

# Lobbying and Advocacy Essentials

# 1. Building a lobbying / Advocacy strategy– key principles



# What are Employers' and Business Membership Organization?

- + A membership based organisation set up to promote and advance the interests of employers (a person or organization that employs people)
- + Must be independent and apolitical



# Who can be a member?

+ **Membership must be:**

+ **Voluntary**

+ **Open to all private companies (and/or sectoral or territorial business associations)**

The background is a complex, abstract pattern of overlapping, colorful lines (yellow, green, blue, red) forming various geometric shapes like squares and rectangles. The lines are interconnected at points, creating a mesh-like structure. The colors are vibrant and contrast against a dark blue background. There are also some white dashed lines and a white semi-circle in the top left corner, and another white semi-circle in the bottom right corner.

**Which are roles  
and functions of EBMOs?**





# Main Objective

+ Advocate for a **business environment conducive to enterprise creation and development**, generating employment and contributing to socio-economic development of the country



# What do EBMOs do?

1. Represent business interest
2. Provide services to members

Cross-cutting roles :  
Industrial relations, Skills  
Training

# The main role of EBMOs



1

## Represent business interests and concerns

Helping to build a policy environment and public license to operate which contributes to business success and national prosperity

- This costs the EBMO

2

## Provide services to members

Building better businesses through training, information and upskilling

- This makes money for the EBMO

The role of EBMOs is to advocate on behalf of *all* businesses:

- ☒ Collective action through EBMOs in representation of the business community
- ☒ EBMOs are NOT specialized commercial lobbyists & should NOT exercise any direct representation



# The goal of EBMOs



All EBMO advocacy and lobbying efforts should contribute towards a general goal:

**Improving the business environment**

# What is the business environment?



- The business environment is the set of factors shaping the opportunities and incentives for firms to invest, create jobs, expand and grow
- It involves a complex set of policy, legal, institutional and social conditions that govern and affect business activities
- It is shaped by international, national, regional and local factors
- It involves laws, regulations, institutions and social norms and beliefs



WORLD BANK GROUP



**How  
To Do  
It?**

# Advocacy and Lobbying



# What does Lobbying and advocacy mean?

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- Advocacy and lobbying are two key strategies used to influence decision-making in public policy.
- Advocacy: Raising awareness, educating, and shaping public perception on issues.
- Lobbying: Direct engagement with government officials to influence legislation, regulations, policies.
- Employers' organizations play a crucial role in representing private sector interests in public policy.
- A combination of advocacy and lobbying is often the most effective approach to long-term policy change.



	Advocacy	Lobbying
Target	Raise awareness, educate or change perceptions about an issue	Influence government decisions or draft legislation
Mechanisms	Communication campaigns, discussion forums, media debate	Direct contact with decision makers and delivery of data and arguments
Target actors	Policymakers, society at large, stakeholder groups (youth, women, unemployed)	Legislators, policymakers and state officials

# What are the most common challenges to lobby?

1. Financial Constraints: High costs of lobbying campaigns and resource limitations.
2. Political Barriers: Resistance from policymakers, bureaucratic delays, and political instability.
3. Legal and Regulatory Issues: Complex lobbying laws and compliance requirements.

# What are the most common challenges to lobby?

- 4. Public Perception & Disinformation: Negative portrayals of lobbying efforts and misinformation campaigns.
- 5. Coordination Issues: Aligning diverse stakeholders with different priorities.



# Potential advocacy lobbying topics



- Ease of doing business
- Labour markets
- Infrastructure
- Education and Training
- Sustainability and climate change
- Trade and exports
- Productivity
- Tax

# Advocacy and Lobbying without a plan?



# How to fix policy priorities

- Members views first
- EBMOs leaders as front runners – anticipating needs and issues

“Pick Battles Big Enough To Matter, But Small Enough To Win”.

