent they can trust the company with specific types of data or use cases. Leading to longer lasting customer relationships.
- **Accountability:** When companies fully disclose their policies and human rights commitments, it enables a broad range of stakeholders to keep track and monitor how the company's actions follow said commitments and call out any behavior and practices that put people's rights at risk.
- **Competition:** Pushing companies to be more transparent and ranking them against their peers creates incentives to spark a race-to-the-top, where companies compete to improve their disclosed policies and practices. People increasingly value companies' commitments to protect their data and respect their privacy as part of their choices to use an online service or app.
- **Compliance with regulations:** In many countries, there are laws that require companies to be transparent about their data practices, and new legal

obligations that require companies to publish transparency reports and carry out human rights impact assessments will spread throughout the globe. By engaging with companies in the early stages of new regulations being discussed, you can help guide their internal conversations flagging specific concerns and human rights risks in your country, while providing a framework to identify how those risks are connected to the company's lack of transparency.

Best Practices for Engaging with Digital Platforms and Telecommunication Companies

a. Research

It is important to undertake RDR research with support from the Ranking Digital Rights team before approaching a digital platform or a telecommunication company. The resources needed to undertake this research can be found here: <https://rankingdigitalrights.org/research-lab/> and in case of any questions, the team is accessible on this email address: info@rankingdigitalrights.org.

- While the RDR Research Lab contains a more detailed overview of the process, we have extracted the following points that are important to keep in mind to achieve objectives when engaging with Tech Companies.
 - Identify the research goal (advocacy, focus on one large companies or major players)
 - Determine what research is carried out in the region and whether it's necessary to build relationships with companies.

Pro tip: Why did you choose us?

Companies will most likely raise the question as to why you choose them as a company to research, so make sure this is highlighted during your meeting with them. A response could be that the company was chosen because it is the largest telecommunications company, by subscriber base, in that country.

b. Develop Clear Objectives and Strategies

After undertaking the RDR research and familiarizing yourself with the company on the tier policies and operations, one should develop clear objectives and strategies for the engagement.

Here are some tips on how to create clear objectives:

1. Start by identifying your goals. What do you want to achieve through your engagement? Do you want to raise awareness about an issue? Do you want to change a policy? Do you want to influence decision-makers? Once you know your goals, you can start to develop objectives that will help you achieve them.
2. Make sure your objectives are specific. Decide the specific findings within the report that you want to address with the company.
3. Make sure your objectives are measurable. How will you know if you have achieved your objectives? For example, you could say "I will measure my success by tracking the number of human rights disclosures company X puts in place."
4. Make sure your objectives are achievable. Are your objectives realistic and within your reach? If not, you may need to adjust them.
5. Make sure your objectives are relevant. Are your objectives relevant to your overall goals? If not, they may not be worth pursuing.
6. Make sure your objectives are time-bound. When do you want to achieve your objectives?

When developing the objectives, one should consider the specific digital rights issues they are seeking to address, the companies they are targeting, and the desired outcomes they hope to achieve. RDR's examples of clear objectives include conducting research, creating a standard for accountability and providing data and information which will help to protect and promote human rights in the digital age.

The next step is to develop clear strategies. This will help to identify the most effective tactics to achieve the objectives. When developing strategies, one should consider the specific issues you want to address, what approach you take and what specific actions you will take to achieve your goal.

In addition, one should consider best practices and case studies of successful engagement efforts with companies, such as successful campaigns or initiatives that have led to changes in company policies or practices, and case studies of companies that have demonstrated leadership on digital rights issues. Lastly one should conduct research on the company's operations to gain an understanding of the processes and activities that relate to the collection, use, and protection of data, as well as the ways in which technology is developed, deployed, and managed in digital rights.

c. Familiarize Yourself with the Company

It is important to familiarize oneself with the company that you plan to engage with and be knowledgeable about all the relevant information that is publicly available before contacting them. Here are some practical tips on how to familiarize yourself with a company:

