

# **OPEN\_NEXT**

## **Deliverable 4.1**

First release of the co-creation demonstrator framework



This project is funded by the European Union’s Horizon 2020 Research and Innovation Programme under the Grand Agreement no. 869984.

## OPEN\_NEXT – Transforming collaborative product creation

### Consortium:

#	Participant Legal Name	Short Name	Country
1	TECHNISCHE UNIVERSITÄT BERLIN	TUB	DE
2	INSTITUT POLYTECHNIQUE DE GRENOBLE	GINP	FR
3	ALEXANDER VON HUMBOLDT-INSTITUT FÜR INTERNET UND GESELLSCHAFT GMBH	HIIG	DE
4	UNIVERSITY OF BATH	UBA	UK
5	ZENTRUM FÜR SOZIALE INNOVATION GMBH	ZSI	AT
6	FRAUNHOFER GESELLSCHAFT ZUR FÖRDERUNG DER ANGEWANDTEN FORSCHUNG E.V.	FHG	DE
7	DANSK DESIGN CENTER APS	DDC	DK
8	WIKIMEDIA DEUTSCHLAND - GESELLSCHAFT ZUR FÖRDERUNG FREIEN WISSENS EV	WMDE	DE
9	WIKIFACTORY EUROPE SL	WIF	ES
10	STICHTING WAAG SOCIETY	WAAG	NL
11	MAKER	MAK	DK
12	AGILE HEAP EV	FLB	DE
13	SONO MOTORS GMBH	SOM	DE
14	OPNTEC GMBH	OPT	DE
15	STYKKA APS	STY	DK
16	TILL WOLFER	XYZC	DE
17	FICTION FACTORY	FIF	NL
18	M2M4ALL	SOD	NL
19	INNOC ÖSTERREICHISCHE GESELLSCHAFT FÜR INNOVATIVE COMPUTERWISSENSCHAFTEN	HAL	AT

Duration: 09/2019-08/2022

Grant: H2020-869984

Contact (coordinator): Prof Dr-Ing Roland JOCHEM

Address: Technische Universität Berlin, Sekretariat PTZ 3, Pascalstr. 8-9, 10587 Berlin

E-mail: [roland.jochem@tu-berlin.de](mailto:roland.jochem@tu-berlin.de)

**Disclaimer:** The contents of this document are not intended to replace consultation of any applicable legal sources or the necessary advice of a legal expert, where appropriate. All information in this document is provided "as is" and no guarantee or warranty is given that the information is fit for any particular purpose. The user, therefore, uses the information at his/her sole risk and liability. For the avoidance of all doubts, the European Commission has no liability in respect of this document, which is merely representing the views of the author(s).

## D4.1 – Draft demonstrator Framework

---

Review and approval status:

	Name and Surname	Role in the Project	Partner
<b>Author(s)</b>	Christian Villum, Oskar Stockholm Østergaard, Sophia Rose Lincoln	Project lead, Project manager, Project assistant	DDC
<b>Reviewed by</b>	Sonika Gogineni	Project manager	FHG
	Stephan Bohn	Project manager	HIIG
<b>Approved by</b>	Robert Mies	Coordinator	TUB

History of changes:

Version	Date	Description of changes	By
0.1	16.05.2020	Initial draft for review	Christian Villum, Oskar Stockholm Østergaard, Sophia Rose Lincoln
...	...	...	...
...	...	...	...

Details:

<b>Dissemination level</b>	Open Access
<b>Due date</b>	28.05.2020
<b>Issue date</b>	28.05.2020
<b>Contract No.</b>	869984
<b>Responsible Partner</b>	DDC
<b>File name</b>	D4.1_First_release_of_co-creation_demonstrator_framework.pdf

Keywords:

Open source hardware, open design, company-community collaboration, framework, check-list, user journey, activities

Abstract:

This deliverable contains the first version of the demonstrator framework which consists of a main guide, primer checklists for fabrication labs (called Labs) and SME's, and catalogue of recommended activities. The main guide works as a welcome introduction for SMEs and Labs to the OPENNEXT open-source collaboration journey and provides an overview of the OPENNEXT strategic aim.

It is intended to help Labs and SMEs in preliminary phase decision-making in planning their collaboration journey. The primer checklists further prepare the labs and SMEs for the journey, by ensuring that they understand implications, reflect on the foregoing process, and align values

by seeing eye to eye with each other. The catalogue of recommended activities provides Labs and SMEs with examples of activities that can be organized together in a customized collaboration journey, and which will help them set and achieve the goals of the collaboration.

## List of abbreviations and terms

C3	Company-community collaboration
EU	European Union
OSH	Open source hardware
SME	Small and medium-sized enterprises
LAB	Fabrication Laboratories
DDC	Danish Design Center

## Rationale for choosing a graphical style

The rest of this document is crafted in a graphical style rather than conventional word processing style (Microsoft Word). This choice has been made because the document is a publicly facing resource, which will be used outside of scientific circles. Concretely it is intended to be used actively in the preparation of the Company-community collaborations (C3s) by the two key OPENNEXT target groups: Small and medium-sized enterprises (SMEs) and Fabrication Laboratories (Labs). We estimate that the graphical style we have chosen will make it easier for these audiences to use the document, including the embedded tools that are to be printed and used in workshop settings described herein.



Delivery 4.1

**Draft demonstrator framework**

# Contents

Introduction	1
Target audience	3
Components	4
Future inclusions	6
Appendix A – Primer checklist guide	
1A (for SME)	A6
1B (for lab)	A10
2 (for both SME and Lab)	A16
3A (For SME)	A21
3B (for lab)	A24
Appendix B – Primer checklist	
1A (for SME)	B3
1B (for lab)	B12
2 (for both SME and Lab)	B23
3A (For SME)	B35
3B (for lab)	B41
Appendix C – Catalogue of Recommended Activities	
Appendix D – Collaboration Journey Poster	

# Introduction

Today's industrial product creation is expensive, risky and unsustainable. At the same time, the process is highly inaccessible to consumers who have very little input in the design and distribution of the finished product.

Presently, SMEs and maker communities across Europe are coming together to fundamentally change the way we create, produce, and distribute products. By sharing ideas and knowledge openly on digital platforms, the project of 19 partners in EU-countries called OPENNEXT, will establish new collaborations between companies and consumers. The participating projects include eco-friendly mobility, consumer electronics, and built-to-order furniture. OPENNEXT seeks to empower both companies and consumers to co-design and co-manufacture products based on new mindsets, new business models, and new collaborative software solutions.

OPENNEXT is a Horizon 2020 research and innovation program funded by the European Commission under Grant Agreement No. 869984. The project envisions a strategic company community collaboration, fundamentally changing how products can be created, produced, and distributed in the future.

To learn more about OPENNEXT please have a look at [our website](#).