# Advocacy is an organizational effort



Members needs – channeled through the Board or committees or directly by members

Senior Management

Research  
Institute / Team

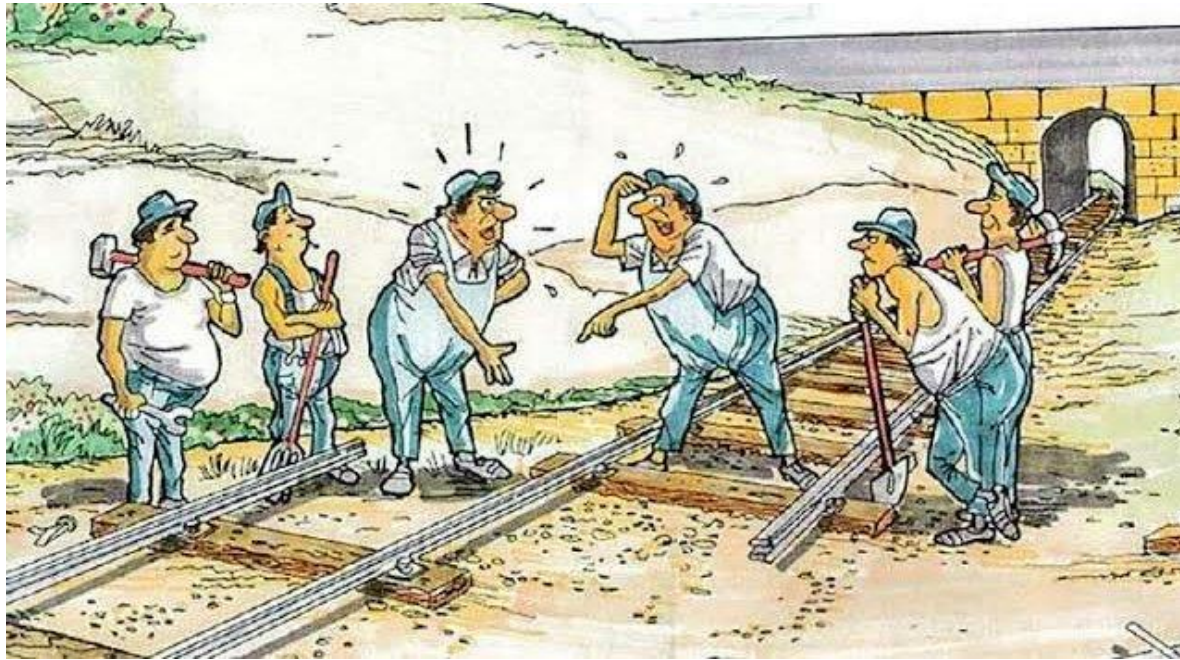
Membership  
Unit

Communication  
/ PR /  
Marketing Unit

Policy strategy /  
Advocacy Team



# No internal coordination = no results



# It is not about you



## Some common mistakes made in lobbying and advocacy

- Misuse of arguments and evidence
- Putting business at the center
- Not emphasizing the link between business success and community success
- Using business language
- Using business deadlines
- Insufficient consultation with others
- Arrogance
- Exaggerating that everything is an emergency and being aggressive in your message delivery
- Embarrassing your target or other stakeholders
- Thinking it is all going to happen immediately
- Thinking that you are correct
- Misunderstanding what needs to be done to help you even if others agree to do so
- Not focusing on political and public policy contacts until you need them

# Even a great research can lead to no result



## Common issues / mistakes

- No members buy in
- Great analysis, but **no solutions**
- No analysis of possibilities of success
- Weak support from external stakeholders
- No “translation” of a good research into a policy paper
- No proper communication with internal stakeholders
- Lack of a strategy to engage with media

'DON'T BRING PROBLEMS,  
BRING SOLUTIONS'...



PROBLEM

VS



SOLUTION

...DOESN'T WORK!



# Reactive or Proactive Lobbying



## 3. Steps for a Lobbying Strategy

# What are the steps to develop a coherent strategy?



## Key Steps:

1. Determine the objective of the lobbying campaign (success)
2. Stakeholders mapping (policy making process)
3. Evaluate our organization capacity regarding the execution of the campaign
4. Develop and implement the lobbying and advocacy Plan (research, policy papers, key messages, channels)
5. Monitor progress and evaluate results

# Step 1 - Determine the objective of the lobbying campaign (success)

## What do we want to get out?

Focus your argument on the outcome or benefit that they will most align with – in the context of community and nationwide good and prosperity



## STEP 2 – Stakeholders mapping

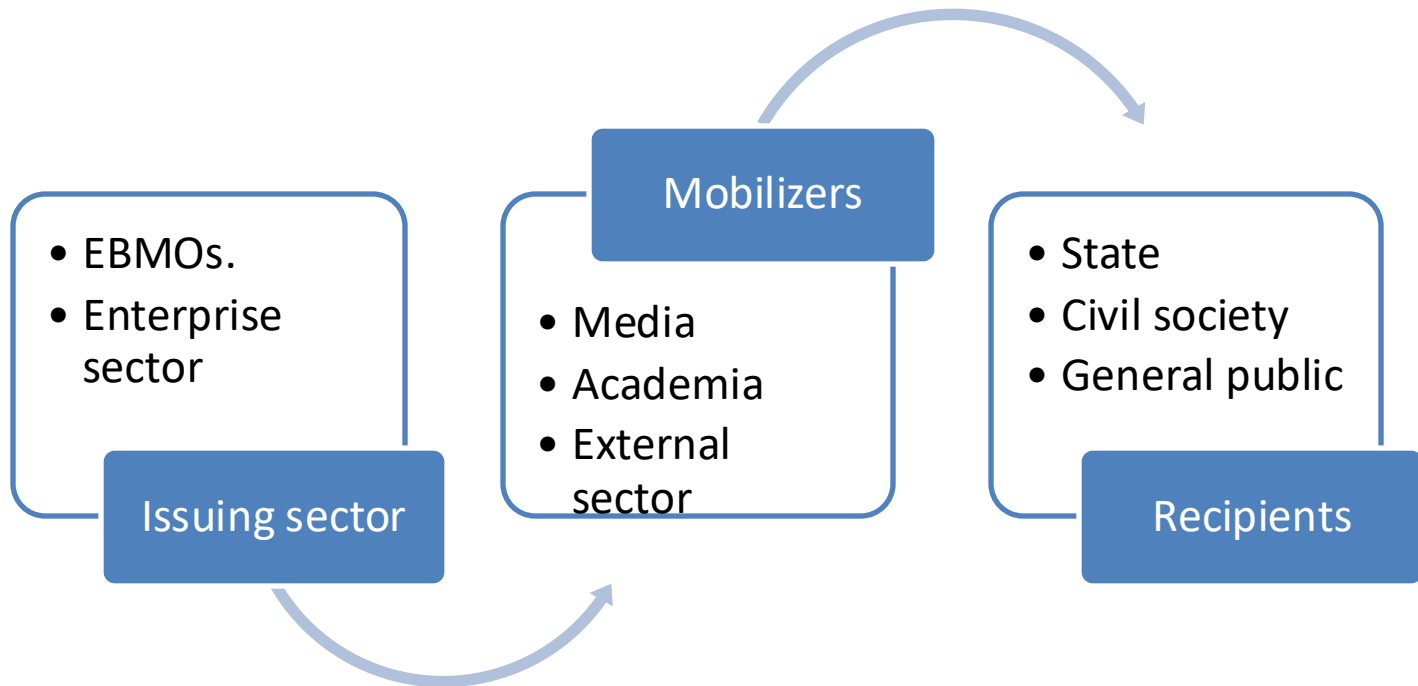
# Stakeholder Analysis: What are the 3 important groups?