- Read the company's website. This will give you a general overview of the company's business practices and its stance on various issues. Key documents to look out for are their human rights policies, the company's privacy policy, code of conduct, annual reports, and public statements on social issues, to get a better understanding of the companies' stand on digital rights, including what they have committed to. This information can be useful when engaging with them as you can leverage their commitments.
- Look into the company's organizational structure. It is important to understand its ownership, whether it is fully owned or controlled by another company, or is a state owned company; the company leadership, the board of directors, senior leadership teams, and the different departments in the company such as the human rights department, a policy team, or a legal team. This is essential as it will guide you in developing your engagement plan.
- Look for news articles and reports about the company. This will help you to understand the company's track record on issues such as data protection and user rights.
- Talk to people who have worked with the company. This could include employees, customers, or even shareholders. They can give you their personal insights into the company's culture and practices.
- If the company is publicly traded, you can attend shareholder meetings. You can start by searching for "investor relations" materials on the company's website, to familiarize yourself with the type of information that is published for shareholders. These materials can often include internal analysis on specific situations that affect their products or services, providing you a window into how the company perceives external threats to their business and operations.
- Once you've figured out the key representatives that would be strategic to interact with, be on the lookout for events where they participate. This is a great opportunity to ask questions and get a better understanding of the company's perspective on the issues you are concerned about.

Once you have familiarized yourself with the company, you will be in a better position to advocate for change. You will know what the company's current policies are, and you will be able to develop your engagement plan.

d. Deciding on the Type of Engagement

The decision on how you will engage with the company depends on several factors, e.g. location of the participants who will take part in the meeting, the availability of stakeholders to meet physically, and the availability of funds. You can decide on hosting a virtual meeting with the company, a physical meeting with the company and other stakeholders, or a webinar in the event that you are launching the report, and you intend to invite the companies that have been covered in the report.

Pro tip: Organizing a stakeholder engagement meeting

One of the ways to engage with a company is by organizing a stakeholder meeting, bringing together the company representatives, civil society representatives, policymakers, industry regulators, and other relevant stakeholders. You can begin by making a presentation on the methodology, and the report findings and recommendations. You can then follow up with an open discussion on how the various stakeholders in the room can be involved to achieve the recommendations of the report.

e. Reaching out to the Company

Once you have developed a clear objective, strategy and decided on the type of engagement, it is time to make contact with the company. This can be done in two ways:

1. Contact them directly through the contacts that you have available to you, preferably through an email address.
2. If the company is a Global Network Initiative (GNI) Member, you can reach out to the team at GNI to support connecting you to the company assessed. You can check if the company is a GNI member through this link: <https://globalnetworkinitiative.org/#home-menu>

When reaching out to them, make sure your message is clear and concise with as much detail as possible. If you are reaching out for the first time, make a point to introduce yourself, stating why you have reached out to them, introduce the research undertaken, and let them know that you are requesting a meeting to discuss the research findings and recommendations.

If you subsequently reach out to them to invite them to a meeting to discuss the report, make sure you share the report, state when the meeting will be, where it will be held, and the participants/organizations that will be represented in the meeting.

Pro tip: Send them the report in advance of the meeting

If you already have the contacts of the company representatives who will attend the meeting, or the representative you have been in communication with, send them the report that you will be discussing ahead of the meeting, preferably not less than seven days before. This will give them an idea of what to expect and for them to prepare in advance of the meeting, so that you have a fruitful discussion.

Pro tip - It is in good faith to share an embargoed copy of the report with the company before it's published, making it clear that the embargoed copy will not change. This allows them to respond to your findings and recommendations before it's publicly posted

Sample email to the company ahead of the meeting

(introductory email)

Dear Naila,

My name is Ayrana Zuri, currently working as a researcher at Internews. We have been undertaking research looking into your company's public commitments and policies to advancing the freedom of expression and privacy of users.

We are writing to you today to inform you that our research is now complete, and we would like to discuss with you our research process, findings and recommendations before we publish the report. Kindly let us know if you would be interested in meeting any day this month and we can discuss this further.

We look forward to hearing from you soon.

Sincerely,
Ayrana Zuri

Sample email 2 after they respond

Dear Naila,

Thank you for making time to take part in this meeting. I write to share with you a few updates ahead of our meeting next week.

We will have 10 participants in the room from GNI, Ranking Digital Rights, Internews and partners who are part of the Greater Internews Freedom (GIF) Project at

Internews.

For the agenda, we will take you through the research methodology, key findings, and key recommendations; with 30 minutes for open floor discussions on the findings and recommendations. We will finish with a conversation on the way forward and next steps. Please find the tentative agenda [here](#).

Lastly, the event will be held at The Blooming Rose Hotel, in Lakeville town. Please feel free to reach out in case of further clarifications, and I look forward to seeing you on Thursday.

