

OPEN SOURCE ACTIVISM

SELF ACTIVATING, SELF ORGANISING ACTIVISM
THAT CROSSES THE BOUNDARY BETWEEN THE
INTERNET AND THE STREETS

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Abstract

This dissertation examines three cases of 'Open source activism' – activism where people rose up to take action without having been externally motivated or organised, and each activist acted according to their own abilities and insights to further a common goal.

In these three cases the activism came into existence spontaneously, gathered momentum, and successfully crossed the boundary from online action to offline activism. This dissertation examines the commonalities and the differences between the movements, and uses theory of animal models of self organisation (Jaap van Ginneken) and the Motivaction Mentality model (Motivaction) to draw conclusions about how this phenomenon works, and its significance to communicators.

At present we find that the application of open source activism as a communication tool is limited; it cannot be created, though if circumstances are already existing, it could be encouraged to come into existence, as in the presidential campaign of president Obama. Even then it is an unpredictable process and most organisations will find that in most situations, open source activism could sooner be a risk than an asset to their communication strategy. However as organisations and communication styles move ever more toward the principles of co-creation and other forms of interactive producer - user relationships, it is likely that open source activism will become more common, and that organisations will develop means to communicate with activists and make use of the creative energy present in such campaigns.

For these reasons open source activism is relevant to communicators; it can be both an asset to an organisation and a danger, and in both cases it is vital that organisations know how to react to such activism and how not to adopt a siege mentality but to keep communication lines with activists open.

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Chapter 1 Introduction

1.A: Introduction

During the election campaign of Barack Obama, an untold number of people actively joined the efforts to get him elected. Unlike previous presidential campaigns, these numbers were not just made up out of professional campaigners and organised, registered volunteers. Thousands of people who had, for the most part, had no previous interest in actively getting involved with elections, self-mobilised and contributed their time and effort. They made videos, weblog posts and T-shirts. They organised local events to promote their candidate. They engaged the people in their environment. They raised money for the election campaign.

What compelled these people to do this?

In February of 2008 the Church of Scientology was suddenly faced with protests in front of its buildings, as thousands worldwide showed up to protest the organisation's activities. The protesters wore masks for their own safety, feeling they were at risk of retribution from the Church of Scientology.

The protesters loosely self-identified as 'Anonymous' - both a name and a description. The vast majority of the participants did not know each other's names or had even seen each other's faces.

When the Church of Scientology reacted in accordance to their own policies, by attempting to find the leaders to disable them, church officials refused to accept that there *were* no leaders. It seemed that some people had simply decided that they were going to protest - and others joined them. No central organisation, no leaders. In the chaotic and anonymous corners of the internet where the movement was born, ideas were pitched, and the amorphous mass of activists adopted or dismissed them.

People contributed time, money and effort. This ranged from video making skills, contacting known opponents of the Church of Scientology, writing press releases, using press contacts, making banners and signs, alerting authorities to abuse within the Church of Scientology and compiling information packages, to money for flyers, transport and food.

What happened? How did this happen?

In December 2009, a seventeen year old single shot to the top of the music charts in the United Kingdom, beating what had been thought to be the shoe-in winner. Many thousands of people bought the single specifically in those weeks to achieve this victory.

What happened? How did this happen?

Though these three occurrences are completely separate, they have several things in common.

- 1) self activating / self selecting participants
- 2) self organising activism
- 3) both online and offline activism

What they also have in common is their success. The grassroots movement to support Barack Obama made a significant difference during the election and may have been the crucial factor resulting in his presidency. Anonymous succeeded in shaking the Church of Scientology to its core, bringing scattered opponents together, and in bringing international attention to the abuse within the organisation. The Christmas charts campaign succeeded in reaching number 1 for their chosen single.

What compelled these people, many of which not previously known for activism, to take up such a cause and contribute their time and resources to it? How did communication play a part in the development of such a movement?

1.B: Research Question

What is open source activism, and how could it be useful to communicators?

The advantages of a movement as described in the introduction are obvious – it is a self-replicating, word of mouth wave of action, with creativity, diversity and drive, and

has great power to inspire people. Because the call to action comes from peers, it is not generally dismissed as marketing and subsequently ignored.

If communicators could cause such a movement to happen, it could have many uses. However, is it possible to do this? How would a communicator go about this? What are the deciding factors in the success or failure of such an attempt?

In this dissertation, first we will examine three separate instances of open source activism, and then analyse both their participants and the movement conventions and communication styles. With this information we will be able to examine how an open source activism movement works, and if it has usefulness for communicators.

To answer these questions we will be using theory about self organisation by Dr. Jaap van Ginneken, mass-psychologist and media expert, to examine the types of movement and organisation. Second we will use the Mentality™ models of Motivation, a Dutch communication and market research company, to examine the kind of people that get involved in such movements.

Chapter 2: Theory

Open source activism movements can be typified by their unconventional organisation styles; by definition they have a bottom-up organisation, not a top down. In most cases there may *be* no top.

2.A: Jaap van Ginneken's Animal Models of self-organisation

Jaap van Ginneken theorises in 'De Kracht Van De Zwerm' [1] that you can look at the natural world for models of (self) organisation. He presents five models

Ape-Wolf

- ❑ Pyramid model of hierarchy with clear leadership. Very strongly top-down.
- ❑ Individuals have a clear personal identity within the group
- ❑ Little to no decision making power or input in the lower tiers of the hierarchy.
- ❑ Very little (recognised) feedback loops
- ❑ A risk of groupthink at the top.

An example of the Ape-Wolf model would be the company Enron, where the leader and his immediate surroundings got so caught up in their own superiority and power that they lost all touch with what the rest of the world thought acceptable.

Sheep-Cattle

- ❑ Strongly conformist
- ❑ Only somewhat hierarchic
- ❑ Synchronisation in behaviour and appearance lowers risk to the individuals
- ❑ To deviate is to be perceived as a danger to the group
- ❑ Us against Them thinking
- ❑ Panic spreads rapidly and has profound effects.

An example of the Sheep-Cattle model is the stock market, where a minor incident can quickly lead to mass panic (the human equivalent of a stampede) and to a crash of the market.

Birds-Fish

- ❑ Have no leaders, but there are experienced individuals whose choices have more influence than others.
- ❑ Experience of individuals helps the collective to remember/orient itself.
- ❑ Variety of individual and synchronised behaviour
- ❑ Has some form of individuality and subcultures

A physical example of this model would be a flash-mob; a group of people who each have decided to do something and end up forming a whole through synchronisation, not leadership.

A negative form of this effect would be when a crowd turns into a riot; a group of people that has synchronised in purpose and mood can experience a rapid shift in mood, and without leadership or discussion the individual identity takes a backseat to collective identity. That way it can happen that a peaceful protest can turn into a riot, a rebellion, or even more far reaching, a revolution.

A non-physical example would be media opinions that often shift rapidly and in synchronisation with no clear indication of who – if anybody – started the shift.

Bees-ants

- ❑ Strongly bottom-up model of organisation. No leaders.
- ❑ Individuals constantly take initiatives
- ❑ The collective grows and changes through trial-and-error and feedback loops.
- ❑ Individuals contribute to the system and their shared common conscious forms the 'brain' of the community.
- ❑ Individual knowledge is stored centrally (with bees, in the structure of the honeycomb)

Examples of this process are the growth of Silicon Valley from small town to international technological hotspot. The process of the development of Silicon Valley shows the interconnectedness of different aspects of the technology branch, and how responsive such a settlement is to feedback loops.

Another example would be the financial market. The laws of supply and demand work with a specific set of feedback loops that regulate variables – something that works because of, not in spite of, personal self interest.

Virus-bacteria

- ❑ Self replication and propagation. Each instance 'infects' several others.
- ❑ Constant and fast, exponential growth
- ❑ Can morph and adapt according to circumstances and is therefore virtually unstoppable
- ❑ Can evolve rapidly – the successful forms replicate, the unsuccessful forms die off.

An example would be internet meme's – certain phrases or concepts that intrigue people and 'stick' with them. (this concept is called stickiness). Memes connect to people because they are interesting, poignant or (and most often) amusing. Sharing them with others gives people a sense of community and connecting over shared values.

We will use these models in analysing the three cases examined in this dissertation.

2.B: MOTIVACTION

In looking at open source activism we are looking at movements, and therefore people, that are self-selecting. Nobody aims a movement at a certain subgroup of the population, because there is nobody at the wheel to aim it. People decide for themselves if the movement is something they are interested in.

It is therefore impossible to speak of a 'target group' in the context of open source activism. There is nobody to set the target.

It is however interesting to look at which people feel attracted to a certain movement, and what they share in terms of values and attitudes.

Motivaction is a Dutch marketing company that has developed the Mentality™ model [2] of looking at society, and this is a useful and interesting way to look at the participants of an open source activism movement.

It must be said explicitly at this point that the model shown below is based on Dutch society only. We have chosen to apply it to the internationally spread movements because while the division between the social groups will be different in each country, there are striking similarities between some of the social groups in the model and the attitudes and values held within some of the open source activism movements.

We will also include the generalised international (Western) model, which is much less specific and informative, for completeness sake.

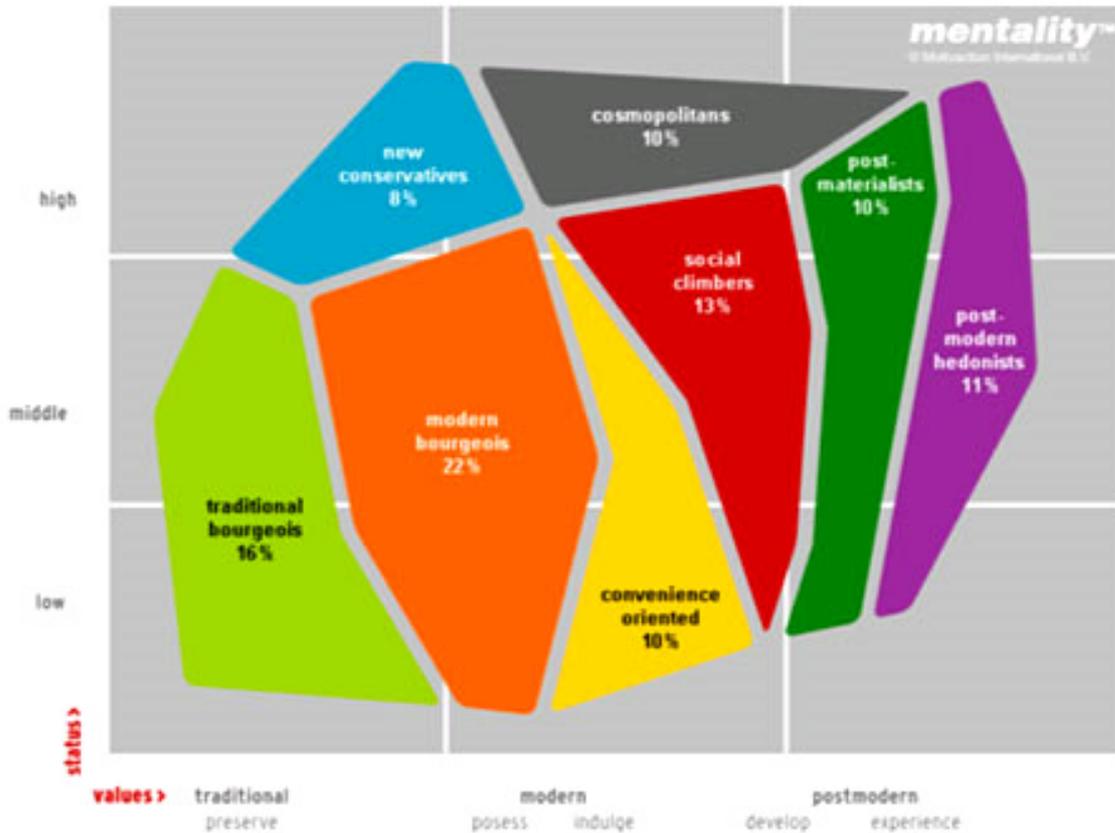


Figure 1 - Dutch model. Source: www.en.motivaction.nl

Traditional Bourgeois

The moralistic, dutiful, and intent on the status-quo bourgeois. They maintain traditions and attach to material possessions.