## Understanding this document

This document outlines the OPENNEXT Demonstrator Framework, a framework designed to guarantee a smooth, fruitful collaboration between Small Medium-sized Enterprises (SMEs) and digital fabrication labs (labs). This document aims to provide a holistic overview of the framework and its key components.

This is meant to be a welcome introduction to the OPENNEXT open-source collaboration journey. A journey that allows both SMEs and labs to explore new horizons of possible strategic collaborations ranging from co-Design to open/distributed manufacturing. On those grounds, we recommend it to be your first read.

## Open-source Hardware

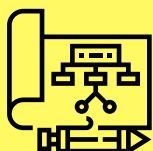
OPENNEXT is based on [open-source hardware](#). The concept is similar to open-source software but focuses on physical objects. The concept of open-source hardware will be discussed later in this document. It is, however, important to note that you can do open-source hardware in various ways. Neither open-source hardware nor OPENNEXT requires a business to make everything available in the public domain or giving up rights.

## Working with a community

A central part of OPENNEXT is collaborating with communities. A community is a group of people with diverse characteristics who are linked by social ties, share common perspectives, and engage in joint action. Within the OPENNEXT we identify communities of interest and practice as well as those of concern. While those of interest and practice might have high experience and technological skills, those of concern have higher motivation and urgency as final users of the outcomes. Involving them into the early stages of the innovation process contributes also to the final success. However, due to the usually voluntary nature of their participation, they need to be represented by makerspaces or SMEs.

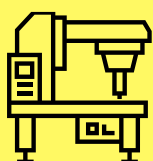


# Target audience



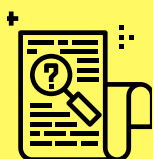
## **SMEs**

SMEs, who manufacture physical products (hardware, in the broadest definition of the word) and seek to innovate their product development and manufacturing towards a new business model based on open source principles and empowerment of users towards becoming co-creators. SMEs will be invited to participate in three rounds: Pilots (6 SMEs, partners in the CE H2020-funded OPENNEXT program), demonstrators (12 SMEs, to be recruited as part of the project) and finally in an “open market” version of the demonstrator to be offered in Labs around the world on market terms after the CE H2020-funded project ends.



## **Labs**

Labs, as creative hubs for open source maker culture, who will act as experts on community building and facilitators of the learning journey for the SMEs, while at the same time developing the OPENNEXT Demonstrator Framework as a business offering to be offered after the conclusion of EC H2020-funded project.



## **Research partners**

Research partners, who throughout the EC H2020-funded project period will conduct research to help build the OPENNEXT Demonstrator Framework as well as derive and publish learnings from the pilots and demonstrators.



## **Community members**

Other community members, who will mainly be represented by makerspaces, but act independently with their concerns, emergencies, or interests.

# Components

The OPENNEXT Demonstrator Framework is made up of three main components:

## 1 – The main guide

*(This document)*

Provides the OPENNEXT collaboration journey participant (SME or a Lab) with an overall higher-level view of the demonstrator framework to understand the strategic aim behind the journey. The main guide assist the potential participants in the decision-making process to take part and defines the road map and the navigation routes.

## 2 – The primer checklists

*(Appendix A+B)*

Aims at making sure both parties (SME and Lab) can prepare themselves effectively. The checklists consist of two things; a checklist guide (appendix A, to be read first) and actual checklists (appendix B). The checklists have three stages. Some parts of the checklists are designed to be filled by SMEs and Labs individually while others are ment to be discussed and filled out together once a potential match has been made. The stages are:

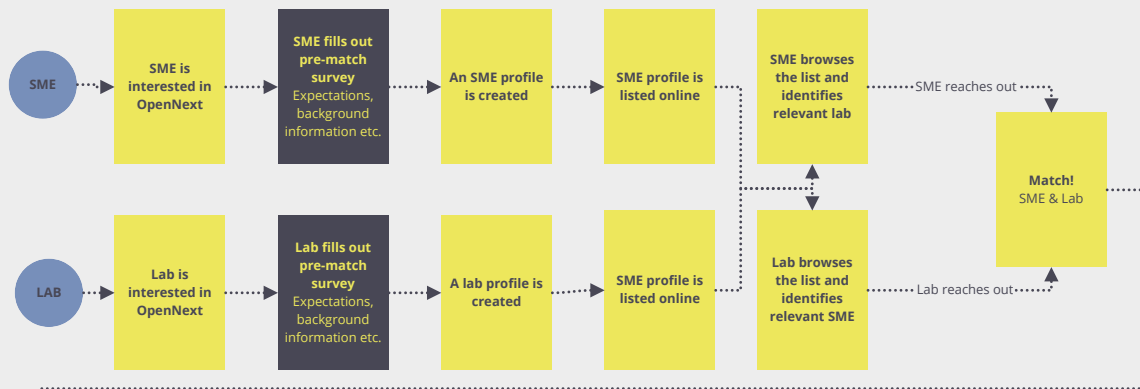
1. **“Finding the right match”** (individual checklists for SME and Lab)
2. **“Seeing eye to eye”** (joint deadline for SME and Lab together)
3. **“Getting off on the right foot”** (individual checklists for SME and Lab)

## 3 – Catalog of recommended activities & collaboration journey exercise

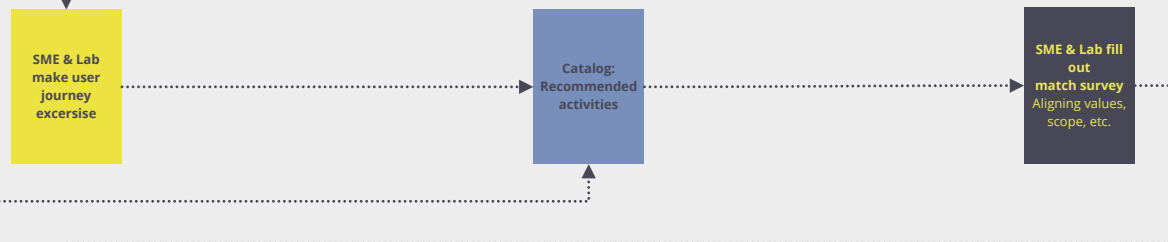
*(Appendix C)*

Aims at supporting the SME/lab teams in initiating their collaboration by kickstarting their planning process. The catalog of recommended activities contains a collection of suggestions from participating SMEs and labs and can be used in combination with the collaboration journey exercise to explore potential “journeys” through OPENNEXT.