Best regards,

Ayrana Zuri

Pro tip: Who should be in the meeting?

It is important to let the company know the number of participants who will take part in the meeting, and the organizations they represent.

Pro tip: The first meeting with the company

During the first meeting with the company, start by introducing yourselves so that everyone knows who is in the room, the organization they represent, and their respective roles. Secondly, start by introducing the Ranking Digital Rights research methodology, so that the company representatives have a picture of the indicators used in the research and how the research was conducted. After the presentation on the methodology, discuss the research findings and the research recommendations. After this, open the floor for discussions. Allow the company representatives to comment on the report, and to give their feedback, if any. Finally, discuss the way forward. Are you going to have follow-up meetings with them? Will you have meetings with other companies? This will help the company prepare in advance and look out for further communication from you.

Pro tip: Build Relationships with Key Decision-Makers

What follows next is building relationships with key decision-makers in the company. This can help to advance one's advocacy goals by identifying senior executives and legal departments in the company and reaching out to them to introduce yourself and your organization. Try to schedule a meeting or call or

contact them through their website, social media channel or email to discuss the company's policies and practices related to digital rights.

f. Use Evidence to Support Your Arguments

At the meeting use evidence to support your arguments and convince the company to take action on the issues raised. Use data, case studies, and research to demonstrate the impact of the company's policies and practices on digital rights. For example, you can use statistics on the number of data breaches affecting users, or case studies of individuals whose digital rights have been violated, to illustrate the need for stronger data protection measures. After the meeting, follow up on any action items that were identified. Finally, regular communication and follow-up can help ensure that they remain aware of the issues and the importance of protecting digital rights. If the private sector agreed to take action, follow up to ensure they have done so. If they have not, ask for an explanation and suggest ways they can move forward.

Pro tip: What to highlight in your presentation at the first meeting with the company

When making your presentation on the findings and recommendations of the report, ensure that for each indicator you are discussing, highlight the key findings and cases in the country or from another country, to show the importance and implications of the report findings.

For example, in a country that experiences network shutdowns; when making the presentation on freedom of expression and access to information indicators, highlight that the company has not disclosed circumstances under which they will disrupt access to the internet and other online platforms such as social media and instant messaging apps and services; highlight that the country has faced network shutdowns in the past, and the impact of such a shutdown to the people in that country, and then recommend that the company publishes the relevant policies.

g. Follow up After the Meeting

After the meeting with the company, it is important to send an email to the participants who took part in the meeting. Thank them for attending the meeting, and most importantly, recap the key commitments that came out of the meeting, e.g., if the company stated that they would send you written feedback on their comments, remember to note that down. Also highlight any timelines that you have, so that they are aware that they have a time frame within which to send you their comments.

Sample follow-up email

Hi Naila,

Just wanted to say a big thank you for making time to join us at the meeting yesterday. We appreciate that you honored our invitation and all the feedback and comments on the report.

As agreed, please send us your comprehensive feedback on the report by the end of next week, and free to reach out if you need further clarification.

Have a great week ahead.

Best regards,

Ayrana Zuri

Pro tip: Give them time after the meeting to send back feedback

Often you will find that companies need time to discuss the report with their team members/other departments in the organization before they send their feedback on the report findings back to you. Feel free to give them some time after the first meeting to do that and send back their written feedback on the report.

h. Leverage Social Media to Create Awareness

Social media can be a powerful tool for creating awareness of your campaign and reaching a wider audience. Use hashtags, petitions, and other online tools to amplify your message and engage with supporters. Share your research and evidence on social media to make your case more visible.

i. Track Progress and Measure Impact

Tracking progress and measuring impact is crucial to evaluate the effectiveness of your engagement with the private sector. Set clear benchmarks and monitor the company's actions on digital rights. Collect feedback from supporters and stakeholders and use this feedback to improve your strategy.

j. Celebrate Success

In the end, recognize progress no matter how small. Acknowledge any steps the private sector has taken towards protecting digital rights and thank them for their efforts.

Pro tip: Leverage the expertise of others

It is important to leverage the strengths and expertise of your partners. For example, GNI is a membership organization, and some of its members include telecommunication companies. GNI is therefore in a good position to guide the team on how best to engage with telecommunication companies, how to frame messages, who to reach out to, and how to plan a successful engagement.