Convenience Oriented

The impulsive and passive consumer who primarily wants to have a carefree, pleasant and comfortable life.

Modern Bourgeois

The conformist, status-sensitive bourgeois that seeks balance between tradition and modern values such as consuming and enjoyment.

New Conservatives

The liberal-conservative upper layer in society that encourages technological development, but resists social and cultural change.

Cosmopolitans

The open-minded and critical world citizens that develop postmodern values such as personal development and experiencing, and integrate those with modern values such as social success, materialism and enjoying life.

Social Climbers

The career oriented individualist with a definite fascination for social status, new technology, risk and excitement.

Post-materialists

Idealistic and critical of society, these people want to develop themselves, take a stand against injustice in society, and want to preserve the environment.

Postmodern Hedonists

The pioneers of the culture of experience, in which experimenting and breaking with moral and social conventions have become goals of their own. [3]

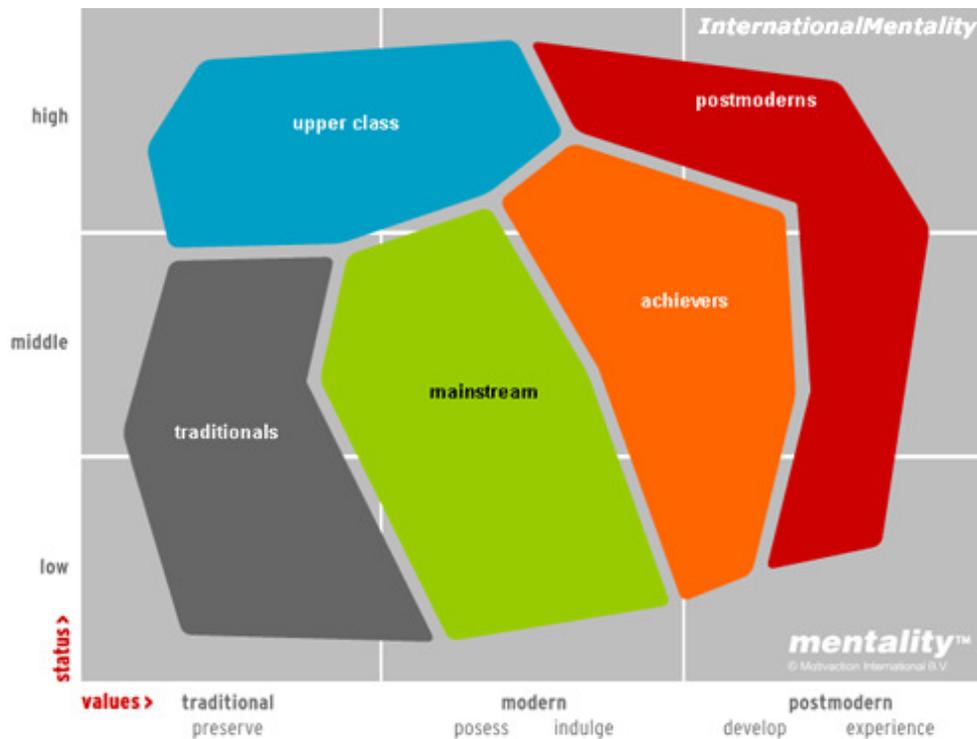


Figure 2 - International Model source: www.en.motivaction.nl

Chapter 3: CASE Anonymous vs. Scientology

In this first of three cases, we will examine exactly what happened in the most freeform occasion of open source activism.

*"Look at how the internet is acting like an organism! This faceless mass is speaking with a single (digitally synthesized) voice, has lightning-quick reflexes (they can't put up a scientology tent anywhere in the world without this faceless internet posse showing up 30 seconds later), is incredibly intelligent ('Anonymous' as an entity has a far more comprehensive understanding of Scientology than *any* individual - including their leader - ever could), and displays many human traits (reacts emotionally, gets bored, feels 'pain' - and then rage - when it is poked, has a shadowself, a persona, an id, an ego, a super-ego...) and so on. This display of intelligent behavior from the internet (as a meta-organism) is a direct result of the network design of the internet, and innovations in the variety of way that connections are made (through html links, message forums chat rooms, blogs, online news stories and their comments pages, digg, myspace, facebook, youtube, usenet, and so on). The 'hardware' includes BOTH the physical network AND the brains of the people that interface with the network through keyboards, mice, and monitors."*

-- anonymous about Anonymous [4]

3.A Sources

It is difficult to write about 'Anonymous versus Scientology' activism with any degree of authority. The nature of the phenomenon dictates that there are no official sources.

There are and were no spokespeople; or rather no spokespeople whose word represented more than (at best) a subsection of the participants. Mostly, anybody who spoke, spoke only for themselves.

Even 'official' communication from Anonymous to media sources, such as press releases, represented only a minority that had reached a consensus.

There are several reasons for this lack of official sources.

- The very nature of Anonymous put common goal ahead of personal identity. The movement was very anti-Ego. Stepping up to declare oneself a spokesperson was not generally received positively.
- There was no official or central communication output, only a message board where ideas were exchanged. The most consensus that was attainable was 'it looks like a lot of people agree'.
- The very realistic risk of infiltration by Scientologists, or even just by

troublemakers, and subsequent sabotage by speaking for the movement, encouraged the attitude of 'nobody speaks for all of us'. Anyone in a mask could claim to be part of the movement, therefore nobody was considered representative of the movement.

www.kesq.com, a local Californian TV station, has set out to make an investigative documentary about Anonymous vs. Scientology, and they encounter the same problem, though it is not clear if the makers fully realise that the information they take for facts are very limited facts.

Similarly the majority of media articles about Anonymous are based on information that is not representative, is incorrect or incomplete.

For the purpose of this research, we will draw information from

- The researcher's own participating observation in the movement
- Consensus information found on organisational forum enturbation.org (no longer exists) and its reincarnation <http://forums.whyweprotest.net/>

3.B Origins

The birthing grounds of Anonymous vs. Scientology were defined by anonymity and the complete freedom of speech that it affords. On a very high volume, very high speed imageboard ('Chan') that had anonymous posting as default, only ideas that attracted a lot of attention could drift to the top. Anything that did not attract attention from a lot of posters was quickly buried by new posts.

This method of deciding on action became a fundamental part of the movement. Popular ideas gained momentum – unpopular ones were simply ignored.

In January 2008 an online video appeared on the internet of actor Tom Cruise raving about Scientology. [5] Though to believers the video made perfect sense – and it was intended only for insiders – to outsiders the video and the actor appeared both disturbed and disturbing. The Church of Scientology, notoriously heavy-handed in

repressing unfavourable information, immediately set about legally pressuring the sites that published the video.

Internet censorship had always been a hot topic on the messageboard, and this event triggered outrage, and then action.

The first action was digital – members of the community executed denial of service attacks on Church of Scientology owned websites. This activity gained some wider internet attention, and critique to the illegal nature of the actions.

At this stage an influx of new activists started; many people who had a previous interest in the nature of the Church of Scientology and wanted to do something, now found likeminded people. These people brought their own values into the movement, a key one of which was a commitment to legal methods. This influx caused a rapid change of methods, from illegal digital to actual physical protests and other pressure methods. The movement called itself Anonymous, and also Project Chanology. A structure outside the original messageboard was quickly provided by individuals and became the homebase for most of the global communication.

The original imageboard, whose members also still call themselves Anonymous, quickly lost interest in the project. Its volatile nature and short attention span quickly turned to other amusement. There remains some overlap, both in members and communication styles, but it can be said that 'Chan' Anonymous is a very different entity than Anonymous vs Scientology. The second grew from the first, and then in a matter of weeks developed its own values, methods and goals, and continued to develop until they are now completely separate groups.

3.C Evolution

We could roughly divide the evolution of the movement in these stadia:

Anonymous v1.0: the messageboard where it started. Though the members may individually hold different goals, as a community Anonymous v1.0 is defined by the search for entertainment (often in extreme forms, and at the expense of others – 'trolling') , the expression of anger at certain events ('raaage') and, inexplicably, a love of cats.

Anonymous v2.0: this stage was reached at some point around the second physical protest. The movement had its own messageboard (enturbation.org) and after the wide publication of the first protest, an influx of new people. The flood of people not familiar with the original group culture brought on significant changes, especially in what, as a group, was deemed acceptable behaviour and what wasn't. Most of the newcomers were also specifically committed to protesting against Scientology, and brought a certain amount of professionalism with them. Media awareness increased, and press releases were written for each protest.

In this stage Anonymous was also joined by many long-time Scientology protesters and ex-members. Their presence both motivated and intensified the actions.

Anonymous v3.0: this is a stage that slowly grew in the autumn of 2008. The large protests were losing popularity as the weather deteriorated after summer; when it became apparent that individual locations could no longer mobilise large numbers for a street protest, new tactics were developed. Small, spontaneous protests, lobbying, awareness campaigns, letter campaigns etc. At the writing of this document, many of these things are still taking place.

3.D Self Analysis

Within the movement the word 'hivemind' was most often used to refer to the system of cooperation. Individuals each take the initiative contribute whatever they can, be it time, effort, money, organisation skills, a specific expertise – and a coherent whole emerges. The terms 'hive' and 'flocking' were used by Anonymous activists to explain the movement to outsiders.

There was awareness that the swarming effect that this produced; decentralised, flexible and adaptable activism, is also a military tactic. More significant for the demographic, swarming frequently encountered in video games, and was this an easy to understand concept for the majority of the participants. It is worth noting however that swarming is not a tactic that was adopted, so much as that it occurred naturally, and was then recognised and refined.

As a whole, the movement was quite self aware, with many of the participants just as fascinated by what developed as some media seemed to be.

3.E Internal communication conventions of the movement

The communication properties within the movement had a few interesting commonalities.

Evidence based - "Pics or it didn't happen"

Communication within the movement was based on providing solid proof for any claims that were made. There was a prevalent attitude that unless proof had been given (in the form of photos or documents), the claim was fake. A leftover from the original image board where the movement was born, and where nothing was true until proven otherwise, this attitude turned out to be very useful to avoid acting on rumours and planted stories.

High value on transparency and information accessibility

High value was placed on information openness. Everybody should be able to check source material for themselves. "Don't take our word for it" became a credo both within the movement as in communications to the public. To facilitate that, information gathering projects took place. Several people would research a topic, compile information, and share the resulting document publically. In some aspects the group operated like a 'hive mind' and members of the group were continually working to gather, process and make available new information to the hive.

Action-oriented - "Getting shit done"

Communication was based around efficiency. Because there were no leaders, it was easy to get bogged down in mass discussions where hundreds of people wanted to say their piece and no conclusion was ever reached. To combat this there was very high value placed in undertaking action. Most people agreed that while long discussions could sometimes be useful, they did not necessarily actually

accomplishing anything, whereas physical activism – "Feet on the street" – was valued much higher.

Efficient, succinct communication – "Too long; Didn't read"

Another inheritance of the original image board was a writing style that was adapted to an extremely short attention span. Verbosity was discouraged by replying with 'tl;dr' which stands for 'too long; didn't read'.

While this could be discouraging for those who put a lot of effort in their long posts, it did enforce extremely concise communication styles, which was a great advantage in a movement as information-flooded as Anonymous. What could often be observed was that in in-depth discussions, people wrote a brief 'tl;dr version', in essence a summary, for those readers who were skimreading the discussion. This made it possible for a small group of people to have in depth discussions that did not get ignored or cut off from the wider pool of activists, which benefitted the entire movement.

The shortening of attention spans is widely considered to be a property of people under 25 – those that have grown up with the internet and the constant flood of information it brings. We will investigate this more in Chapter 5.

Many people lament this shortness of attention, seeing in it a decline of literacy and damaging academic prowess. Indeed it seems hard to understand how someone limited by attention span can succeed in the information flooded world of today. However, it seems that in a system that is willing to embrace 'attention span challenged readers' and automatically accommodate for them, there seems to be very little decline of literacy and of depth of discussions, and indeed it has advantages of keeping complicated discussions central instead of getting sidelined because not everybody was interested to the same level of depth.