## Types of stakeholders:

1. Issuing Groups: Organizations initiating advocacy (e.g., business associations, NGOs).
2. Mobilizing Groups: Media, academia, and international organizations that support or oppose efforts.
3. Target Groups: Policymakers, legislators, and the general public.







# How can you conduct a stakeholder mapping?

Stage	Description
1	Identifying actors
2	Identifying functions and roles
3	Categorization
4	Stakeholder matrix
5	Power versus influence diagram
6	Relationship diagram

# Get to know the decision-making process very well



**Step A:** —————→ **Step B:** —————→ **Step C:**

**Actors Involved**

**Actors Involved**

**Actors Involved**

Understand who are the key decision  
makers and their pathway to a decision

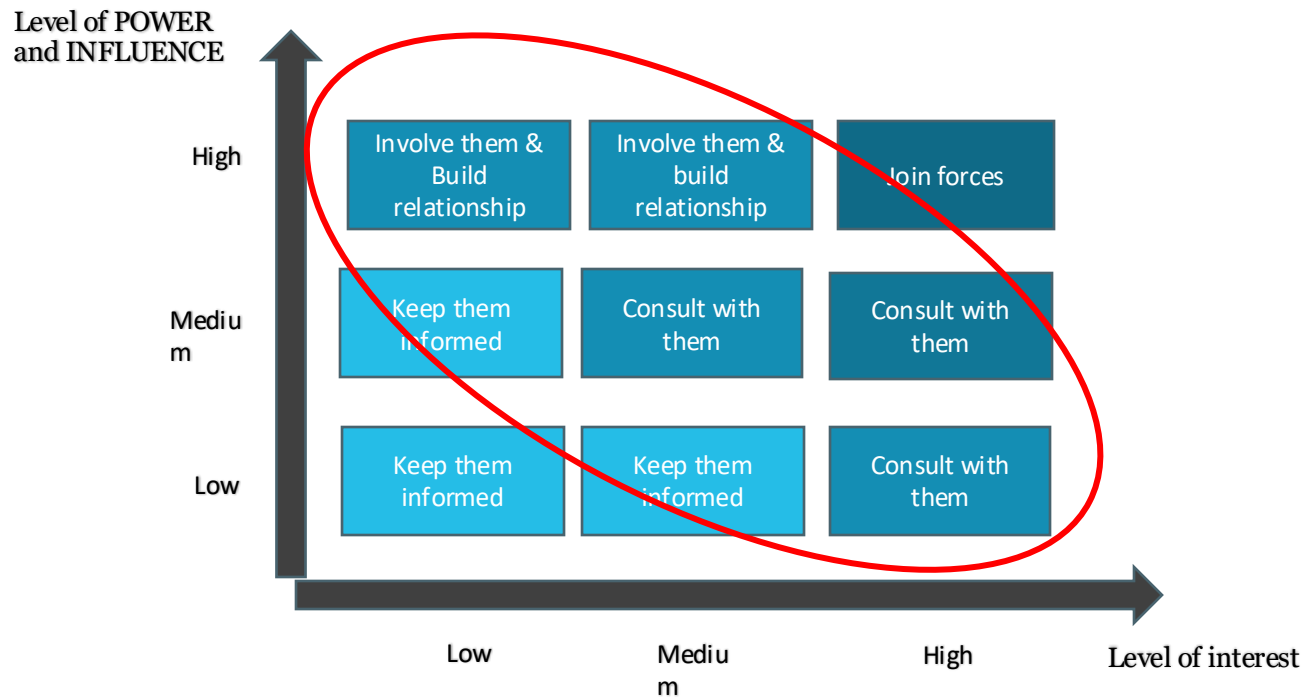
# Analysis of Political Forces



Actors in Favour

Actors Opposed

# Who needs what?



# Step 3 – Your organization capacity



Members needs – channeled through the Board or committees or directly by members

Senior Management

Research  
Institute / Team

Membership  
Unit

Communication  
/ PR /  
Marketing Unit

Policy strategy /  
Advocacy Team



## Step 4. Develop and implement the lobbying and advocacy Plan (research, policy papers, key messages, channels)

- Research
- Policy paper
- Key messages
- Lobbying and Advocacy channels – open and closed doors, spokespersons, media and social media

# What type of research do you need?



- Collecting data from primary (surveys, interviews) and secondary (reports, academic sources) sources.
- Analyzing trends, policy implications, and public perception.
- Using statistical and qualitative methods to support arguments.
- Transforming research into persuasive advocacy campaigns.