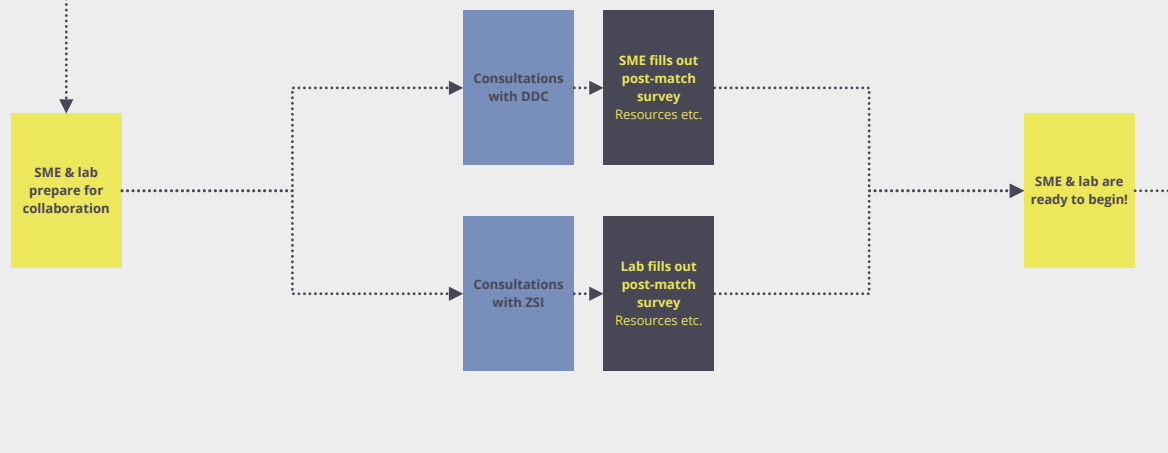
## Checklist step 1 Finding the right match



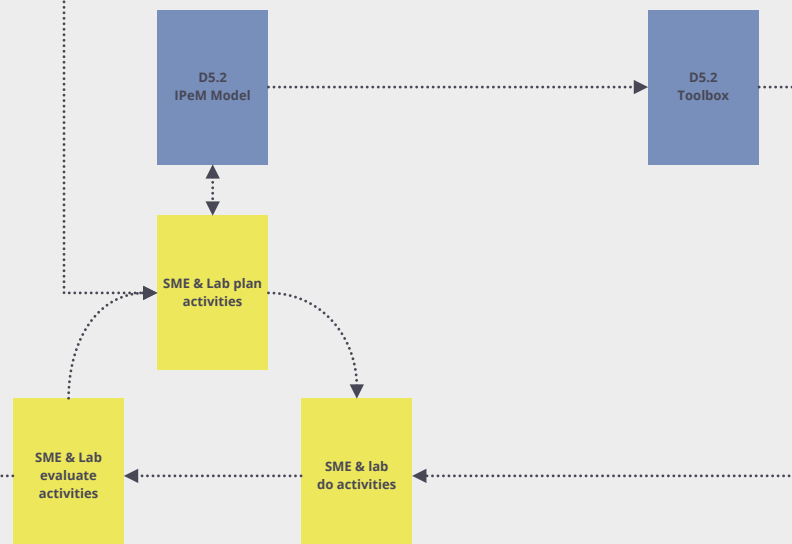
## Checklist step 2 Seeing eye to eye



## Checklist step 3 Getting off on the right foot



## Collaboration is live



# Future inclusions

## Examples / cases

After the OPENNEXT pilots are finalized, future editions of this document will include examples/cases.

## Peer-to-peer support

OPENNEXT is based on a principle of peer-to-peer innovation, and a cornerstone in this principle is the facilitation of peer-to-peer sparring, knowledge-sharing and support between the participating SMEs and Labs. This collective support mechanism will be developed and supported across different of tasks (for instance the work in WP3, and WP4's own T4.2 and D4.5) as well as different digital tools centered around the Wikifactory platform.

## Consultations

Somewhat related to the peer-to-peer support work outlined above, the SMEs and Labs will furthermore be offered consultations to help them fully understand the framework and their upcoming collaboration in advance of its beginning.

In the pilot stages of the OPENNEXT project these consultations will be offered by the OPENNEXT consortium, but further down the road (for the later demonstrators and also beyond the duration of the OPENNEXT project) the intention is to have experienced Labs offer such consultations to both SMEs and new Labs joining the OPENNEXT global community.

## Collaboration formats

At this point it is undecided what duration the C3s will have. The pilots will help to generate data on ideal timelines. It is expected that it will be ideal with different formats depending on the needs of the specific SME; for instance that there will be 8-week and 24-weeks versions of the OPENNEXT collaborations, and perhaps also an open-ended version for ongoing collaborations.

# Appendix A

SMEs and Makerspaces  
**Primer checklist guide**

## Introduction

Welcome to the **OPENNEXT Primer Checklists** for Labs and SMEs, which aims to make sure the both parties can prepare themselves more effectively, both independently and together.

This document is an obligatory read for any party (SME or Lab) entering into OPENNEXT, and must be completed as the first action in the OPENNEXT Demonstrator Framework, after reading the **OPENNEXT Demonstrator Framework Main Guide**.

## Structure

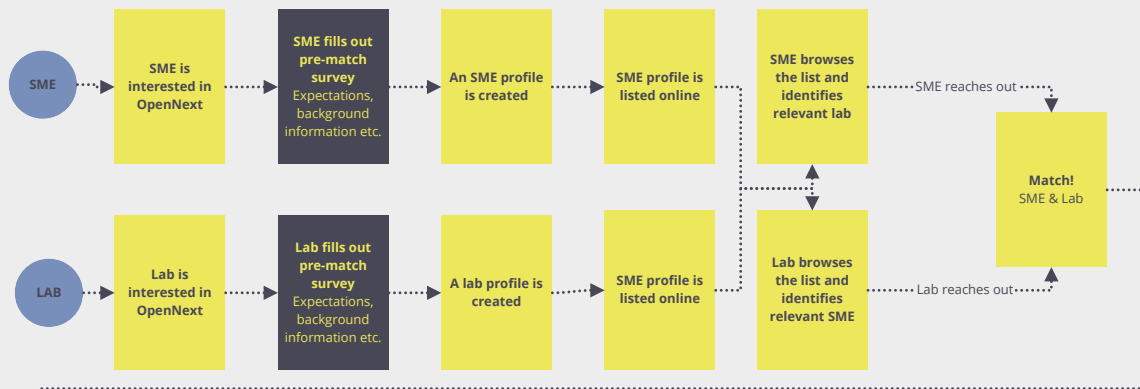
The document is made up of two main components: A guide to the Checklists, and the actual Checklists to be found in the appendix section in the end.

The idea is that first you read the guide, and then you fill out the checklists. Some of these checklists are to be filled out independently, and some you will fill out together, as visualized on the following page.