Not Your Personal Army

This credo helped to keep the movement to stay truly consensus based, and to avoid one person or subset of people to have an overly strong influence on the agenda of the movement. In this way it helped keep the movement on track

Communication by memes

Meme is a word that was coined by Richard Dawkins in his 1976 book *The Selfish Gene*. It refers to "a replicator, a unit of cultural transmission, or a unit of imitation." [6] Memes can be ideas, symbols or practices that replicate and can change and evolve in the process. One of the most universal memes could be 'belief in an afterlife'. On a smaller scale, memes can also be a particular phrase, image or action. Memes can be particularly fast spreading and evolving on the internet. Examples of such memes are 'LOLcat' images, and 'Rickrolling'.

While according to Dawkins, memes are self serving in the same way that virii are, they have benefit for people as well – they can help shape understanding and bonds between people who might otherwise have little in common. While the participants of Anonymous could be very diverse in terms of background, location, values and beliefs, there were shared memes, almost a common language, that created bonds between them.

Humour

Humour was important from the start of the movement – Anonymous v1.0 started action in part simply because it entertained them. While the cause got more serious as time passed, and many activists were sincerely committed to making a real difference, humour remained a much used tool.

It was very well understood that one could not ask a thousand people to show up each month of the protest was a grim humourless business. So the protests were sometimes more like street parties, with music, cake, singing and dancing. Many protest signs drew attention with humour and pictures of cats.

The further advantage of keeping things light was that the Church of Scientology displayed no sense of humour whatsoever, and thus the whimsy Anonymous employed contrasted with the deadly seriousness of scientology. Many activists found that this made them more approachable to the public.

Ensuring that activism was fun is likely one of the main reasons that the movement continued and evolved after the first few months.

3.F Communication paths

Wiki's

The use of wiki-style websites, where everybody could contribute information, was very much integral to the movement. It fit with the values of not having a leader, information accessibility, and action-orientation. There was no excuse to sit and wait for somebody else to do something – activists had all the tools to take action at any moment.

Youtube

The trigger for the Anonymous vs. Scientology activism was on youtube.com, in a video message to Scientology that announced protests against Scientology, but was in fact more a call to action for those protests to happen. Throughout the movement Youtube was a much used medium – to broadcast ideas, advice and information to each other, to broadcast the movement position to the public to generate understanding. There were also many different messages to members of Scientology. Anonymous wasn't the only one to use Youtube to reach out – video messages also appeared from various other parties, declaring support or criticism, and a dialogue of sorts took place there.

Youtube became a feedback loop once the street protests had come into full swing. Activists posted videos filmed at protests, of the crowds, the music, the cake, the signs, different protest styles – and this in turn inspired other people and places to organise such events.

Messageboards

Day to day communication, idea proposing and discussion mostly took place on message boards. Moving away from the *anonymity without personal identity* of Anonymous v1.0, where every poster was simply called Anonymous and there was no way to build any sort of interpersonal relationship, the message boards gave the option to use a personal alias. This facilitated the building of connections and relationships, posters establishing a reputation for certain skills, and it became easier to organise events.

Internet Relay Chat

For real-time communication, especially with smaller groups such as local cells, Internet Relay Chat was a popular medium. It made it possible to remain anonymous, and have rapid, fluid communication and discussion. IRC was often used for the organisation of practical actions, and made it possible to act on extremely short notice. Especially in large cities like London, it was not uncommon for a report to come in that a Scientology personality test booth (a recruitment method) had been spotted, and for locals to immediately coordinate a small response group to head to that location to picket.

Social networking sites

Included as point of interest due to its notable *absence* in the Anonymous movement; perhaps unexpected considering the all-pervasiveness of sites like Facebook and MySpace. However it is easily explained; though a high percentage of Anonymous activists used such sites, they were not used for communication about activism because it was too easy to trace, and anonymity could easily get compromised. The need to remain anonymous means that the vast majority of direct interpersonal communication took place via more 'old fashioned' means such as messageboards and IRC, where maintaining anonymity was easier.

3.G External communication conventions of the movement

One of the attributes that set Anonymous apart from numerous internet based activism campaigns was its media awareness. Some of the participants started early on with writing press releases. As the movement gained momentum people with all sorts of expertise came forward and provided writing skills, media contacts and exposure. People turned their attention to the information war. New information about Anonymous and its cause was constantly being compiled and put out for the media. Youtube was a much-used medium to publish thoughts, considerations and evidence. Media attention that the movement received was collected and followed, and there was a semi-organised system of providing feedback and additional information (or corrections) in comment sections of online articles.

Chapter 4: CASE Obama campaign

...the campaign also seems to recognize that some volunteers won't cotton to a top-down system, and its web tools accommodate independent efforts. Ms. Scanlon started her work for Obama with the South Tampa team, but felt the campaign wasn't sending enough volunteers to canvas her hometown Plant City, a working-class suburb that voted for Bush in the last two presidential elections.

Obama's organizers insisted that that they needed to focus their efforts on more densely populated surrounding areas.

"I just didn't feel good about that," she says.

So Scanlon took matters in her own hands by tapping into the campaign's online Neighbor-to-Neighbor tool on myBo. In two days last September, she knocked on 50 doors to sniff out support for Obama, entering her neighbors' responses into the campaign's databases through myBo...

Wired.com - Obama's Secret Weapons: Internet, Databases and Psychology [7]

4.A: Sources

Sources for this case file are two-fold: information about the election campaign was found in American and international media; as the campaign was happening and in retrospect. Most of these sources are 'traditional media': newspapers (even if read digitally) and television news broadcasts. [8]

Information about various grassroots initiatives was mostly found through Youtube, blogs, social networking sites such as Facebook, and reporting by digital news organisations. [9]

4.B: Start/origine

For the purpose of this research, we will define 'election campaign' as the campaign that was ran from the moment that Barack Obama won the primaries and officially became the Democratic candidate. This was on June 3, 2008.

The Obama presidential campaign focused from the start on using new media. While the Republican campaign mainly used TV as a medium to bring across messages, the Democratic campaign used the internet. There were videos on video-sharing websites like YouTube, updates available by text message and email, policies available via a website, and Mr. Obama had a presence on social network sites such as Facebook and MySpace.

Through the use of sites that encouraged a dialogue, the campaign message began to live more rapidly among supporters than it might have in a purely static format. Youtube invites people to respond with video messages, which others can respond to again, and this makes it possible for people to debate in the environment where especially those under 30 are both widely present and comfortable.

It was a hallmark for the campaign that Mr. Obama and his message were easily accessible for all age groups, and specifically for young people. Where politics has traditionally been at the over-40s, Mr. Obama's style of communication, invitation to dialogue and online presence drew an unprecedented interest from the younger generations. Because the campaign message focussed on working together toward a goal and explicitly encouraged participation, many people who might otherwise not have become involved, felt moved to join the action.

While there were a great many campaign-organised volunteer projects, this case file will mostly focus on which projects were organised spontaneously by people not affiliated with the campaign organisation.

4.C Life cycle

The open source activism aspect in this situation was not one coherent campaign, but many small initiatives roughly following a pattern that was dictated by the progression of the election year. We can therefore not speak of evolution; the word lifecycle is more appropriate in this instance.

The life cycle of the open source initiatives around the presidential campaign very loosely followed the AIDA (Awareness, Interest, Desire, Action) model

- Create awareness and interest

At the start of the primaries, a lot of attention focused on bring voter awareness to Barack Obama as a person, his history, his viewpoints. While this was aimed at the general public, there was also a lot of attention for the democrats who had supported Hillary Clinton. This attention was renewed in late August 2008 when the Republicans announced Sarah Palin as running mate.

- Create desire to vote

Once there was a lot of general awareness of who Obama was and what his viewpoints were, attention among campaigners turned to 'floating voters' and those who had no intention or motivation to vote. Low turnout and apathy made it important to address this segment of the population and convince them to vote – ideally for Obama, but it was a message often brought independent of voting choice arguments.

- Facilitate action

In the final stage of the campaign the attention turned toward practical matters; talking (again) to people who were not convinced, and especially facilitating people to go and vote. Helping people with absentee ballots and arranging transport for those who did not have any was a major part of this.

There were also fund-raising initiatives that were less closely connected to this lifecycle.

4.D Internal communication conventions of the movement

The campaign leaders rolled out a sophisticated system that was designed to motivate and organise people to motivate and mobilise others.

The traditional campaign style as used by McCain in his campaign, is centred around community strongholds. The republicans have traditionally used churches to reach the people on the ground, the democrats have often used labour unions. These pre-existing organisation structures were used to mobilise people and spread influence.

The great advantage of this method is that volunteers are relatively simple to mobilise and to direct – it is a natural development that the leaders of such an organisation would direct the efforts made by its members. If the campaign organisers want to direct the volunteers themselves, the structure for this is in place, and the volunteers will generally already be a community to a certain degree, and often a cohesive group.

Though the social context of a church and a labour union are very different, they have in common that their power structure is established, accepted, and easily used by campaign organisers. This style of campaign organising is very much top-down.

The campaigning system that Barack Obama used for his presidential campaign had a completely different style. It centred around empowerment – giving individuals the tools and the support needed to set effective and realistic goals, and reach them.

The main tool was the website called mybarackobama.com, which was modelled on social network sites such as Facebook and MySpace. On this site, Obama supporters could find other local supporters and easily organise themselves into action networks.

Model Adopted From Harvard Research

The controlled chaos of Obama's ground game owes a debt to the civil rights and farmworkers' movements of the past, as well as lessons from the 2004 campaigns, and an organizational-team theory developed by Ganz and colleague Ruth Wageman, a psychology professor at Harvard, in a recent project for the Sierra Club.

In 2003, the Sierra Club realized that its local grassroots volunteer programs weren't effective. In late 2005, it commissioned the Harvard scholars to undertake a two-year research project to figure out why, and how to fix it. The researchers discovered that the kind of volunteers that the Sierra Club attracted were "lone ranger" types who focused on accomplishing goals on their own, rather than effectively working with others with "shared purpose."

The danger of this approach, Ganz says, is that individuals burn out easily. They try to do everything themselves rather than breaking the goals out into specific tasks that members of interdependent teams can accomplish in pieces. That's why relationships are so important, they found. Ganz and Wageman's model gets members of teams to find out more about one another's experiences, and draw on each member's expertise. The model also uses personal storytelling during workshops as a way to motivate peers and potential recruits to action.

Wired.com - Obama's Secret Weapons: Internet, Databases and Psychology [10]

4.E Communication paths

Social networking sites

Various social networking sites played a large role in the activism surrounding the Obama presidential campaign. Sites such as Facebook and Myspace facilitated finding others who were supportive of Barack Obama and interested in activism to support his campaign.

The campaign employed Chris Hughes, one of the founders and shareholders of Facebook.com, to set up a social networking site specifically for Obama supporters. This became <http://my.barackobama.com>, which became the main tool through which self-organisation could take place. [11]

Wiki's

Wiki type sites were often used as a way to collect information and spread it to the outside world. The immediate, collaborative character of wiki sites facilitated participation and contribution from all levels. An example would be <http://www.barackopedia.org/>

Youtube

A medium that played a very large role in the presidential campaign was Youtube.com. Speeches were quickly put online, made available to those without access to traditional media. Any individual or organisation who had an opinion to share, a creative work to showcase, a song to sing – anyone could make video and put it online. These creative works were often encouraged, but not organised by the democratic campaign leaders. Political organisation collective MoveOn.org started a contest to make the best 30-second promotional video, and found many famous actors, filmmakers and artists willing to support the cause by judging the contest. (<http://www.obamain30seconds.org/>)

Messageboards

Because of the prevalence of social networking sites, messageboards were not as prevalent on a large scale; on a smaller, local scale they did have their use to enable communication between various activists within an initiative.

Property statements: Car stickers, Yard signs

A communication means more common in America than anywhere in the world, is to announce one's political leaning via messages on property; car stickers and signs in yards.

While the direct persuasive power of such messages seems very limited, they can still have a powerful impact; they foster a sense of community among the supporters. It is possible for someone to be a complete stranger and to still feel a sense of kinship to them if they support the same candidate.

Car stickers, yard signs and similar communication means also contribute to the 'feel on the street', a palpable (if not reliable) sense of public opinion, which can contribute toward swaying people. If it seems like an entire street supports Obama, a floating voter might be more open to voting Obama because it feels like the 'winning team'.