**From a research paper to a policy/position paper**  
**Best principles by Harvard Kennedy School and**  
**Harvard School of Education**

# Writing process:

## Three steps, plan accordingly:

- A. Thinking (problem definition, options/solution, outline)
- B. Writing (draft!)
- C. Editing/revision & formatting



# Step A: Thinking (Problem, audience and outline)



**It is important to write about a policy problem, not an issue. What's the difference?**

**Issue:** The geopolitics of the Arctic are shifting.

**Problem statement:** The U.S. government **lacks** tools to protect its interests in the Arctic.

# Step A: Thinking (Problem, audience and outline)

Determine audience: from the choices in the assignment prompt. And then consider:  
*Can your audience solve this problem? With what tools?*

Know your audience:

*What is their job? What keeps them up at night? What are their restraints?*



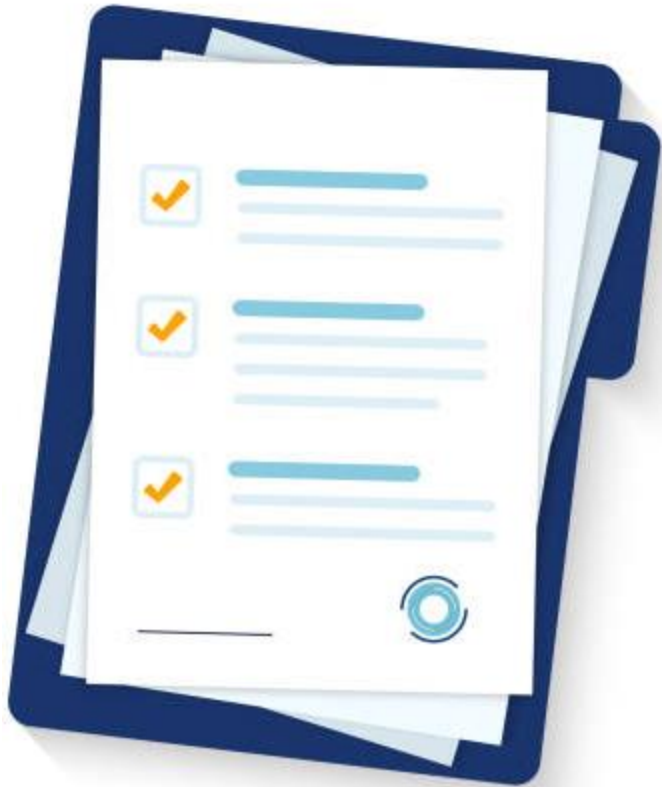


# Step A: Thinking (Problem, audience and outline)

Who is your audience?



# Step A: Thinking (Problem, audience and outline)



Create an **outline** with an understanding of memo expectations/structure:

- Start with problem/data, end with options/solution.
- Recommendations can be nuanced (more than 1) but must advise decision maker.
  - Articulate an understanding of trade-offs, counterarguments.
  - Articulate first choices, fall back positions.
  - Articulate implementation steps – how does this actually happen?

Length of 1 to 2 pages with the following structure:

**Main Point/Takeaway**

**Background**

**Evidence**

**Solutions**

# Step B: Write, a draft

What is a draft?

- It is the bones of a well-structured position / policy paper.
- But... the writing isn't yet strategic, concise. You can fix that by revising.

*Editing your position / policy papers is not a quick skim for typos. It is shifting your writing from draft to polished, useful document.*



# Step C: “User-friendly” revision:

**Edit for concision: Write short sentences, often not always.**

Don't use: actually, generally, practically, very, therefore, moreover – i.e. “fillers.”  
Simply cut these out whenever possible.

**Edit for clarity:**

Define all acronyms, or important terms, even if you think audience knows them, upfront. (Except UN, NATO, etc.)



# Step C: “User-friendly” revision:

**Edit for simplicity/clarity: i.e. bring important information up:**

\*

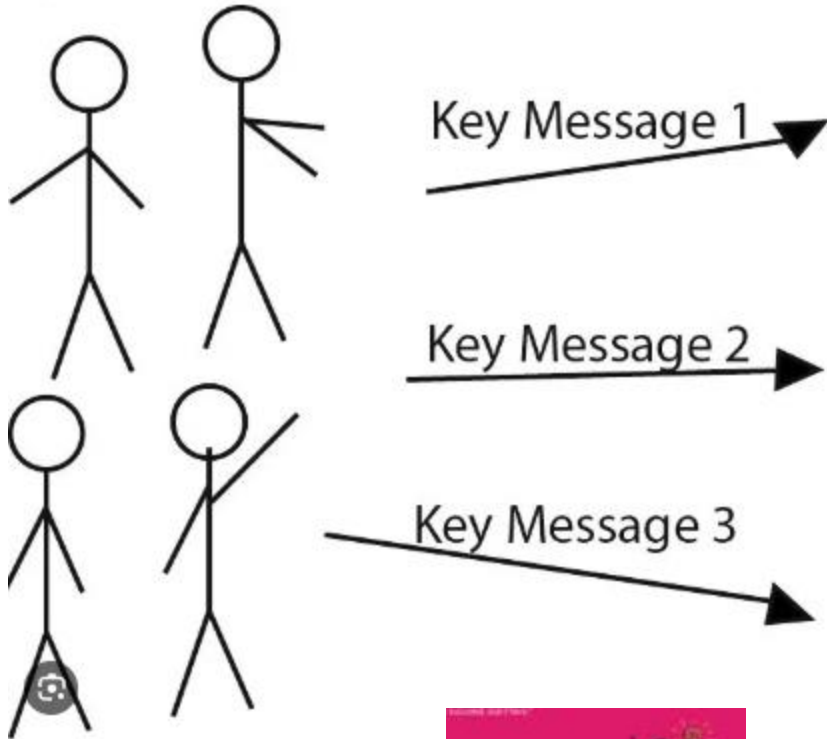
- Rather than: *It is important to note that, in Eastern states since 1980, acid rain has become a serious problem.*
- Try: *Acid rain has been a serious problem in Eastern states, since 1980.*