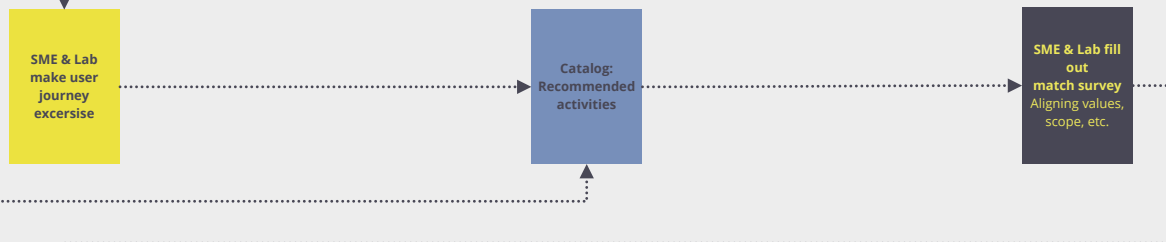
The filling of the checklists has 3 stages:

1. **“Finding the right match”** (individual checklists for SMEs and Labs)
2. **“Seeing eye to eye”** (joint checklist SMEs and Lab together)
3. **“Getting off on the right foot”** (individual checklists for SME and Lab)

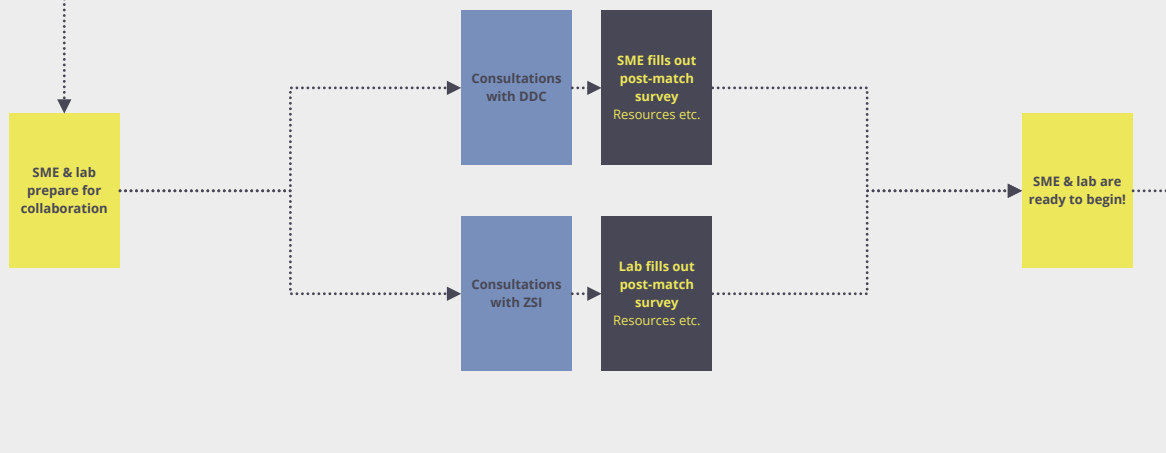
## Checklist step 1 Finding the right match



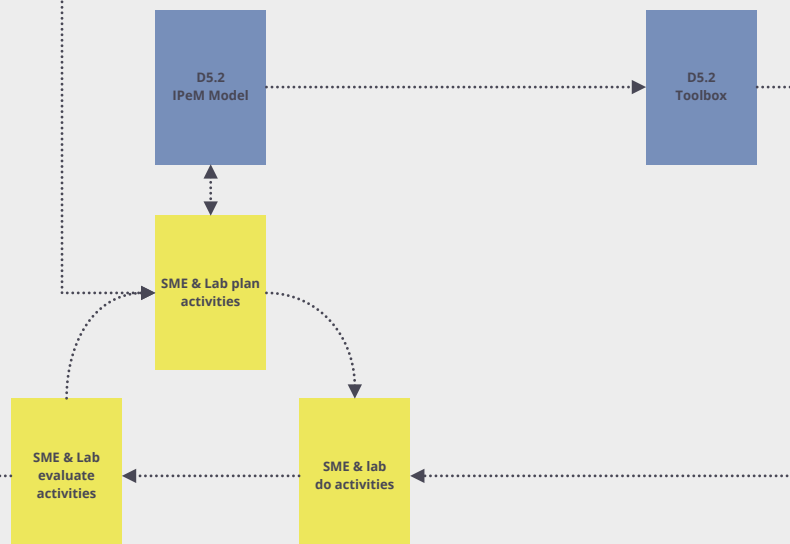
## Checklist step 2 Seeing eye to eye



## Checklist step 3 Getting off on the right foot



## Collaboration is live





## Timeline

The completion of the Checklists is estimated to take between 2-4 weeks (pending SME and Lab availability in meeting for the work related to the joint checklist). After this the actual OPENNEXT user journey (to be tested first in the pilots) is expected to take 8-16 weeks. This duration may be changed based on the learnings in the pilots before the OPENNEXT project moves on to the next iteration phase (ie. the demonstrator-stage with 12 new SMEs).

## Outcome

SMEs and Labs, upon having filled out the Checklist, will have a firm understanding of the following:

1. Whether OPENNEXT is a good match for them – or not.
2. What their concrete purpose for initiating an OPENNEXT process together is.
3. What needs they have and seek to fill during OPENNEXT.
4. What obligations that come with being part of OPENNEXT and what their role is.
5. What resources are needed from their side in order to take part in OPENNEXT.

# Step 1 of 3

## **Finding The Right Match**

Individual checklists for SMEs and labs

**1A – For SMEs**

This is the first part of the checklist that you will fill out as SME, before you meet up with the lab you will be collaborating with. On the following pages we will briefly take you through the questions you will be answering and reflecting on in the first part of the appendix survey:

- Understanding OPENNEXT and matching expectations
- Getting familiar with your specific role
- Understanding what open source means
- Getting your leadership on board
- Set your purpose for taking part and Uncover your needs
- Setting your team

# 1A – for SMEs

## Understanding OPENNEXT & matching expectations

Before embarking on the OPENNEXT journey, we want to make sure that you and your company are as prepared as possible for what is to come. We want to make sure that you fully understand the OPENNEXT project, and that your expectations are aligned with the expectations of the lab you will be collaborating with.

This checklist document will make sure that you know exactly what it is that you're signing up for if you join OPENNEXT: It will cover what OPENNEXT can – and cannot – help you with, as well as ensure that you are prepared for the implications of peer-to-peer based learning. Another way to say that learning in OPENNEXT is a matter of "give and take."

## Getting familiar with your specific role

You should have a clear understanding of your specific role as SME before you begin. That means being familiar with (and equipped for) what is required of you as an SME in OPENNEXT, what your specific responsibilities are, and where they overlap with the roles and responsibilities of the lab you will be collaborating with.

## Understanding what open source means

Before starting we want to make sure you and your team have a thorough understanding of what open source means. In this section you will be provided with a basic explanation where you will be introduced to open source hardware. You are also provided with a selection of informative links.

This section should also give you clarity about whether open source production holds potential for your company.

## Getting your leadership on board

Having leadership (decision makers) from your company sign off on your OPENNEXT engagement is crucial, since the outcome of the engagement will likely challenge existing business practice. It is recommended to always have sign-off from someone in the top management of the company, and ideally also someone senior from product development and/or innovation practice.