Apparel: buttons, T-shirts and hats

Almost more than persuasive power, messages on apparel seem designed to communicate something about the identity of the wearer. If the foremost thing someone wants everybody they encounter to know is that they support a certain candidate, then that carries a connotation of value for that candidate. Reversely, if a candidate is popular, the wearer of the apparel can also use this 'brand image' to attach to their own identity. It was fairly common to see celebrities wearing Obama apparel, sometimes even to red carpet events.

Similar to property statements, the wearing of Obama apparel also contributes to the 'feel on the street', a palpable (if not necessarily reliable) sense of public opinion, which can contribute toward swaying people. If it seems like a great many people you encounter support Obama, a floating voter might be more open to voting Obama because it feels like the 'winning team'.

4.F External communication conventions of the movement

In the myriad of initiatives that fall under the open source activism banner, the external communication styles were so diverse that it is meaningless to sum them up. All the

different styles that were used did have something in common: They were tailored to the situation.

From small local initiatives such as undertaken by Ms Scanlon in Plant City (see the start of this chapter) to The Great Schlep, a national campaign that encouraged young democratic Jews to talk to their aging, Florida-dwelling parents and grandparents about Obama [12] – communication could be adapted to the target group.

It is this adaptability that makes open source activism so powerful; and in the case of the Obama presidential campaign, it is likely that the many narrow focus initiatives filled up the gaps that the official campaign inevitably left, and thus made a significant contribution in the eventual win.

Chapter 5: CASE Christmas Charts Campaign

[...] the fact that the audience now, mostly comprised of young adults, are watching television and the computer at the same time, thus creating fully involved viewers. [...] while on the face of it – it may seem our audience is distracted – but the truth is that they are our most highly engaged audience!"

[...]

"Right now, I think we are at a very exciting moment, the fusion of broadcast and social media. But it is a merger with a third element – where the viewer becomes our co-creator."

Elisabeth Murdoch, Chairman and CEO of Shine Group [13]

5.A: Sources

BBC articles [14] [15]

Facebook page [16]

5.B Origins of the movement

The number one in the music charts at Christmas has historically always been an important event in the United Kingdom – a source of much interest, anticipation and betting. However, since in 2005 the television show The X-Factor became popular, with media mogul Simon Cowell and an enormous marketing budget behind it, the number 1 spot has inevitably gone to that season's winner of the show.

That this met a fair amount of resistance among the British public was no surprise. In 2008 various online groups tried to campaign their chosen song to the top; however because the opinions were divided on which song that should be, the ultimate goal of number 1 was not reached.

Alexandra Burke, the X-factor winner, reached number 1 with her rendition of Leonard Cohen's song Hallelujah. A campaign to put Jeff Buckley's version of the song at the top ended on number 2. The campaign for the original song version by Leonard Cohen reached number 36. The difference between numbers 1 and 2 was small enough that it's possible that had the different campaigns agreed on a song, it might have won.

5.C Lifespan of the movement

Late in November 2009, a facebook campaign was started to get the 1992 Rage Against The Machine song *Killing In The Name* to number 1 in the Christmas charts. Initially the members of the group pledged to buy the single as soon as the eligible period had started. Along with the pledge to buy the single, the campaign urged participants to donate to UK charity shelter.

When the eligible period began, the chosen song very quickly appeared in the charts, and its 'out of nowhere' climb was noticed in the media and reported on. This media attention fuelled the campaign, and brought it under the attention of celebrities, many of whom spoke out their support in turn. Positive mentions by artists such as Sir Paul McCartney, Dave Grohl, Stephen Fry, Bill Bailey, band members of Muse, The Prodigy and Stereophonics and on popular music stations all added to the spread of the campaign.

The real media attention came when the members of Rage Against The Machine became involved, gave statements and interviews, and generally did their part in encouraging the campaign.

On December 24 it was announced that *Killing In The Name* had beaten the X-factor winner, Joe McElderry, and that the campaign had also raised over 60 000 pounds for Shelter (this later rose to over 100 000 pounds)

The band has since announced a free concert, with tickets b for participants, in Finsbury Park London

5.D Internal communication conventions of the movement

This movement was uniquely short-track. Unlike the much more complex campaigns of Anonymous and the Obama supporters; there was only one goal (get more singles sold than the X-factor winner) and only two ways for participants to achieve that goal – to buy the single themselves, and to encourage others to buy it.

It is in this case hard to differentiate between internal and external communication; a person becomes a participant the moment they buy the single, and with that act they have also done the single most important thing the movement wanted people to do. Once someone was a participant, there was not much more action to undertake. Participants to the movements communicated via the 'wall' on the Facebook group page, and reported where they has promoted the group and the campaign. Reporting

progress and being praised by fellow participants worked mutually encouraging. The campaign was also the sort of subject that was enjoyable to share with friends, so it was something participants liked to talk about with each other and with other people; spreading the word was often not a conscious promotion effort, but simply a subject of conversation.

While there was someone who took the initiative for the action, it is hard to speak about leadership; there simply wasn't much leading involved. The two people that started the campaign, Jon and Tracy Morter, can be more accurately referred to as initiators; they started the Facebook group and did the first round of spreading the word about the campaign. Once the campaign had reached a certain threshold of people who knew about it, it started to go 'viral' and spread quickly across the UK and worldwide.

It is interesting to note that many media outlets considered this a traditionally organised campaign; the initiators were asked questions such as "Are you planning to do this again next year" and generally treated like they had accomplished the number 1 position for the track.

By the definition of this dissertation, the initiators provided the infrastructure, but more importantly chose a 'spark' (the 'Killing In The Name' track) that inspired people to action. The subject touched upon a frustration present in many people, about the state of music charts and the all-pervasive presence of the X-factor media machine. The campaign connected to a sense of humour and fun, and the specific song chosen (which features the repeated lyrics 'fuck you I won't do what you tell me') connected to a sentiment many people felt toward modern popular music in general, and Simon Cowell in specific.

The power of that well-chosen song did the real work; it appealed to a subset of alternative-music fans who already liked Rage Against the Machine, and the lyrics appealed to others who may not have been familiar with the band. People who were inspired, or amused, or who felt their own frustrations resonated by the campaign, spread it further. The initiators were convenient spokespeople for the campaign in its latter stages when the media wanted faces to feature in the coverage about the campaign, but they did not *lead* the campaign.

5.E Communication paths

Facebook

The campaign's main communication path was Facebook.com. The Facebook group that started it all was the hub of the activities and the source of information about the movement. It is possible for a group member to send invitations to everybody they have listed as friend on their profile, which is how word about the campaign spread so fast. It is also possible to share photos and videos.

Websites

A few websites were made by participants to spread the word about the campaign.

Interviews

Once the campaign started to get media attention, the initiators Jon and Tracy Morter gave a number of interviews.

5.F External communication conventions of the movement

As described under paragraph 5.D, it is difficult to speak of internal and external within the context of this movement.

Chapter 6: Process requirements

In looking at what the phenomenon referred to as 'open source activism' actually entailed, we established three basic properties that a movement must have to be considered open source activism. This chapter will explain these properties and explore them in detail.

- 1) self activating / self selecting participants
- 2) self organising activism
- 3) both online and offline activism

1) Self activating / self selecting participants

This property refers to the way that individuals become involved in a movement. In most traditional activism, an organisation calls up members or followers to undertake a certain sort of action. For instance, if Greenpeace determines that there is an issue that needs to be brought to the public attention, the organisation itself organises a campaign, and then it calls upon members to be part of it.

In open source activism, there is generally no pre-existing structure for reaching people, or only a very loose one. Activists are not called to participate by any sort of organisation or structure. The initiative to involve oneself with the movement is completely self selecting.

This means that there is no target group in the traditional sense of that term. There is nobody planning or designing the movement, and therefore nobody to decide or aim for a certain group of people. Those people who hear about it and feel moved to action by the campaign get involved, those who do not, don't.

A grey area within this property is when a *person* calls others to action, and we have chosen to define this by looking at how much influence that person has, and how much reason to believe that their call will be followed. For instance, if a blogger with a few hundred readers calls their readers into action, the expectation is different than if a popular columnist in a widely read newspaper does the same.

Another difference would be how specific that call to action is. The person asking others to participate may be involved in the movement themselves, or they might simply have heard of it and deemed it a worthy cause to put their influence behind. In this case there is not a clear dividing line but rather a sliding scale, and whether or not a movement would fall on the side of self activating would depend on the other factors.

2) Self organising activism

This property refers to a lack of pre-existing organisation within open source activism.

Traditional activism generally has campaign leaders and some form of central organisation that coordinates the efforts of individual activists.

To fall under this definition of open source activism, no central organisation structure can be present. Any activist is free to organise whatever initiative they feel fits best with the goals of the movement. Others can then chose to follow this example or organise something else; in practise this can turn into a self-regulating effect within the movement.

In fact the entire principle of open source activism depends on the preparedness of individual activists to step up and take action without external prompting.

There are obviously differences in how this property manifests itself in the three example cases; this will be further explored in chapter 9.

3) Both online and offline activism

Over the past ten years activism has conquered a place in the online world and there are now many forms of activism that do not require the participants to leave their computer chairs; such as online petitions, digital information dissemination and email campaigns. Both within activist and academic communities there is much discussion about how productive and useful these online forms of activism actually are, and if they should be considered activism at all; this dissertation makes no attempt to define what 'real activism' is and if online activism falls under that definition.

The existence of self-activating, self organising online campaigns is no new development; the internet has facilitated the development of such structures since it became commonplace. Examples of this could be the emergence of complaint campaigns about TV programs or commercials that many people considered offensive.

The crucial step that makes open source activism something new and remarkable is the step from the online world to the offline world; the moment that a self-activating, self-organising movement manages to have an effect outside of the sphere of the internet. This effect can range from an offline effect of online organisation and action, such as in the Christmas Charts campaign, to extensive offline activism with thousands of people on the street.

The ability to put people in the street is perhaps the most crucial benchmark of a movement that has strength – because its participants are visibly willing to invest time and effort and to put themselves on the line for their cause.

This last requirement is where budding open source movements stand or fall; it is where participants show their commitment to the movement, or their lack thereof. A budding online open source movement that organises an offline form of activism (eg, a street protest) will find out, on the date of the offline event, if its participants are invested in the movement enough to fulfil promises and take their activism to the next level.

If the offline event is a success, this generally strengthens the movement and may lead it to organise more offline events and attempt to get more people involved. If the offline event fails, this has undeniable repercussions for the movement, and it may lead to the conclusion that the movement is not as open source as previously thought. In a truly self-organising environment, if the decision is made to take offline action, each participant is speaking for themselves: "I will be there" not "You should all be there." If it does turn out that nobody turns up (or only a few people; perhaps those who proposed the event) then the conclusion can be drawn that something went wrong in the decision making style; perhaps there was not the mass consensus that

appeared to be there, or perhaps participants are not as personally committed as they seemed, and each assumed that somebody else would turn up.

In the next chapter we will examine what the common factors are among participants in open source activism – what sort of people join such a movement, and therefore, if a communication professional would wish to cause such a movement, what should they look for in a target audience?

Chapter 7. Common factors in open source activists

In this chapter we will explore several factors that, all coming together, make it possible for open source activism to happen. These factors set the scene, as it were, and show the cultural and social developments that form the birthground of open source activism.

7.A The Internet Generation

It seems likely that part of what makes open source activism possible is the attitude of people toward the internet and its users. If in the past, users seemed to regard the internet and the people encountered online as abstract, almost an alien world. People would speak of 'online vs the real world' and of meeting someone 'From the internet'. The attitude seemed often like, that what happened on the internet was not as substantial as what happened in the physical world, and the distance to other users was so great, in an emotional sense, that few people seemed to regard the other users of the internet as *really real*.

Over the last five years that has changed significantly.

With the rise of social network sites such as facebook and myspace, and programs like MSN and Skype, it has become more and more common to use the internet as a way to connect to people that are already known to the user in person. Where in the past this contact was mostly kept via email, it is now on webpages, an interconnected network instead of one to one contact. This new style of contact has decreased the gap between online and physical world significantly.