\*

- Rather than: *Because the press is the major medium of interaction between the President and the people, how the press portrays him really influences his popularity.*
- Try: *How the press portrays the President impacts his popularity, as the press is the major medium of interaction between the President and the people.*



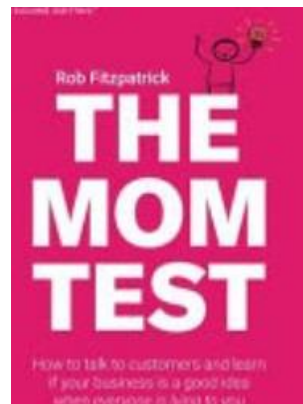
# Step C: “User-friendly” Format:



How can I make my position / policy paper “skimmable?” Use underline/bold.

- *Can the audience find the problem, key data points, and solution by skimming?*

- Use white space to please the reader. (If you can’t, cut down words).
- Footnotes are uncommon.
- Consider: is the structure logical for your audience and not repetitive?



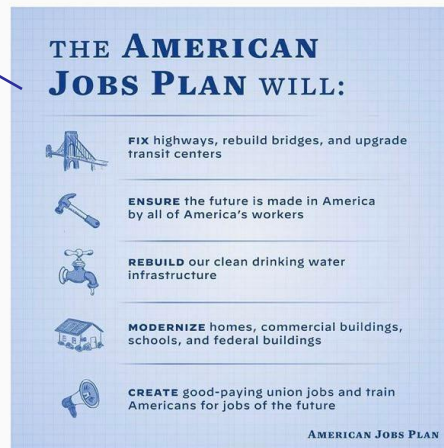
# A cohesive structure always **starts with problem** and **ends with solution**:



**Lead with problem or opportunity.**  
(Note concision here!)

**Follow with solution.**

*Audience is not ready for it until they know what it fixes. (Note bullets but use of verbs!)*



*Could follow on with a cost – like education or economic disparities (but that's not the problem itself that you are solving!)*

# Example from a CBI Position Paper

## CBI POSITION PAPER: THE ESTABLISHMENT OF A BRITISH ADVANCED RESEARCH PROJECTS AGENCY

**The creation of a British Advanced Research Projects Agency (BARPA) is an exciting opportunity to make the UK the envy of the world in research, if done right.**

As we enter a new decade and the UK seeks to establish itself as an innovation and science powerhouse, proposals to create a new research agency modelled on the US ARPA should be seized. It is an opportunity to increase long-term, high-risk R&D across the UK and to solve intractable social and technical challenges. BARPA must represent a bold new brand for UK innovation which can attract the brightest and best talent, serve as an international lynchpin for business investment and ultimately deliver new products which make a difference.

Existing proposals are right to highlight big data and AI as the two areas of priority for the new agency and its research. This compliments findings from the CBI's latest Tech Tracker survey which suggested AI to be one of the key technologies' businesses will invest in over the next five years.<sup>1</sup>

To achieve the goals set out above, the CBI recommends that government consider three priorities when establishing the new agency: an ambitious long-term funding model, creating a new culture for developing high-risk innovation and strong engagement between government and business.

### **1) The new agency cannot be a flash in the pan so long-term funding is non-negotiable for success.**

#### **High-risk research requires high levels of long-term funding**

Despite its potential benefits, high-risk research is costly, and the lack of funding can serve as a deterrent to businesses wanting to undertake this research through fear of the unknown.

The £800 million proposed over five years by the government to fund the new agency represents a good starting point. As any new institution will likely need to be piloted, this sum would be enough to test an early prototype and gather operational insights. If successful, this funding would need to be reviewed, and put on a sustained footing. Former Universities Minister David Willetts recently suggested that funding would need to be around £200 million a year to be proportionate to DAPRA, a slight increase on the initial funding suggested.<sup>2</sup>

#### **Funding the new agency outside of London could serve as a catalyst for regional growth**

Establishing the new institution in one of the growing regional hubs for research should be factored into initial government investment plans. Not only would this support the levelling up of regions it could also help to unlock a wider pool of talent.