This part of the checklist will prepare your company leadership for the OPENNEXT engagement. You should consider whether the right decision makers from your company are on board, that they know their role throughout the engagement, and that everything is in alignment with your company strategy.

## Set your purpose for taking part and Uncover your needs

This part will help you clarify your purpose for taking part in OPENNEXT, and help you uncover your specific needs. Both might change along the way, but having clarity at the outset is critical for a smooth experience. The checklist will help you make sure you know what you want to achieve, whether it is strategy, product development, or a new business model, and what you need to get there.

[The questions in this part of the Checklist will be all those developed in the T4.5 Impact Assessment materials]

## Setting your team

Before the outset it is important to have composed the right team for your OPENNEXT journey.

Composing the best team could mean combining people from different areas and levels. A cross-disciplinary team with a strong anchoring with the relevant decision makers is optimal. An example could be a team with representatives from leadership, innovation, production, etc, according to the specific resources in your company.

Part of this is also to figure out who will lead your team: The best leaders for your team will be those who sense a real opportunity for growth and learning. OPENNEXT can be both incredibly rewarding and quite demanding, and we recommend that the people at the frontlines of your team are not only prepared but excited for what they're getting into. Also, proactivity goes a long way when you're

set in an environment brimming with the available knowledge from Labs, mentors and fellow SMEs.

**1B – For labs**

This is the first part of the checklist that you will fill out as LAB, before you meet up with the SME you will be collaborating with. On the following pages we will briefly take you through the questions you will be answering and reflecting on in the first part of the appendix survey:

- Understanding OPENNEXT and matching expectations
- Getting familiar with your role
- Understanding what open source means
- Getting familiar with the OPENNEXT resources
- Facilities
- Preparing your community
- Setting your team
- How will you learn
- Preparing your visual collaboration journey

# 1B – For labs

## Understanding OPENNEXT & matching expectations

Before embarking on the OPENNEXT journey, we want to make sure that your lab is as prepared as possible for what is to come. We want to make sure that you fully understand the OPENNEXT project, and that your expectations are aligned with the expectations of the SME you will be collaborating with.

In this checklist/survey we will make sure that you know exactly what it is that you are about to do if you join OPENNEXT.

It will cover what OPENNEXT can – and cannot help you with, as well as ensure that you are prepared for the implications of peer based learning – that means learning by "give and take".

## Getting familiar with your role

The survey will ensure that your specific role as lab is clear to you before you begin. That means being familiar with, and equipped for what is required of you as lab in OPENNEXT, what your specific responsibilities are, and where these overlap with the roles and responsibilities of the SME you will be collaborating with.

## Understanding what open source means

Before starting we want to make sure you and your lab have a thorough understanding of what open source means. In this section you will be provided with a basic explanation where you will be introduced to open source hardware. You are also provided with a selection of informative links.

This section should also provide you clarity about whether open source production holds potential for your lab.



## Getting familiar with the OPENNEXT resources

Before you begin your journey and collaboration with the SME, we want to make sure that you are familiar with all the different resources OPENNEXT provides for you in order to create your shared journey. These include the Recommended Activities Catalogue, the Collaboration Journeys tool and this checklist (etc). This section will make sure that you understand all of them and what they require of you as facilitator. It is also important that you are certain that you can facilitate all the modules.

## Facilities

As lab you are the one providing the physical facilities needed to carry out the collaboration. Therefore it is crucial that you have all the proper facilities ready and available. These include the right physical space, digital tools, an active community, and more.

Here are two lists: One with must-haves facilities (ie. meeting rooms, event space for community meetups, simple prototyping technology, etc.) and one with nice-to-haves (ie. advanced digital fabrication technology, etc.).

- [Link must-have]
- [Link nice-to-have]

Read through them to get an overview of what facilities you must have, and which facilities you may lack and will need to gain access to in other ways than having them in your Lab.

Please document in the survey which facilities you have.

## Preparing your community

Is your community aware of the upcoming interactions with SMEs? Your community is an important part of the OPENNEXT project, and it is important that they are aware of the upcoming opportunity. Do some of them see how this is an opportunity for mutual learning/benefit?

Since some of the communities might predate the OPENNEXT project, the demonstrator framework offers an entry for them through the

labs, who further manage their involvement in individual innovation journeys. In this respect, you as labs should communicate the OPPENNEXT efforts and provide opportunities for them to meet SMEs.

## Setting your team

Leading an OPPENNEXT journey for an SME, especially the first time, requires specific competences on your Lab OPPENNEXT team. Some of these will be basic, ie.:

- **Project lead** (main contact point for the SME)
- **Community connector** (someone to connect the SME with the Lab community)
- **Technological lead** (someone with a certain degree of technical expertise and knowledge of the industry domain of the SME)

In addition, other competencies that might be needed (based on specific needs from the SME, for instance related to industry-specific needs) will be mapped through the completion of these checklists. The Lab can then in collaboration with the SME see whether additional ad-hoc staffing is necessary and whether candidates for these roles can be found in the community surrounding the Lab or whether someone external should be approached.

Before the outset it is important to have composed the right team for each OPPENNEXT journey.

## How will you learn

As a Lab engaging in OPPENNEXT, it is important to be able to collect learnings and iterate the OPPENNEXT offering based on these learnings in order to continually improve the service and increase the competence level of the OPPENNEXT team.

Lots of new insights, contacts and opportunities will be created, so having a system for how to capture them, take action on them and improve your OPPENNEXT system is very important.

## Prepare for building your visual collaboration journey

This is the last part (of the first part) of your individual checklist as Lab. The next part of the checklist you and the SME will fill out together, but with you as the driving force (as facilitator), see below. One of the activities you will be doing to help you see eye to eye with the SME (align your values, goals and work methods) is a visualisation of your journey together.

You as Lab is responsible for the facilitation of this exercise. You can find a guide in the “Recommended Activity Catalog”. Make sure you have read and orientated yourselves in the catalog guide. You will also need to print the journey map and the Recommended Activities cards, as presented in the guide. Understand each other: SME, meet the Lab. Lab, meet the SME.

You (lab and SME) have both completed the first step towards getting started with OPENNEXT. The previous part set you up to find your right match, and you have found each other – congratulations! Now is the time for the two of you to meet.

This part of the checklist is collaborative, meaning you will go through it together. We want to make sure that you see eye to eye on critical aspects of your budding collaboration.

We suggest you see your answers as a “social contract.” It’s non-binding but it’s important that you understand that from here on out you have an obligation to each other. Answering the questions together ensures that you agree on a few crucial issues. This will make your collaboration go as smooth and problem-free as possible.

# Step 2 of 3

## **Seeing eye to eye**

joint checklist for SMEs and Labs together

## 2 – For SMEs & labs

This is the second part of the checklist that you will fill out together as LAB and SME.