We could say that most people born in modern Western countries after 1985 became active online early enough to get comfortable with it to a degree that few people of earlier generations are. Having more or less grown up alongside the internet, these young people use digital means of communication seamlessly alongside other means of communication.

However, this style of internet usage is not unique to the generation born after 1985. People who have a close connection to digital developments, for instance IT

professionals, have often been close enough to the evolution of the internet that they have adopted digital communication styles in a similar way as the internet generation.

Where most people still use the internet as a tool, a means to achieve an end, this 'Internet Generation' has truly made the internet a part of their life, interconnecting things like school, friends, family and hobby, facilitating contact with friends distant and near.

Because of this decreased distance between physical and digital, the step to meeting people via the internet is also smaller. If it's possible and comfortable to only speak to a distant friend online, the step to meeting someone who is only known via the internet isn't so large. With the distance between physical and digital thus reduced, it is quite natural for members of the internet generation that online action can have consequences and results in the physical world. They know for a fact that the people they speak to via the internet are users behind a keyboard just like them. They use the internet to organise activities with friends, and the so the concept that an online group of people would agree to take a certain action, and then execute it, is not so extraordinary to them. [17]

7.B The internet evolves - Web 2.0

Originally, the world wide web contained mostly static information. People and companies used webpages to give information to users; little to no reply or interaction was part of this. The internet was like a huge digital library. This is sometimes referred to as Web 1.0. In user style, Web 1.0 was a simple continuation from older media such as radio and television – in which there was an active sender and passive receivers. The internet was consumed.

What is sometimes called Web 2.0 is a style of internet use that has slowly come into use since roughly 2003 – where the internet is a much more dynamic environment. There is no longer a sender and a receiver, but people strive for dialogue, collaboration, social networking, video sharing, information sharing. A good example of Web 2.0 is Wikipedia – a project that can only exist through the efforts of tens of

thousands of people around the world adding information, expertise and energy to a common project.

Kevin Kelly, one of the founders of Wired Magazine and author of several books about internet and its development, wrote an article called *We Are The Web* in August 2005. He described the new internet like a brain, or a giant machine - encompassing all the computers, servers and cabling around the world, but crucially, also including all the people that use the internet.

"And who will write the software that makes this contraption useful and productive? We will. In fact, we're already doing it, each of us, every day. When we post and then tag pictures on the community photo album Flickr, we are teaching the Machine to give names to images. The thickening links between caption and picture form a neural net that can learn. Think of the 100 billion times per day humans click on a Web page as a way of teaching the Machine what we think is important. Each time we forge a link between words, we teach it an idea."

Kevin Kelly
We Are The Web - Wired.com [18]

Viewed in this light of increased participation, involvement and cooperation, it is easier to understand why someone would invest significant time and energy in activism both online and offline – the dividing line between how people think about, and behave in, the digital sphere and the offline world has become much fainter than it used to be. The culture of user generated content and collaboration also makes it more common that projects and situations are not lead by any one person, but that responsibility and organisation are shared between the participants. If participation in a project is completely voluntary and own initiative, people tend to have less tolerance for strong leadership, and it seems more natural to make decisions based on group consensus.

7.C Internet to Offline precedents

Open source activism is the surprising development of people connecting online for a common goal and turning that into offline action. However, it is by no means the first time that such a thing has happened. We will examine a few of such occurrences here in order to set the scene for open source activism.

Internet dating

One of the first instances of people connecting via the internet and then moving toward offline meeting was internet dating. The internet provides a good way for people to connect with others with similar interests, where physical distance would otherwise have prevented them from knowing about each other. Internet dating has become very popular over the time the internet has become publically accessible.

"17 percent of online daters--or nearly 3 million American adults--have turned online dates into a long-term relationship or marriage. That's exactly the same number of couples in America who say they met in church"

Mark Penn in his 2007 book *Microtrends*. [19]

Pub meets and other internet meet-ups

Years before the world wide web really started to get traction, USENET was already in heavy use. Newsgroups provided a simple and convenient way to communicate about a certain subject and were widely accessible in the early 90s. In groups that featured close communication and where people formed personal connections, meeting up was not uncommon. Alt.fan.pratchett, a newsgroup about fantasy author Terry Pratchett, had its first meet (of many) in 1992. [20]

Both internet dating and pub meetups are examples of internet users meeting up after contact via the internet – however they are both examples of people meeting offline after they had already made personal contact online. While there was concern about the other person not being who they said they were (a fear magnified by the media, wary of this strange new medium) this is nonetheless very different from meeting people when there had been no personal contact beforehand.

Flashmobs and smart mobs

The real precedent of online to offline gathering like it's seen in open source activism is commonly known as flashmobs. This term refers to a pre-arranged (often by open invitation) gathering of people in a public place. The first instances of flash mobs were often related to performance art, though they have also been seen to serve political and activism goals. Once assembled, the crowd generally does something to make a

statement, then disperses again. A large part of the attraction of flashmobs is often to surprise and intrigue bystanders; people who do not understand why a crowd or event suddenly starts happening. An example to this would be the silent disco flashmob event in London in April 2006; at a set time, participants would start dancing to music on their own mp3 players; inaudible for anyone else.

The fascination of seeing internet-organised events take place in the physical world is a large part of the attraction for the participants: the internet made flesh and affecting events offline.

7.D Shared common consciousness.

When we are looking at what could compel individuals to participate in street-based activism with virtual strangers, something that shouldn't be neglected is the factor of *shared common consciousness*.

With this term is meant – a certain frame of reference that is shared by members of a group (no matter how tenuous the connection of that group may seem to the outside observer). We could define this as separate from *group culture*, as members of a group with shared common consciousness may hold radically different values in life.

Nonetheless, shared common consciousness serves as a framework, through which a group of people interprets the same thing in roughly the same way, and lets this influence their actions.

For example, in the Christmas Charts Campaign, a group of people interpreted the band name and the lyrics of the chosen song in more or less the same way, and this united them in their actions.

Anonymous, especially in its early incarnations, consisted of people who shared a sense of humour, taste in music, video games and film and general pop culture. The feeling of belonging was strengthened by the prevalence of internet meme's – for instance, communication through film quotes and references, LOLcat (macro) images,

and references to shared group history. One of the most iconic images of Anonymous vs. Scientology was the widespread use of Guy Fawkes masks.

While critics looked for sinister motivations in this choice, drawing parallel to the blowing up of government buildings and terrorism, it is this researcher's strong belief that the use of the masks was mostly connected to a love for the cult film *V For Vendetta*. Through this film runs a theme of people acting anonymously behind a Guy Fawkes mask, uniting to great result. Most significantly there is the iconic scene of thousands of citizens marching, black clad and in masks. (depicted in figure 3)



Figure 3: iconic image from the film 'V for Vendetta'

Simply put, it is both the experience and belief of the researcher that a few people started to use the masks, others liked the way it looked and the reference to a favoured film, and the use of the masks rapidly spread across protests and countries. The simple explanation that something might be done because the participants decided it was cool, because they shared the same frame of reference of popular culture, was often bypassed in favour of more sinister motives – perhaps because what was happening was so hard to understand from an outside point of view.

The combination of the factors described above attempt to clarify what the birthground is for open source activism, and what factors in society are responsible for making it possible to happen. We looked at what the participants had in common.

In the next chapter we will examine what the *movements* had in common.

Chapter 8. Common factors in open source activism movements

In this chapter we will examine what the common factors between the three separate open source activism movements were.

Though the three occurrences are completely separate, they have several things in common.

8.A *Spontaneous individual action leading to a mass movement*

Open source activism works as a 'many drops onto a hot plate' movement – individuals are moved to action, at first privately, later often in some loose self-organised structure. Because each individual works toward the common goal according to their own values, insights and ideas, a very broad spectrum of action styles is covered. As many more drops join together, a coherent whole emerges.

8.B *No central organisation or leader figure*

As we have seen in the chapter about Anonymous vs. Scientology, there was no central organisation or leader, and indeed it was very much against the group culture to have or acknowledge or follow such a structure or person.

The factor seems not to apply to the Obama presidential campaign, because of course Barack Obama was the central figure to the campaign. However, at the level where spontaneous self activation and open source activism took place, Mr Obama was no longer a leader figure; there was no organisational structure surrounding the activists who operated outside the campaign volunteer structure. Mr Obama can be considered an inspiration to those people, and a cause, but at the level described for the purposes of this research, they were not being *lead*.

While in the Christmas Charts Campaign there was someone who took the initiative for the action, it is hard to speak about *leadership*; there simply wasn't much leading involved. The two people that started the campaign, Jon and Tracy Morter, can be more accurately referred to as initiators; they started the Facebook group, chose the song and did the first round of spreading the word about the campaign. Once the campaign had reached a certain threshold of people who knew about it, it started to go 'viral' and spread quickly across the UK and worldwide.

The power of that song did the real work; it appealed to a subset of alternative-music fans who already liked Rage Against the Machine, and the lyrics appealed to others who may not have been familiar with the band. People who were inspired, or amused, or who felt their own frustrations resonated by the campaign, spread it further. The initiators were convenient spokespeople for the campaign in its latter stages when the media wanted faces to feature in the coverage about the campaign, but they did not *lead* the campaign.

8.C An amorphous nature

The nature of a number of people all acting according to their own insight means that adaptation to changing circumstances is not only possible, but rapid and seamless. If most participants are acting as independent agents or in small groups, the timeline to changing tactics can be extremely short. Open Source Activism can adapt to almost any circumstance, and do it faster than any traditional organisation. If facing opposition, this is a significant advantage – the activists can stay a step ahead of the opponent simply because their organisation style is non-hierarchic and decentralised, making their response time much shorter than that of a traditional organisation.

Within the Anonymous vs Scientology movement, *amorphous* also meant that it was impossible to determine how many people were active at any one moment. People would join the cause, others would drift away, people would take a break – the anonymous nature of the movement made it impossible to see who, exactly, belonged to the group, as this was liable to change at any moment. People might drop out of offline activism but stay involved, or drop out completely but be drawn back by a big event. The movement was not a certain group of people, but consisted of people who were active in it at that very moment.

8.D Decision making by flocking

Without central leadership, it would seem that deciding on a common course of action would be a tedious process, involving extensive discussion and voting. While discussion and voting processes were certainly not unknown within either of the example campaigns, a lot of time decision making was a much more organic process.

Within Anonymous vs. Scientology, it was quite common for an individual, or a small group of individuals, to take an action or make a plan. They would publicise their actions in one of the communication channels – often the international message board. Others would then follow their actions – or they would not. In this manner ideas would either sink rapidly to the bottom (literally; no replies would make the post disappear into the volume of posts and out of sight) or get enough support to swim at the surface and thus get more exposure. If an idea reached enough support, critical mass would be reached, and that would end up being a new direction for the movement.

The entire Christmas Charts Campaign is an example of flocking – the initiators chose a direction, and others who liked it enough joined them, thus determining the direction.

8.E Preparedness to act and contribute without reimbursement

A very important factor in both movements was a preparedness in participants to act and contribute for its own sake, and with no expectation of reimbursement. People participated in activism because they felt the goal was worth their time, energy and money, and because it was its own reward; either the result (Obama supporters felt their efforts had been rewarded when Barack Obama was elected) or the process (Anonymous activists enjoyed the activism and events, and following from that, organised only enjoyable activism and events).

It can be concluded that self-activating, self-organising activism can only happen when the participants feel that what they are doing is rewarding in its own right, regardless of external motivators.

8.F A central role for the internet / modern communication styles

The internet, with its ease of facilitating rapid interaction between physically remote users and its low boundaries, is an essential factor in open source activism. It would be impossible for large scale open source activism to take place without the internet; any attempt without physical proximity of all participants would get bogged down in the communication channels.

8.G Media engagement from within the movement

An interesting occurrence within the Anonymous vs. Scientology movement was that from a very early stage on, the movement was very aware of, and interested in media coverage. From the second street protest onward, media statements and press releases started to get written by common consent) for various actions.

In the various Obama campaign initiatives, any media attention was positive, and there were efforts to engage local media.

8.H A common goal that united people

From media coverage it would be easy to get the impression that Anonymous consisted solely of males in their late teens and early twenties, loners and outcasts finding refuge in an internet collective of peers.