It is estimated that a greater focus on accelerating R&D investment in the worst performing regions could provide a £7.3 billion boost to UK R&D spend, yet R&D investment is concentrated in South East, East of England and London.<sup>3</sup>

### **2) Creating a new culture for developing high-risk innovation should be prioritised.**

#### **BARPA needs to operate within a strong innovation environment**

The US ARPA model is independent and operates outside of the traditional oversight structures of departments such as defence and energy. This independence should be mirrored by BARPA as it allows the agency to own the delivery of high-risk innovation without institutional restraints.

This independence would mean that BARPA would have to sit away from the existing innovation structure of UKRI and Innovate UK. A close relationship will still be vital. UKRI and Innovate UK will essentially be responsible for creating the wider research environment. The whole UK innovation ecosystem will need to work in collaboration to meet the broader goal and pull towards the 2.4% R&D target.

#### **Developing products with a clear focus on the customer**

By having a clear customer and market in mind BARPA will be better equipped to translate cutting edge research into new innovations with a purpose. Much of the success of the ARPA programs in the US can be attributed to the implementation of an "extended pipeline" model, where government departments, acting as customers, support innovation through every stage of development, helping to bridge the "valley of death" between research and commercially viable technologies.<sup>4</sup>

The Department of Health seems especially well suited to act as the key driver for the new agency and serve as a buyer for future commercialisation. As one of the highest sources of government expenditure as a percentage of GDP in the UK, public health is undoubtedly an area that would benefit from greater innovation. The NHS has significant buying power and a potentially rich data pool through NHS X that would make significant developments incredibly marketable. Grand challenge issues such as the aging society also provide a clear focus for investment.

Energy is another area that could benefit from high-risk, high reward innovation, particularly given Government's Net Zero commitments. Using the agency to develop new carbon capture and carbon storage technologies could support the UK's aim to be a world leader in addressing climate challenges.

### **3) Business and government engagement must lie at the heart of BARPA's strategy.**

Whilst government will be driving the creation of BARPA, industry expertise and funding will be an important factor in its long-term ability to bridge the gap between blue sky research and marketable products. Government and business should work closely together to create and develop the new agency.

#### **Establishing an exciting new global brand which serves as a magnet for talent**

The agency's brand will need to be bold if it is to make an impact both nationally and internationally. A strong brand is especially important when it comes to competing with academia to attract the brightest and best scientists, researchers and programme managers.

To do this government must be ambitious with its marketing of BARPA, starting with identifying a new name and mission statement which inspires and encompasses its purpose and vision in a meaningful way, drawing upon the support of industry to do so.

#### **Proportionate IP legislations are needed to foster collaboration**

Businesses have highlighted that encouraging private sector investment and collaboration will require significant levels of contractual flexibility within the agency. This is especially important when it comes to issues surrounding ownership of intellectual property (IP) that often arise from innovation projects and can weaken relationships.

#### **Regular opportunities to invest in products developed by BARPA**

As new technologies are being created and developed by BARPA businesses should be offered the chance to invest in them. This investment could take the form of financial, technical or marketing support. For projects early in the development phase this can help de-risk investment. Investments in projects further down the line can enable products to reach wider audiences and markets as they are then sold by business.

Establishing a dedicated commercialisation team within BARPA comprising of industry leads could support with this.

<sup>1</sup> CBI 'Tech Tracker' (<https://www.cbi.org.uk/policy-focus/innovation-and-digital/articles/tech-tracker-2019-the-what-know-technology-and-innovation-trends/>, 2019)

<sup>2</sup> David Willetts, The Road to 2.4%: Transforming Britain's R&D performance (The Policy Institute, 2019)

<sup>3</sup> CBI analysis based on ONS (2019) Gross domestic expenditure on research and development, UK: 2017 – see appendix Exhibit 4

Bring the bottom line upfront (BLUF) -- (your audience should know What's wrong and What to do about it in the first paragraph).

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# Stabilizing Venezuela: Scenarios and Options

## Contingency Planning Memorandum Update

The Venezuelan crisis threatens the interests and security of the United States and Venezuela's neighbors. The United States and regional partners need to provide humanitarian relief and security assistance and accelerate change to a post-Maduro democracy.



An opposition demonstrator walks near a bus in flames during clashes with soldiers loyal to Venezuelan President Nicolas Maduro in the surroundings of La Carlota military base in Caracas on April 30, 2019. Federico Parra/AFP/Getty Images