In this part of the survey you will be asked to reflect on the following:

- Understanding OPENNEXT and matching expectations
- Getting familiar with your specific role
- Understanding what open source means
- Getting your leadership on board
- Set your purpose for taking part and Uncover your needs
- Setting your team

## **2 – for both SME and Lab**

### **Matching expectations**

This first part will make sure you have a mutual understanding of what you are going to be doing together. You have already reflected on what OPENNEXT can – and cannot – help you with, and you have also been prepared for peer-to-peer based learning.

By filling in this section you will make sure that you both share the same understanding.

### **Getting familiar with each others needs (SME needs in particular)**

In this section you are going to make sure you are both familiar with each other's needs. It is particularly important that you clearly understand the needs of the SME. First you will go through the needs assessment filled in by the SME to gain understanding, and later you will fill in the checklist to make sure you did not miss any important points.

### **Do you share an understanding of what open source means**

It is not given that there is only one way to understand open source and the implication for how you will be using it. Therefore you will be discussing and determining what degree of openness is possible – in the collaboration, in the SME, and in the community.

### **Setting the right attitude**

Now is the time to set the right attitude. You will determine your common attitudes towards: open source collaboration, community creation and interaction, stepping into uncertainty and “the new”, and radical learning.

## Setting a shared goal

From here on out things are going to get more specific. Now you will be formulating a specific goal for the collaboration between you (Lab and SME).

You should also decide what criteria you will set to determine your success rate, and what is the minimum you want to achieve to consider the outcome a success.

## Work mode, flow, timing

The logistics of how and when you will work should be determined now. In this section you will come to an agreement together by determining when you meet and how often, but also what will take place digitally and what will take place physically.

## Communication (internal)

Set an agreement about communication. You will discuss and agree on issues regarding how you will communicate with each other, what is an appropriate response time, etc.

## Communication (external)

You should also agree on how you will communicate with the world. How will you tell the world about your collaboration, your goal, your learnings?

You should also consider whether there is anything that either of the parties would not like to share with the world.

## Make sure you can finish

Last but not least: Make an agreement with each other, that you are committed to finishing the project. The other participants are dependent on your commitment; don't start if you know you may not finish.

## Exercise

### Build your visual collaboration journey

Now you should be close to seeing eye to eye with each other, and it is time for the last part of your joint checklist activities. In this last activity you are going to create a visual timeline that shows how your collaboration journey will look like. This is to ensure that you have a common idea of what activities and processes you will be going through throughout the journey of realising the project.

With the collaboration journey tool you will customize your collaboration with a collection of activities from which you can mix and match as you like.

Head over to the “Recommended activities catalogue” for further instructions.



# Step 3 of 3

## **Getting off on the right foot**

Individual checklists for SMEs and labs

**3A – For SMEs**

The last part of the checklist you will fill out as SME. The appendix checklist will take you through:

- Budgeting
- Allocating resources
- How will you learn
- What will you do after OPENNEXT?
- Other needs

## 3A – For SMEs

### Budgeting

Before beginning the OPENNEXT journey, it is important to have a budget for dedication of the team's time to ensure there is enough person-hours to go the whole way on the project.

You should also make sure that time is set aside for peer-to-peer support activities that include both giving and receiving support throughout the process.

Additionally, you should have a plan for what to do if a team member leaves: who will step in and how should this situation be handled.

### Allocating resources

Before beginning, you should make sure that you have access to all the right and necessary resources and materials you will need on the journey. This could include, but is not limited to, existing strategy documents, company data, budget numbers, design files, etc.

### How will you learn

During your OPENNEXT journey, lots of new insights, opportunities and contacts will be created, and your ability to capture these and take action on them is in direct proportion to the success you will take away from OPENNEXT.

Before beginning you should have a plan for how you will capture, use, document and take actions on all the new insights you will be creating. Having the plan ready beforehand will prevent important findings from being lost and forgotten.

### What will you do after OPENNEXT?

In this part you will create some reflections on what will happen once the OPENNEXT project is completed.

We recommend that you already now create a plan for finding resources and funding to realize your plans and goals for the outcome of the project – whether it is a new business plan, product development, or something third.

You should also already now reflect on how you will implement your results of the project into your current business.

## Other needs

You might need additional counseling and guidance along the way. This section will make sure you are familiar with all the resources that are available for you and how you can use them.

**3B – For labs**

The last part of the checklist you will fill out as Lab. The appendix checklist will take you through:

- Budgeting
- Allocating resources
- Preparing the community
- Other needs

## 3B – for Labs

### Budgeting

Before beginning the OPENNEXT journey, it is important to have a budget for dedication of the team's time to ensure there is enough person-hours to go the whole way on the project.

Here you should also make sure that time is set aside for peer-to-peer support activities that include both giving and receiving support throughout the process.

Additionally, you should have a plan for what to do if a team member leaves: who will step in and how should this situation be handled.

### Allocating resources

Before beginning, you should make sure that you have access to all the right and necessary resources and materials you will need on the journey. This could include, but is not limited to, existing strategy documents, company data, budget numbers, design files, etc.

### Preparing the community

Now that you are all set, it is finally time to start engaging your community and presenting them with the exciting new opportunity. This section will remind you to confirm with the community that an interesting SME will join the lab.

You should also consider whether there are key figures in the community that can be connected to the SME for welcoming them and creating a good start for the SME.

### Other needs

Do you have other needs that have not been addressed in this checklist?

If you need further counselling or have unanswered questions, contact one of the OPENNEXT partners.

# Appendix B

SMEs and Makerspaces

**Primer checklists**

—

*Will also be available as digital surveys*

# Step 1 of 3

## **Finding The Right Match**

Individual checklists for SMEs and labs



**1A – For SMEs**

This is the first part of the checklist that you will fill out as SME, before you meet up with the lab you will be collaborating with. On the following pages we will briefly take you through the questions you will be answering and reflecting on in the first part of the appendix survey:

- Understanding OPENNEXT and matching expectations
- Getting familiar with your specific role
- Understanding what open source means
- Getting your leadership on board
- Set your purpose for taking part and Uncover your needs
- Setting your team

# 1A – for SMEs

## Understanding OPENNEXT & matching expectations

Do you feel you have an understanding of what OPENNEXT can help you with? Please describe your expectations:

---

---

---

---

---

Do you feel that you truly understand how OPENNEXT is based on peer-to-peer learning, which requires you to “give and take”? For example that you commit to activities such as:

- absorbing knowledge and insights from an informal community of stakeholders, who have an interest in your company and product.
- sharing your learnings with other members in such a community.
- spending some time communicating with such a community, to keep them informed on an ongoing basis.
- attending (or hosting) events with this community.
- sparring with other SMEs and learning from them – but also letting them learn from you.