While it is true that the described demographic made up the majority of the original Anonymous (v1.0), as the style developed, new people from all across the demographic board joined the movement. By summer, the only three things that all activists had in common were:

- Critical of Scientology
- Active on the internet
- Willingness to contribute time and effort

Because so little else was held universal apart from the criticism of Scientology, the movement was very diverse and adaptable, and efforts from the Church of Scientology to define it or pin it down were unsuccessful. A representative of Church of Scientology would call the activists internet terrorists, and Anonymous would respond by incorporating 'free hugs' activism into protests. Church of Scientology would call Anonymous stupid teenagers, and activists headed to Washington to attempt to get the issue on the political agenda. The diversity was what gave the whole movement strength.

The common goal for the Obama campaign was obvious and clear-cut – to have Barack Obama elected. This single, basic goal united people from all different backgrounds and caused them to work together.

Similarly, for the Christmas Charts Campaign the single goal was to make sure the X-factor winner would not get the number 1 position. This united Rage Against the Machine fans, alternative and counter-culture supporters, and many people who might not have cared for Rage Against the Machine music – for them which single won was secondary to making sure that the X-factor winner did not get the number 1 position.

8.1 A high percentage of user generated content

It is intrinsic to a self-activating, self-organising movement that a lot of the material and content will be created or processed by the participants. If people dedicate time to take action in precisely the manner they deem is best, then it is often a natural step for those people to create tailor-made material such as flyers, posters, websites and other ways to spread information to their exact needs.

In the case of the Obama campaign, there was a lot of material provided by the official campaign – images, statistics and other information sources – and these could be used or adapted for use, as well as completely new material created or compiled by activists to fit their exact needs.

In the presidential campaign, a lot of the self-activating, self-organising activism happened on a very small scale. An Obama supporter would decide that the official campaign wasn't addressing an issue they saw in their surroundings, and mount a personal campaign to remedy that. Official campaign material could be compiled and customised for the specific issue or situation the activists wished to address.

In the Anonymous vs. Scientology movement, content compilation and writing was a constant and communal process – information dissemination was one of the cornerstones of the movement, and transparent, easily readable information a must. Small teams of people worked together to distill the huge source documents into something that was easily read and used by other activists. It was customary for activists who had written or created material like posters, images, protest signs and flyers to post both the printable finished result and the source materials and images so that others could use, adapt for their own needs, and spread.

This sharing of work and resources, essentially without ego – since everybody was anonymous, the credit for any work went to the entity Anonymous – truly embodies the

spirit of open source activism. The collective worked, shared, exchanged, and put its effort toward creating for the common benefit.

8.J Media interest in the movement

Another common factor between the movements was the attention from traditional media. All three movements were given a substantial amount of coverage in newspapers both paper and digital, and television news.

Part of this interest can be attributed to the subject, especially in the case of the Obama campaign. It was also a human interest angle for many journalists, source for an interesting story about what people just like their readers could achieve when organised.

The third way these movements were represented in the news was often published in technical columns. It spoke with a degree of wonder about what 'young people' – those were mostly who the media saw – were getting up to on the internet. The movements and their fascinating open source natures were covered as cutting-edge developments.

8.K Tangible results

If there is no leader or central organisation to motivate activists to continue their efforts, the motivation must come from the process itself; and from seeing efforts rewarded in some way.

In the Obama presidential campaign, there were a lot of concrete feedback loops – poll results being chief among them, but also direct and local feedback to the activists, such as what sort of reaction they would get to their efforts, the amount of T-shirts, bumper stickers and buttons seen on the street, and yard signs seen in the neighbourhood. Because most of the initiatives were local, it was possible to have a close feel for what effect the activism efforts were having, which worked as a good motivator for activists.

The Anonymous vs. Scientology movement was much more complex in this aspect – though the original credo had been to bring down the Scientology organisation, every

activist had their own motivation, and many were privately more realistic in what they wished to accomplish – for instance to inform as many people as possible about the abuses within the Church of Scientology. Because the public attention for the cause increased as the movement developed, there was the reward of the increasing attention. There developed a climate in the media and among ex-Scientologists of it being safe to be critical of Scientology without much fear of the aggressive litigation that the Church of Scientology is known for – as there simply were too many critical voices to pursue. Seeing such trends develop in society felt as a reward for the activists, and reinforced the belief that the effort was worthwhile.

Results in the Christmas Charts Campaign were easy to measure – there were regular updates in how many singles had been sold, and how many the direct competition had sold. Seeing how close the two came was a major motivating factor.

8.L An element of fun

As has been mentioned earlier in the chapter about the Anonymous vs. Scientology movement, no leaderless collective of activists could expect people to turn up time after time, and gain new people, if the activities weren't enjoyable in some way. For the Anonymous vs Scientology movement this had the added benefit of recruiting – its masked street party style protests were sometimes so enjoyable that it wasn't uncommon for new people to join because they agreed with the cause and liked the atmosphere, and to not get deeper involved with the cause until later on.

Another advantage of the fun atmosphere was to make the protestors less threatening to the public. A group of mostly young people with masks was made a lot less threatening if they were eating cake and dancing to Rick Astley. It made the claims of the opposition that the Anonymous activists were terrorists seem even more overdrawn

Though it was less overt, the Obama presidential campaign provided a lot of space for entertaining, upbeat activities and activism, such as benefit concerts and fundraising efforts. There was also a palpable excitement among the participants, a hopefulness that the underdog of 8 years conservatism could really have a chance to win this time.

The Christmas charts campaign tapped into the entertainment factor also; long before participants knew they had a serious chance of succeeding, the idea of 'Making Simon Cowell twitch' provided entertainment and motivation.

In this chapter we have looked at the similarities between the three cases. In chapter 9, we will examine the differences between them.

Chapter 9: Where do the cases differ?

Properties	Anonymous	Obama grassroots campaign	Christmas Charts campaign
1 Is the movement local / regional / national / global?	Global movement, with global, national, regional and local initiatives.	National movement, with local initiatives	National movement, with international support
2 Style of self-organisation according to Ginneken's animal models	Ant-Bee with elements of Bird - Fish	Bird-Fish model	Sheep-Cattle model with elements of Virus-bacteria
3 Internal decision-making process	Individuals take initiatives. Others adopt (in different locations) or reject. Feedback loops form.	Individuals take small, local initiatives. Others do or not join to support.	Individuals propose an action. Others do or do not join the action.
4 What sort of communication means are used internally?	Message boards, Internet Relay Chat, wiki-style sites	mybarackobama.com	Facebook.com
5 What sort of communication means are used externally?	Protest, signs, flyers, press releases, comments on internet articles, conversations, YouTube videos, websites, stickers and cards	Flyers, personal conversations (canvassing), signs, bumper stickers, word of mouth	Facebook.com and media interviews
6 Ability of external parties to influence the movement	Very limited, and success depends on many factors, but possible: example is Mark 'Wise Beard Man' Bunker.	Large; especially influence from the official campaign weighed heavily	Very limited
7 Classification of participants according to the Motivation model.	A mix of Post-materialists and Postmodern Hedonists	a mix of Cosmopolitans, Post-materialists and Social Climbers	A mix of Post-materialists and Postmodern Hedonists
8 Identity/ Anonymity	Personal identity is discarded; all become part of the super identity that is called Anonymous. Credit for work is not personal. Use of names is discouraged. The movement is strongly averse of any sign of personal importance in its participants.	personal identity is maintained, there is pride in participation.	Personal identity is maintained, there is pride in participation.

Figure 4 - diagram of the differences in the three movements

This chapter expands on figure 4, which outlines the differences between the three movements. As we have seen there are significant similarities in how the movements functioned, but they are by no means the same.

We can typify Anonymous as one global, self-organising movement. While there were local subgroups, many themes, ideas and initiatives were shared with all participants via the global messageboard.

The Obama campaign on the other hand consisted of multiple self organising initiatives that worked toward the same goal, and in existence alongside to, and in harmony with, the official presidential campaign.

The Christmas Charts Campaign was something else again; a short-track viral movement, heavy on promotion but low on self-organisation. Because so little was required to participate, this movement looked significantly different than the other two cases.

Expanding on figure 4:

1) Is the movement local / regional / national / global?

Here we are looking at the spread of the movement, and how it was organised.

Anonymous is a global movement with initiatives being organised at every level; from a postcard campaign that spanned across the world, to national actions, to regional and local.

The Obama grassroots movement was national in the sense that it spanned America, but the vast majority of the activism was regional and local. This can be attributed to the way the grassroots initiatives existed next to the official campaign – the official campaign already covered the broad and general national and regional message. The grassroots activism existed mostly in the gaps left by the official campaign, and was therefore an excellent addition, such as in the following example:

...the campaign also seems to recognize that some volunteers won't cotton to a top-down system, and its web tools accommodate independent efforts. Ms. Scanlon started her work for Obama with the South Tampa team, but felt the campaign wasn't sending enough volunteers to canvas her hometown Plant City, a working-class suburb that voted for Bush in the last two presidential elections.

*Obama's organizers insisted that that they needed to focus their efforts on more densely populated surrounding areas.
"I just didn't feel good about that," she says.
So Scanlon took matters in her own hands by tapping into the campaign's online Neighbor-to-Neighbor tool on myBo. In two days last September, she knocked on 50 doors to sniff out support for Obama, entering her neighbors' responses into the campaign's databases through myBo...*

Wired.com - Obama's Secret Weapons [10]

The *Christmas Charts Campaign* was a national campaign, though through the chosen medium of internet and Facebook, it got global attention; many of the campaign's supporters could not contribute themselves because they were not in the united Kingdom.

2) Style of self-organisation according to Ginneken's animal models

Anonymous:

Following Ginneken's animal models, the unique hive-style organisation of the Anonymous movement most closely resembles the Ant-Bee model, with no or only brief, circumstantial leadership, constant initiatives from individuals, strong and numerous feedback loops, and centrally stored and shared knowledge and experience.

The movement also had elements of the Bird-Fish model, mainly the advanced level of synchronicity between participants; through this level of synergy, the movement could be perceived to have 'moods' – at times Anonymous was cheerful, excited, indignant or angry.

Obama campaign:

Following Ginneken's animal models, a campaign of many independent elements that pursue the same goal and react similar to outside influence most resembles the Bird Fish model.

Christmas Charts Campaign:

Following Ginneken's animal models, a campaign in which many individuals follow the initiative of a few most closely resembles the Sheep-Cattle model. However the way in which news about the campaign spread rapidly and exponentially also has elements of the Virus-Bacteria model.

3) Internal decision-making process

Anonymous: Individuals take initiatives. Others adopt (in different locations) or reject. Feedback loops form.

Obama grassroots: Individuals take small, local initiatives. Others do or not join to support. Feedback loops form.

Christmas Charts Campaign: Individuals propose an action. Others do or do not join the action. Because it is not truly an ongoing process, there are few to none feedback loops.

4) What sort of communication means are used internally?

Anonymous: Message boards, Internet Relay Chat, wiki-style sites

All these means are geared toward facilitating direct, personal involvement - without having to wait for someone else to update websites, for instance, and toward anonymity.

Obama grassroots: mybarackobama.com, social networking sites, email, in-person meetings.

All these means are geared toward empowered, open communication.

Christmas Charts Campaign: Facebook.com

This means of communication fit with the extremely short-focus style of campaign

5) What sort of communication means are used externally?

Anonymous: Protest, signs, flyers, press releases, comments on internet articles, websites, personal conversations, youtube videos, websites, stickers and cards

Obama grassroots: Flyers, personal conversations (canvassing) in person and on the phone, signs, bumper stickers, word of mouth, text messages, websites, email

Christmas Charts Campaign: Facebook.com, websites, word of mouth and media interviews

6) Influence from the outside

Anonymous: That it was possible to influence Anonymous from the outside became clear when Mark Bunker, long standing critic of Scientology, posted a video on YouTube that addressed Anonymous and the tactics it used at that moment. In a calm, fatherly manner, Bunker explained that he was very happy to see more people aware of the injustices within Scientology, but also concerned about the style that Anonymous was using at that point. He explained that he was worried that the tactics would form a danger to the activists themselves, and also to the existing activism against Scientology. He gave background on how serious the opposition was, and requested that Anonymous activists refined their tactics and stick within legal bounds.