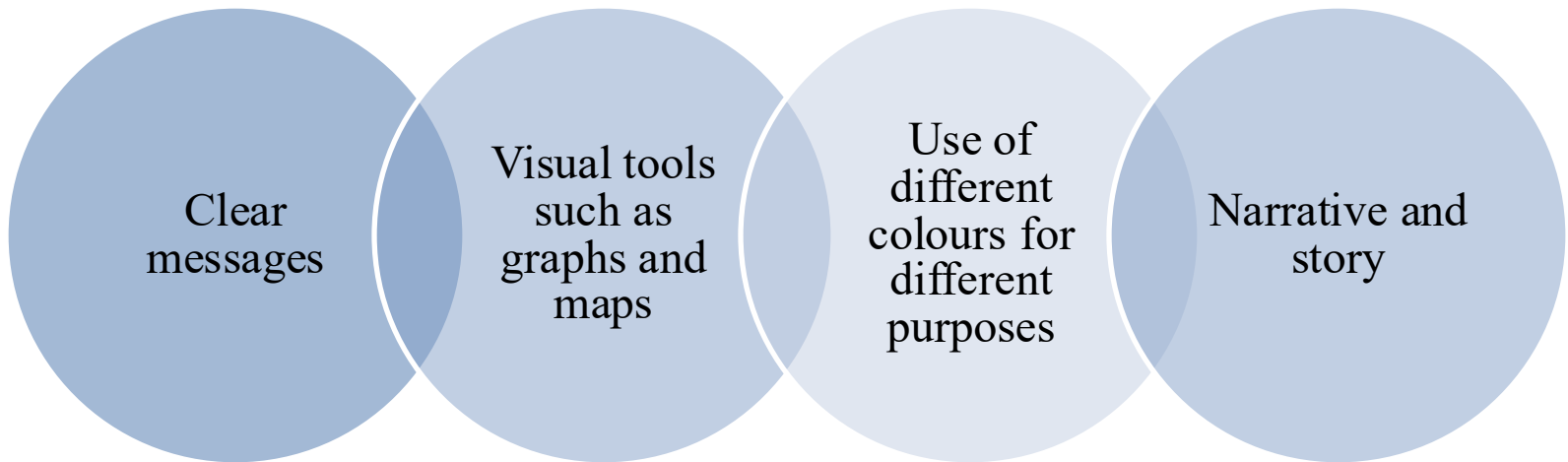
## Introduction

Frank O. Mora  
Director, Kimberly Green Latin  
American and Caribbean Center,  
Florida International University

The political situation inside Venezuela remains volatile following the failed April 30, 2019, civil-military rebellion, known as Operacion Libertad, against the Nicolas Maduro regime. The Venezuelan economy also continues to deteriorate, causing widespread humanitarian distress and large-scale outflows of refugees to neighboring countries. Potential state collapse and the spillover effects of the humanitarian crisis and insecurity threaten the stability of the hemisphere. Given U.S. interests in Venezuela and the region, the Donald J. Trump administration should consider how the crisis could worsen and consider a range of policy options to help stabilize Venezuela. Preparing for an immediate post-Maduro Venezuela is as important as hastening political change. "Showing the future" to regime elements, including how they can be part of the country's stabilization and reconstruction, could create the conditions to initiate a democratic transition. As such, this

<https://www.cfr.org/report/stabilizing-venezuela>

# From investigation or policy papers to concise take aways for media and social media





# What strategic communication can you implement?

Events and  
campaigns

Social media  
and digital  
media

Mass media

Strategic  
spokespeople

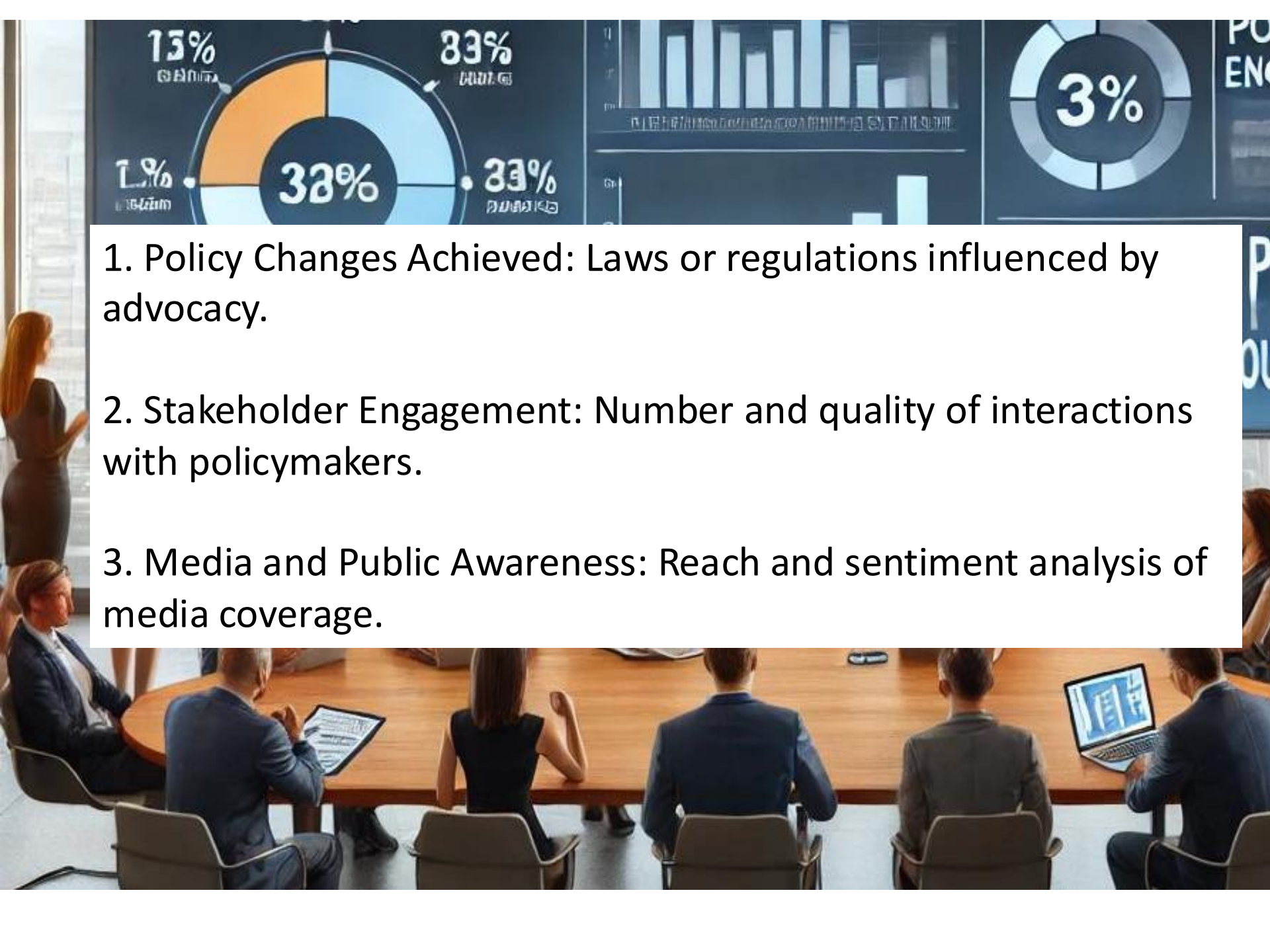
# Choosing and providing media training to spokespersons