[ ] **YES, I feel comfortable with that**

[ ] **NO, I would actually like to know more about how this works**  
(ask the lab to elaborate)

If you answered 'yes' above, please describe how you understand the concept of peer-to-peer learning and participating in the culture of "give and take":

---

---

---

---

---

## Getting familiar with your specific role

Do you feel you understand what your ideal behaviour should be as SME in OPENNEXT?

☐ YES, I feel comfortable with that

☐ NO, I would actually like to know more about how this works  
(ask the lab to elaborate)

If you answered 'yes' above, please describe this behaviour as SME-partner:

---

---

---

---

---

Could you please describe your expectations from the Lab in the collaboration?

---

---

---

---

---

## Understanding what open source means

Please start out by spending 30-60 mins familiarizing yourself with the concept of open source using this resource

<https://danskdesigncenter.dk/en/understand-open-source-manufacturing-30-minutes>

Do you now feel familiar with the basics of open source, as well as comfortable with potentially applying these principles in your business? For instance, that:

- it involves adding an open licence to an asset in order to allow anyone to reuse and modify the asset, as well as make derivative assets, also for commercial purposes.
- it involves building a community of active re-users / co-creators who devote their time to help develop the asset.
- it builds on a principle of mutual benefit for both the original designer of the asset, as well as for the community of co-creators.
- it can potentially accelerate your innovation pace if scaled successfully.

[ ] **YES, I feel comfortable with that**

[ ] **NO, I would actually like to know more about how this works**  
(ask the lab to elaborate)

**OR**

Would you rather explain your understanding of open source in your own words?

---

---

---

---

---

Do you feel that you understand the concept and implications of applying open source principles to hardware? (that there is a difference between open sourcing digital assets like software and physical assets like hardware)

☐ YES, I feel I understand that.

☐ NO, I would actually like to know more about how this works  
(ask the lab to elaborate)

Please reflect on how you see open source having a business development potential for your particular company:

---

---

---

---

---

## Getting your leadership on board

Have you defined roles and responsibilities of one or more leaders/ decision makers in your company in relation to your engagement with the OPENNEXT project? (ie. supervision, active participation, etc.)

☐ Yes

☐ Not yet

If yes, what roles belong to whom at this point:

---

---

---

---

---

**If 'not yet', which roles still lack leadership/decision involvement?**

---

---

---

---

---

**If no, you can reflect and define what leadership roles need to be filled:**

---

---

---

---

---

**Do you have a plan for making sure this lack gets addressed?:**

---

---

---

---

---

**Are there any gaps in between the sign-off from top management/decision makers you have for OPENNEXT, and what you ideally wanted?**

---

---

---

---

---

If yes, how will you make sure these are addressed?

Set your purpose for taking part and uncover your needs

Please go directly to the Impact Assessment survey (OPENNEXT T4.5) and fill it out, before returning to this Checklist document and continue below.

Please describe your purpose for taking part in OPENNEXT:

Please describe your needs for taking part in OPENNEXT:

## Setting your team

Note down who is on your team, their titles and what you expect their responsibilities in OPENNEXT to be:

---

---

---

---

---

---

---

---

---

---

Are you confused about what roles will be needed to set the ideal OPENNEXT team for your project?

- ☐ No, I feel confident in the team I have set.
- ☐ Yes, I would like some support in setting the right team  
(ask the lab)

Do you have any positions on your OPENNEXT team that still need to be filled?

---

---

---

---

---



**Note down a plan for filling remaining team positions:**

**1B – For labs**

This is the first part of the checklist that you will fill out as LAB, before you meet up with the SME you will be collaborating with. On the following pages we will briefly take you through the questions you will be answering and reflecting on in the first part of the appendix survey:

- Understanding OPENNEXT and matching expectations
- Getting familiar with your role
- Understanding what open source means
- Getting familiar with the OPENNEXT resources
- Facilities
- Preparing your community
- Setting your team
- How will you learn
- Preparing your visual collaboration journey

# 1B – for Labs

## Understanding OPENNEXT & matching expectations

Do you feel you have an understanding of what OPENNEXT can help you with? Please describe your expectations:

---

---

---

---

---

Do you feel that you truly understand how OPENNEXT is based on peer-to-peer learning, which requires you to “give and take”? For example that you commit to activities such as:

- absorbing knowledge and insights from an informal community of stakeholders, who have an interest in your company and product.
- sharing your learnings with other members in such a community.
- spending some time communicating with such a community, to keep them informed on an ongoing basis.
- attending (or hosting) events with this community.
- sparring with other SMEs and learning from them - but also letting them learn from you.

[ ] **YES, I feel comfortable with that**

[ ] **NO, I would actually like to know more about how this works**  
(ask the lab to elaborate)

If you answered 'yes' above, please describe how you understand the concept of peer-to-peer learning and participating in the culture of "give and take":

---

---

---

---

---

## Getting familiar with your role

Do you feel you understand what your role will be and what the ideal behaviour would be as Lab in OPENNEXT?

☐ YES, I feel I understand that.

☐ NO, I would actually like to know more about this role

(please consult the OPENNEXT consortium)

If you answered 'yes' above, please describe this behaviour as Lab-partner:

---

---

---

---

---

## Understanding what open source means

Please start out by spending 30-60 mins familiarizing yourself with the concept of open source using this resource:

<https://danskdesigncenter.dk/en/understand-open-source-manufacturing-30-minutes>

**Do you now feel familiar with the basics of open source, as well as comfortable with potentially applying these principles in your business? For instance, that:**

- it involves adding an open licence to an asset in order to allow anyone to reuse and modify the asset, as well as make derivative assets, also for commercial purposes.
- it involves building a community of active re-users / co-creators who devote their time to help develop the asset.
- it builds on a principle of mutual benefit for both the original designer of the asset, as well as for the community of co-creators.
- it can potentially accelerate your innovation pace if scaled successfully.

**[ ] YES, I feel comfortable with that**

**[ ] NO, I would actually like to know more about how this works**  
(please consult the OPENNEXT consortium)

**OR**

**Would you rather explain your understanding of open source in your own words?**

---

---

---

---

---

**Please describe how open source principles are being practiced in your Lab?**

---

---

---

---

---

---

---

---

---

---

## **Getting familiar with the OPENNEXT resources**

**Before completing this section, please familiarize yourself with the OPENNEXT materials by studying this document including the Main Guide, this Checklist and the Recommended Activities Catalogue.**

**Do you feel you understand how to use the Recommended Activities Catalogue?**

- ☐ **YES, I feel I understand that.**
- ☐ **NO, I would like to know more about how this works**  
(please consult the OPENNEXT consortium)

**Do you feel you understand how to use the Collaboration Journey Tool?**

- ☐ **YES, I feel I understand that.**
- ☐ **NO, I would like to know more about how this works**  
(please consult the OPENNEXT consortium)

**Do you feel you understand how to use this Checklist in collaboration with the SME in order to align with other?**

- ☐ **YES, I feel I understand that.**
- ☐ **NO, I would like to know more about how this works**  
(please consult the OPENNEXT consortium)

**Do you feel capable of taking the facilitating role in an OPENNEXT collaboration with an SME, as outlined in the materials mentioned above? (in particular the activities listed in the Recommend Activities Catalogue**

- ☐ **YES, we feel capable of facilitating all the above mentioned activities**
- ☐ **NO, I would like to know more about how this works**  
(please consult the OPENNEXT consortium)

**If not, what activities will you currently not be able to facilitate and why?**

-----

-----

-----

-----

-----

**Please outline ideas to resolve this issue, ie. learn new skills, bring other competencies on board your OPENNEXT team, etc.**

-----

-----

-----

-----

-----

## Facilities

What essential facilities and resources do you currently have that will be of specific use in the OPENNEXT collaboration? (ie. digital fabrication tools, competencies among community members, etc.)