No one person since has had such a profound effect on the movement; Anonymous adopted Mark Bunker and he became known as Wise Beard Man. It is important to understand that Mr Bunker at no point tried to lead Anonymous – he appeared to understand from the beginning that it was both impossible and unwanted, and it is very likely that the movement would have turned against him, had he tried . Rather he made suggestions, provided information, introduced other long time activists and provided feedback on the effectiveness of tactics via his sources. Some within the movement resisted his influence and he was by no means universally accepted, but his experience as an activist and knowledge about Scientology was welcomed, just as each participant shared their relevant knowledge and skills, and his voice carried some weight to most participants.

If we are looking at influence from the outside, it is interesting to note that as soon as Mark Bunker got response to his initial video, he was no longer outside the movement – he became part of it, if not literally part of Anonymous (he did, after all, have his name out in the open). He became the most well-known of the allied activists, and later attended protests and played a role in introducing many ex-scientologists to Anonymous, who in turn provided vital information and inspiration to the movement.

It was possible to influence the movement in many ways; however in general the effect of such attempts were completely unpredictable. Others tried what Mark Bunker did, and were ignored, rejected, or saw things take a turn into the opposite direction of

what they'd intended. A meme within the movement was 'Anonymous is not your personal army' and it is likely that this created a healthy amount of scepticism about any one person who tried to influence the movement or its agenda.

Anonymous as a movement could be relied on to change, develop and react constantly to outside influence; however the form of that change and reaction was impossible to predict or to steer.

Obama Grassroots: because this was not one large movement but rather many small initiatives taken for the same purpose, it is difficult to speak about a generalised movement that could or could not be influenced. However because the ultimate goal of all activism was to get Barack Obama elected, the word of official campaign people carried a lot of weight. If a grassroots initiative was going in a direction that the official campaign planning considered counterproductive, then contacting the activists and asking for change was extremely likely to be honoured.

Storming the Charts: as mentioned in chapter 3c, this campaign was so short track that there was really not much to influence about it; only the intensity of spreading the word about it could vary.

7) Classification of participants according to the Motivaction model.

In looking at open source activism, we are looking at movements and therefore people that are self-selecting. Nobody aims a movement at a certain subgroup of the population, because there is nobody at the wheel to aim it, people decide for themselves if the movement is something they are interested in.

It is therefore impossible to speak of a 'target group' in the context of open source activism. There is nobody to set the target.

It is however interesting to look at which people feel attracted to a certain movement, and what they share in terms of values and attitudes.

Both Anonymous and the Christmas Charts Campaign involved either activism forms (Anonymous) or a subject (Christmas chart campaign) that appeal to non-conformists and innovators. Young people make up a large part of those groups, and young people consequently made up a large part of these movements.

The Obama campaign was much more mainstream and socially acceptable, and it is not surprising to see that a much wider range of mentalities are found in that movement.

Cosmopolitans

The open-minded and critical world citizens that develop postmodern values such as personal development and experiencing, and integrate those with modern values such as social success, materialism and enjoying life.

Social Climbers

The career oriented individualist with a definite fascination for social status, new technology, risk and excitement.

Post-materialists

Idealistic and critical of society, these people want to develop themselves, take a stand against injustice in society, and want to preserve the environment.

Postmodern Hedonists

The pioneers of the culture of experience, in which experimenting and breaking with moral and social conventions have become goals of their own.

Translated from www.motivaction.nl [3]

According to the Motivaction mentality model, the movements consisted of people we can classify as fitting in these subgroups:

Anonymous: A mix of Post-materialists and Postmodern Hedonists

Obama Grassroots: a mix of Cosmopolitans, Post-materialists and Social Climbers

Christmas Charts Campaign: A mix of Post-materialists and Postmodern Hedonists

8) Identity/ Anonymity

Anonymous: Personal identity is discarded; all become part of the super identity that is called Anonymous. Credit for work is not personal. Use of names is discouraged. The movement is strongly anti any sign of personal importance in its participants.

Obama Grassroots: Personal identity is maintained, and not protected; most activists were happy to have their name attached to their efforts.

Storming the Charts: Personal identity is maintained, but many participants operate under a synonym.

Chapter 10 Conclusion

In the previous chapters we have examined three instances of open source activism. We looked at what the movements have in common, and what the participants have in common. Then we looked at what the differences between the movements are.

It is now possible answer the following questions:

- What are the crucial factors that make open source activism happen?
- Can those five circumstances be created?
- If open source activism can be created, is this actually desirable?
- In which situations is open source activism in its original form applicable?
- How could open source activism be adapted to make it more useful to communicators, or, which elements of open source activism can be adopted by communicators?
- How could open source activism be a danger to organisations?

And finally the research question:

What is open source activism, and how could it be useful to communicators?

10.A What are the crucial factors that make open source activism happen?

In this paragraph we will describe purely what happened in the three cases we have examined. It is an observational analysis of which factors came together to let open source activism happen.

The right audience...

If an initiative does not find the right people, people who are interested, willing and able to invest themselves into it and put energy into a campaign, it will not succeed.

With the right frame of reference

The audience must also have the right frame of reference; often a certain amount of prior knowledge, awareness of the subject matter. In the Anonymous movement, many participants shared that they had previously become interested in and appalled

by scientology and its methods, but had not done anything with that indignation at the time because they were alone. When they heard about Anonymous activism, they took this chance to act upon their convictions.

In the right mood...

This is an area that is extremely hard to determine, but it is clear that in the cases where open source activism took place, there was a degree of a common mood among the participants, especially at the start. If there is a common mood that is not conducive to the subject of the activism – like for instance just before major holidays – then this would inhibit the chance of open source activism happening.

at the right moment...

Timing is very important. An otherwise perfect set of circumstances could fail easily if it came at a moment where the audience is not receptive. For instance, if the audience would have been students, the end of the academic year is a bad moment. Just after a large natural disaster, in August or at Christmas could have similar timing issues.

With the right spark.

The right spark is something that utilises the previous four factors and ignites the potential they create. The right spark inspires people to unite and to take action. The spark can be a media article or a speech, but is most often an event or a series of events.

The individual factors mentioned above often occur spontaneously in society, but only if all 5 coincide then open source activism will occur. It is highly likely that thousands, if not millions, moments occur that two or more of these circumstances coincide, but it is rare for all five to happen.

This is illustrated in a Venn diagram (figure 5)

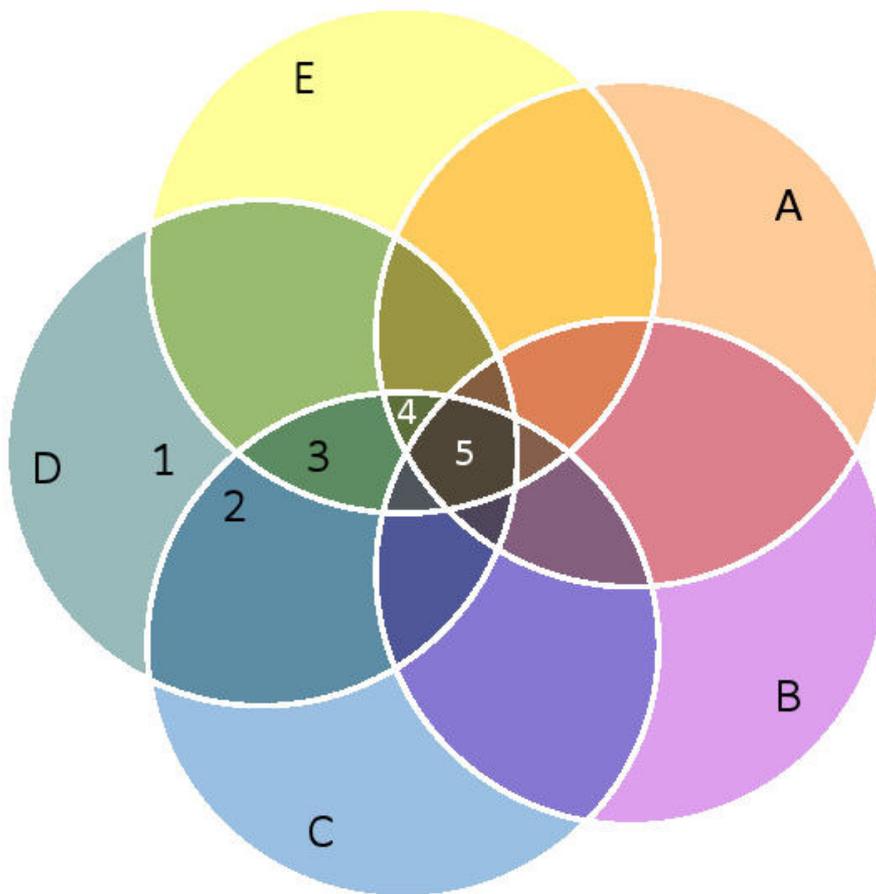


Figure 5; Venn diagram of coinciding circumstances

A: audience, B: frame of reference, C: mood, D: moment, E: spark

1: An isolated circumstance, 2: two coinciding circumstances, 3: three coinciding circumstances, 4: four coinciding circumstances, 5: all the required factors are present and open source activism could now take place.

The earlier chapters have explained what open source activism is, and illustrated what it can achieve. In certain circumstances it can cause powerful activism with far reaching consequences. Participants in open source activism campaigns are often strongly motivated to take action and there is great willingness to take initiative. Because open source activism campaigns are generally decentralised and non-hierarchical, they tend to have many feedback loops, and a short response time. If an outside circumstance changes, each participant is able to react to this immediately in the way they see fit. This gives the movement flexibility and diversity.

It is easy to see why open source activism is interesting for communication professionals; to be able to harness such a powerful process for the goals of their organisation would have incredible impact.

Viral marketing, when it succeeds, is a powerful tool to rapidly and exponentially spread a message. Open source activism would seem to be a method that could rapidly and exponentially inspire people to not just be aware of something, but to invest energy and undertake action.

10.B Can those five circumstances be created?

You can create circumstances, but as the definition of what is the *right* circumstance is decided by the effect it has – if open source activism does not result from it then it was not the right circumstance or set of circumstances – it would be extremely complicated to engineer a situation from which open source activism could arise

10.C If open source activism can be created, is this actually desirable?

A separate but related question – even if you *could*, *should* you create open source activism? The answers are diverse, because they depend upon which example you look at.

Looking at the complex, idealistic and spontaneous nature of the Anonymous campaign, it is hard to imagine creating or causing a campaign like that without bordering on ethical issues. The participants acted because it was their own initiative for an issue that mattered to them – it is unlikely they would have acted to the extent that they did if they knew it was for a company or organisation. If a communication professional somehow succeeded in setting up such a situation for their organisation while hiding that it was in fact for an organisation, that would be both (borderline'?) unethical and extremely risky. Experience teaches us that few things stay secret forever, and if it became known to the activists that they were manipulated into action, the backlash could be significant. It is not unthinkable that the entire focus, creativity and energy of the movement would refocus on lashing out against the manipulators.

However, in case of a campaign such as the grassroots initiatives around the Obama presidential campaign it can be argued that Barack Obama provided the spark, the fifth element in a situation that was already suffused with four factors:

- The right audience: democratic-leaning Americans
- The right frame of reference: a degree of knowledge, involvement and willingness to act within these people
- The right mood: frustration with 8 years of government that had taken the country in a direction they did not agree with, and hope that the election might change that
- The right moment: as this was a long-running situation, in this case the right moment was simply the run-up for the elections

The right spark: Mr Obama's message of hope and change touched many people, and his encouragement and facilitating of private initiatives appears to have been an inspiration for many. His speeches made the spark that turned a generalised feeling of dissatisfaction into an active desire to contribute.

"As the shouting becomes almost too loud to bear, he ads the five words that capsulize the whole message and send the voters scrambling back into their winter coats and streaming out the door: 'Let's go change the world'. [...] there is a jolt of pure electric energy at those closing words."

David Broder - The Spokesman-Review [21]

Instead of just watching and applauding from the side lines, his message inspired people to get involved, not just in a structured volunteer fashion but also to initiate what they felt necessary. In essence Mr Obama's goal became so intensely personal for many people that they were doing this for themselves, not for him, and put effort into their initiatives accordingly.