## Step 5. Monitor progress and evaluate results



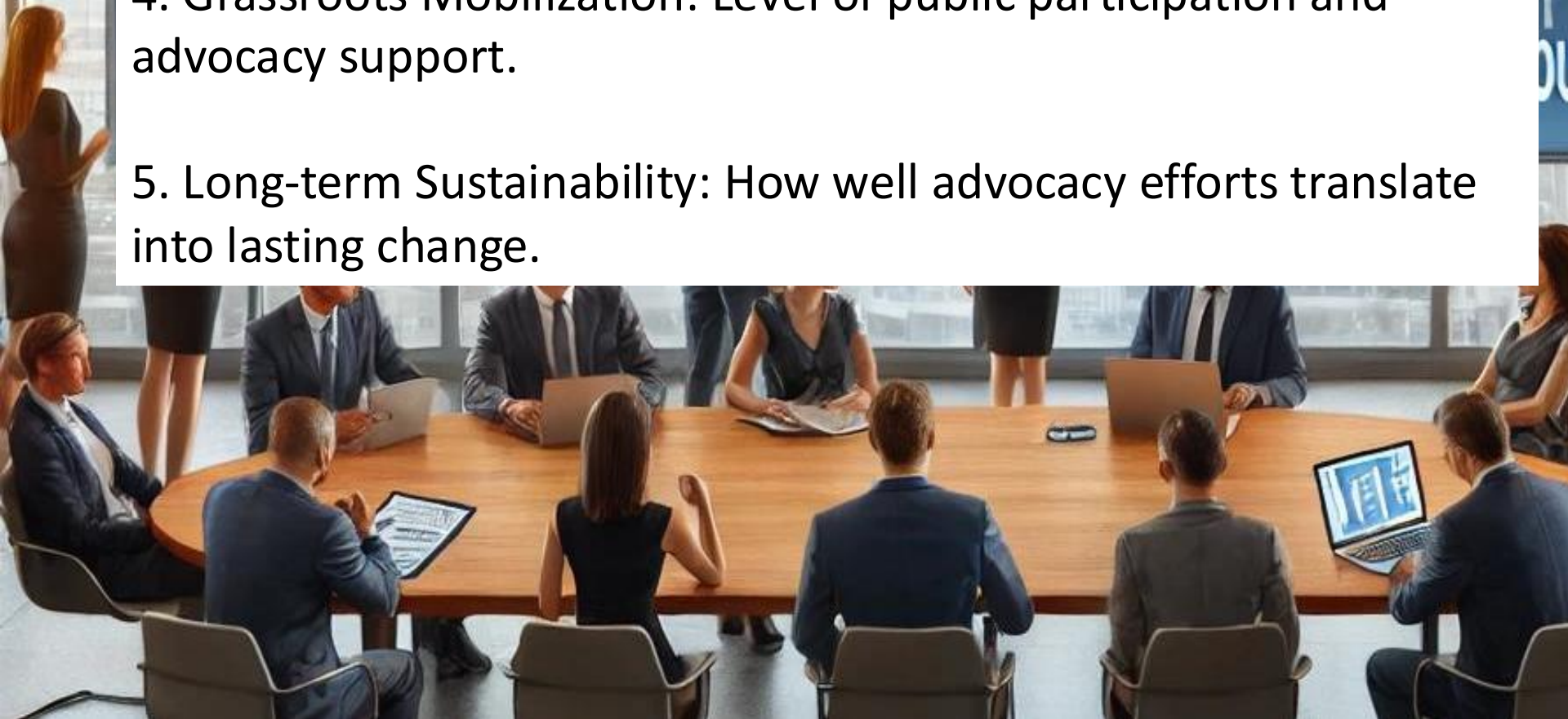


1. Policy Changes Achieved: Laws or regulations influenced by advocacy.
2. Stakeholder Engagement: Number and quality of interactions with policymakers.
3. Media and Public Awareness: Reach and sentiment analysis of media coverage.



4. Grassroots Mobilization: Level of public participation and advocacy support.

5. Long-term Sustainability: How well advocacy efforts translate into lasting change.



# Group discussion

Who will measure the success of the lobbying campaign?

What would success look like?

Which KPIs to use?