The example above illustrates that while open source activism cannot be *created*, it is possible to observe situations where three or four of the factors already coincide, and in some situations a well-placed spark can then *inspire* open source activism.

In the event that this succeeds, it is important for the organisation to resist the urge to *manage* the activism; participants are not employees. They are undertaking action not for the organisation, but for themselves – only the goals coincide. However, acknowledging, facilitating and encouraging can give campaigns great impulse.

10.D In which situations is open source activism in its original form applicable?

Without supplying external motivation, open source activism is most likely restricted to situations where people are already motivated enough about a subject to undertake action. Such motivation is generally found when action either benefits the people directly, or benefits some goal that they deem worthy.

This means that it is not common for such motivation to exist where it benefits a for-profit organisation. It is unlikely that many people will be prepared to invest time, effort and energy into furthering a goal that they perceive to benefit a company's profit margins.

This means that as it is, open source activism is mainly interesting for non-profit organisations which may concentrate on an issue a certain amount of people care about.

Situations where open source activism could be used would need to have goals that can be achieved in a wide range of approaches; spreading awareness is probably the best example of this. More complicated goals will require more specific approaches, which is where proportionally more of the effort in an open source activism campaign will be wasted. This is ineffective and likely also demotivating for activists.

An additional necessity is for the situation to be 'robust'; in that if the activism should turn into directions that were not intended or foreseen, the cause would not easily be damaged. If the subject matter is very sensitive, far more control is needed in the campaign than would be possible to have with open source activism. The strength of this type of movement is diversity, flexibility and creativity; it is shooting at a target with birdshot. Some of the projectiles will miss completely, but some will hit the target in various places. If a subject matter requires a precisely applied bullet, open source activism is not the right means to attain the goal.

10.E How could open source activism be adapted to make it more useful to communicators, or, which elements of open source activism can be adopted by communicators?

As we have seen, as it is, open source activism is a largely spontaneous process that is difficult to predict and close to impossible to create. However, there are elements within the activism that could be of use to communicators. Especially the self-organising aspect is something that can provide a powerful impulse to any activities the public undertake.

Example: an organisation calls people to do something of their own design to further a predefined goal.

Advantage: it utilised some of the major advantages of open source activism, such as diversity and creativity, while still retaining a modicum of control over the goals and the techniques used.

Disadvantage: the organisation will have to supply external motivation; an easy way would be to turn it into a contest with a prize for the most efficient effort. A further advantage could be that because there is an organisation behind the setup, fewer people will act, and with weaker motivation than if it were a self-initiating movement. Each of the open source activism movements we have examined have in common that activists felt that if they did not take the actions they did, nobody else would – this was a strong motivator. If participants felt that somebody else (like the organisation) would pick up the slack if they abandoned their efforts, it is likely that their commitment to the activism would be less.

10.E.1 Co-creation

The idea that something like open source activism could be useful to organisations fits with the growing trend of consumer empowerment and co-creation. The old model is that organisations are the active party - they research what consumers want and then develop it for them, and consumers passively consume the product.

The downsides of this model are significant and what companies have struggled with for a long time; research is limited. Focus groups can never be representative for each individual consumer. In addition, the more experienced a researcher or developer becomes in their subject, the further they are removed from the way in which a consumer relates to the product. This is a problem especially prevalent in industries that develop products for children and adolescents.

This entire product development model has a tendency to lead to a degree of arrogance within companies; to a tendency to tell consumers what it is they need.

This is changing, and many organisations are moving toward a view where they actively encourage and invite consumers to share their views and ideas on what a product should be. A good example of this is LEGO.

"...dozens of Web sites were hosting third-party programs that helped Mindstorms users build robots that Lego had never dreamed of: soda machines, blackjack dealers, even toilet scrubbers. Hardware mavens designed sensors that were far more sophisticated than the touch and light sensors included in the factory kit. More than 40 Mindstorms guidebooks provided step-by-step strategies for tweaking performance out of the kit's 727 parts."

Wired.com - Geeks in Toyland [22]

LEGO reduced its traditional market research efforts of after-market or after-design focus groups and questionnaires, and instead opened its eyes to what users were doing with their product. Instead of sending cease and desist letters, the company saw the value in what it found – unique insight into what users really wanted.

Inspired by the creativity and resourcefulness of the users, LEGO approached four expert users and worked with them extensively to design the new version of Mindstorms, to great success. Since then, they have expanded this user panel with ten more people, and later with 100 again. 10 000 LEGO enthusiasts applied for these hundred test panel positions. [23]

To fully explore the subject of co-creation would be outside the scope of this dissertation. However we can conclude that in the future, co-creation, crowdsourcing and other forms of outside innovation are likely to become more commonplace, and attitudes about the roles of organisations versus roles of users will continue to change.

Relinquishing control is only a problem from the point of view of traditional us-to-you communication and business styles. When businesses grow more comfortable with the idea of inviting the public into their design, development and other business processes, the need to control every aspect diminishes, and there is much to gain. An organisation used to and interested in processes like co-creation and crowdsourcing would be able to respond better to open source activism; whether the

activism moves toward similar goals, or it turns against the organisation. What may seem like a dangerous lack of control now, is likely to pose much less of a problem in the future.

10.F How could open source activism be a danger to organisations?

In this dissertation we have looked at how open source activism happens and how it could be an advantage to communicators. All the questions asked and answered in this chapter are from the point of view as the organisation as the active entity – how can the organisation use this phenomenon. The risks we have discussed have focussed on the risks of not succeeding; they are mostly connected to the inherent lack of control possible over such a campaign. Most of those risks cannot be avoided, but can be minimised by carefully choosing subject matter, and not attempting to apply open source activism techniques to subject matters that are not suitable.

The angle we have ignored until now is what happens if an organisation finds itself the *subject* of open source activism; like the Church of Scientology suddenly found itself subject of Anonymous activism.

It is clear that such activism poses a great danger to organisations. The exact same factors that make it a formidable movement for the issue it's working *for*, make it a formidable threat to the issue or organisation it is working *against*.

Is it possible to 'disarm' an open source movement once it is in full flight? What is the best way to react for an organisation that has become the subject of an open source campaign? Is it possible to do damage control? To fully explore this subject would enter the territory of crisis management, which is outside the scope of this dissertation.

However based on the analysis of the movements, it can be concluded that a better approach would be to be on the lookout for situations where two or more of the five factors coincide; for most organisations these situations would arise within their circle of stakeholders. If there are coincidences of three or four factors, these can be considered dormant until something occurs that can suddenly and rapidly turn them into active open source movements. It would therefore be prudent for organisations to

keep careful lookout for the signs of a situation waiting for its time or spark, and take steps to defuse them. Defusing could take the form of engaging the relevant public in conversation or resolving the issue the budding campaign centres on. If an organisation can approach these situations with an attitude of collaboration rather than contention, it is much more likely that both the movement will be defused, and that it will be able to maintain a positive image to the public.

10.G Answering the research question:

What is open source activism, and how could it be useful to communicators?

Open source activism is a self activating, self organising style of activism that crosses the boundary from the digital to the physical world. It can be completely independent of any existing organisation, like Anonymous, or it can come into existence to further the same goals as an existing entity, like the Obama grassroots campaign. It can be a complex and diverse movement like Anonymous, or it can be a short-track, single issue movement like the Christmas Charts campaign. It could be a local campaign about a local issue, or it could be an international movement.

The success of the Obama presidential campaign proves just how useful open source activism can be to communicators; the open source initiatives were a powerful addition to the official campaign and it is likely that those initiatives made a significant difference to the end result.

However open source activism is not something that an organisation can 'do' or 'have'. The factors required for it to exist are factors that occur naturally in society, and when they coincide, open source activism may occur. In some situations it may be possible to encourage such a coinciding situation. The problem remains that it is almost impossible to know if a factor that is created or encouraged is the *right* factor until activism either came into existence, or did not do so.

Alike viral campaigns, the success or failure of an open source activism campaign is decided by if it reaches the right people at the right moment with the right stimulus. While this seems simple in theory, a matter of thorough research into who the right people are and what consists of the right moment and stimulus, there is a knowledge gap in our understanding of the process. Exactly how it happens that one campaign takes flight and goes global while another, to our eyes equally well designed, fizzles out, is hard to explain. In the end it may come down to details as fine as who the first few people who are exposed to the message are, what their mood is at that moment. It is possible that a situation that has every hallmark of impending open source activism misses a crucial component and does not take off, and also that a less likely looking situation reaches the right people in the right way and takes flight despite its perceived weaknesses. The crucial factor is the human factor, and what individual people add to the process is almost impossible to predict.

In conclusion, while there may be use for open source activism, in our present state of knowledge the phenomenon has limited possibility for practical application as a tool in organisations. Only in situations where a number of the prerequisites are already present is it a realistic to base a strategy on an open source campaign.

However, as society in general and organisations in specific go toward a state where co-creation is ever more common, it is likely that this will change in the future. It is therefore useful for communicators to be educated about the phenomenon and understand its possibilities and limitations. This will also enable communicators to anticipate and react to emerging open source activism with flexibility and poise, whether it is working toward the goals of the organisation or against them.

Chapter 11: Recommendations

11.A Recommendations for communicators:

Hundreds of people who align themselves with your goal, who in teams or as individuals devise their own approach to further your goals and then execute those approaches, all with little to no input from you. People who invest time, effort and money into furthering your goals, and expect little to nothing in return. Hundreds of mini-campaigns, lead by motivated opinion leaders and reaching people who would otherwise never have heard the message, and who are more likely to accept the message from that source.

Sounds good?

Hundreds of people who align themselves with their interpretation of your goal, or what they think your goal should be, who in teams or as individuals devise their own approach to further those goals and then may or may not execute those approaches, all without much chance for you to influence them. People who invest time, effort and money into furthering their goals, which as this stage may or may not still be the same as your goals, and expect or want no input from you. Hundreds of mini-campaigns, lead by motivated opinion leaders and reaching people who would otherwise never have heard the message, and who are more likely to accept the message from that source.

Not only could both these scenarios be true, they could both be true *at the same moment*. Whether such a campaign turns into a dream or a nightmare is largely dependent on the subject matter and the attitude and expectations of the communicators involved.

Communicators should consider open source activism as an option only if the distinctive characteristics of such activism would be an asset in the specific situation. If the prospect of hundreds of people each devising their own approach to the situation and executing to their own standards strikes fear in the heart of the communicators, open source activism is not the right option. While it may be possible to influence the activism to some degree, open source activism gets its power from the responsibility that the activists take on, and the freedom that comes with it.

Whether coming into contact with open source activism in an active or a passive manner, it is important for communicators to understand the intrinsic properties of such a movement, and what sort of influence their own actions could have on it, both positive and negative.

It is worth restating that activists come from within the field of stakeholders; a policy of closely monitoring stakeholders should give an organisation early notice of potential and emerging activism. How the organisation then reacts is crucial.

When the activism turns against the organisation:

It should never be forgotten that activists undertake action because they have concerns or dissatisfaction with a situation, and that even if their action opposes the organisation, it is not an attack.

Even in the Anonymous movement, where some activists freely defined their actions as a frontal attack, actions were driven by a concern about the abuse within the Church of Scientology and dissatisfaction with the conduct of the organisation. If the Church of Scientology had resisted the siege mentality its internal culture predisposed it to adopt, and instead addressed the concerns, it is likely that the events would have played out radically different. Hindsight teaches us that in this case, the attack and counter attack approach the organisation adopted only served to fuel the activism.

11.B Recommendations for further research:

Further research is mainly required into the details of how open source activism comes into existence. We have determined that the five factors (audience, frame of reference, mood, moment and spark) are each required to allow activism to happen, but exactly what makes a factor the right one is still an unknown.

That lack of knowledge is the main inhibitor in being able to use open source activism as a communication tool. Knowing exactly what determines if something is the right factor would open the way toward designing factors and creating situations from which open source activism could stem.

Further research should also be done into the ways in which open source activism is open to influence from outside; in what ways organisations can influence the course of the activism, both when it is working toward the same goals as the organisation and when it is working against the organisation.

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