- [ ] 1: -----
- [ ] 2: -----
- [ ] 3: -----
- [ ] 4: -----
- [ ] 5: -----
- [ ] 6: -----

Do you currently have ideas for how to gain access to any facilities that you feel is missing?

-----

-----

-----

-----

-----

What nice-to-have facilities and resources do you currently have that might be of use in the OPENNEXT collaboration?

- [ ] 1: -----
- [ ] 2: -----
- [ ] 3: -----
- [ ] 4: -----
- [ ] 5: -----
- [ ] 6: -----



What additional nice-to-have facilities do you hope to add during the OPENNEXT collaboration?

-----

-----

-----

-----

-----

Preparing your community

Is your Lab community (members, makers, etc.) currently aware of the opportunity to take part in the upcoming OPENNEXT collaborations with SMEs?

- [ ] YES, our community have been informed and are aware
- [ ] YES, they have been informed, but how aware they are is currently unclear
- [ ] NO, we have not yet informed our community

If ‘yes, informed but maybe not aware’ or ‘no’, please outline how you plan to better inform your community:

-----

-----

-----

-----

-----

Who will have responsibility to take these community outreach actions, and what is the deadline?

-----

-----

-----

-----

-----

## Setting your team

Who will be project lead (main contact point for the SME)

---

---

Who will be the Community connector (someone to connect the SME with the Lab community)

---

---

Who will be technological lead (someone with a certain degree of technical expertise and knowledge of the industry domain of the SME)

---

---

Identify possible additions to your team that you would like to find, if possible.

---

---

---

---

---

## **Prepare for building visual collaboration journey**

- [ ] Please read the Recommended Activities Catalog materials.**
- [ ] Print the Collaboration Journey canvas and Recommended Activity cards as instructed in the activities catalogue**
- [ ] Make sure this is done before you meet the SME for the next part (part 2) of the checklist.**

# Step 2 of 3

## **Seeing eye to eye**

joint checklist for SMEs and Labs together

## 2 – For SMEs & labs

This is the second part of the checklist that you will fill out together as LAB and SME.

In this part of the survey you will be asked to reflect on the following:

- Understanding OPENNEXT and matching expectations
- Getting familiar with your specific role
- Understanding what open source means
- Getting your leadership on board
- Set your purpose for taking part and Uncover your needs
- Setting your team

## 2 – For SMEs and Labs

**Understand each other: SME, meet the Lab.  
Lab, meet the SME.**

Lab and SME, we suggest you make an agreement with each other: Do you agree that the terms you will agree upon while filling out this survey is to be seen as a “social contract” that ensures that you both commit fully to the collaboration?

☐ Lab: YES!

☐ SME: YES!

### Matching expectations

To begin with, a good starting point is to share your expectations from the previous chapter of the survey with each other. Do you feel you understand the expectations you each have for each other?

☐ Lab: YES!

☐ SME: YES!

Do you see any mis-alignments in expectations that you are concerned about?

☐ No, we have no major disagreements so far

☐ Yes, we have some mis-alignments of expectations

If yes, write them down to discuss how you will go about dealing with them together:

---

---

---

---

Do you see any mis-alignments in expectations that you are concerned about?

-----

-----

-----

-----

-----

Getting familiar with each others needs;  
SME needs in particular

Does the SME have specific needs that need to be taken into consideration? For instance relating to their specific industry, confidentiality issues, company culture, etc.

Now is a good time to discuss them - and note them down below:

-----

-----

-----

-----

-----

How will you together make sure that the needs of SME are met?

-----

-----

-----

-----

-----

Also, note down if Lab has any special needs or circumstance that needs attention from both parties:

---

---

---

---

---

How will you together make sure that the needs of the LAB are met?

---

---

---

---

---

## Do you share an understanding of what open source means?

Please share your responses from earlier one (sections 1a and 1b) to make sure you both correctly understand what open source truly means. It is a somewhat complicated concept, so it might not be the same for both of you as you enter OPENNEXT.

Now is the perfect time to help each other correct misunderstandings and fill in gaps, if any exist. After discussing, please confirm:

☐ Yes, we share the same understanding of open source

Please do the same for your common understanding of open source hardware:

☐ Yes, we share the same understanding of open source hardware



**Please reflect together: How will the open source approach influence how you collaborate?**

**Please reflect together: How will the open source approach influence how you interact with a community?**

## Setting the right attitude

Please formulate a short manifesto, which describes how you will strive to keep an open mind towards going outside your comfort zone together:

## Setting a shared goal

Please share your defined individual goals for joining OPENNEXT, from earlier (section 1a and 1b). To create a shared direction and purpose together, we recommend that you become closely aware of each other goals, and then discuss and note down at least 3 shared goals:

How will you measure your success? To keep track of the progress you are making, you can note down 3 or more KPI's for each goal, to make sure your common progress is measurable (make them "SMART"; google this if you are unfamiliar with this term):

Work mode, flow, timing

We recommend making an agreement of when you meet and how often. You can write it down here:

Do you have a clear idea at this point of what type of activities that will take place physically?

Do you have a clear idea at this point of what type of activities that will take place virtually?:

---

---

---

---

---

## Communication (internal)

What will be your main modes of communication?

- ☐ E-mail
- ☐ Chat software, ie. Slack or similar
- ☐ Versioning software, ie. Github or similar
- ☐ Telephone
- ☐ Project management software, ie. Sharepoint, Trello, Wrike, etc.

Other modes of internal communication you choose to use:

---

---

---

---

---

We recommend that you make an agreement on expectations around response time:

---

---

---

---

---

# Communication (external)

Talk about your existing external communication strategies and practices, and try to answer as many of these questions as possible.

How will you communicate with the outside world?

What goals, plans and expectations for the project will you share publicly? And when?

What kinds of finding and learnings will you share publicly? And when?

What kinds of findings and learnings will you not share publicly? Why not?

-----

-----

-----

-----

Who will be responsible for sharing what publicly?

Lab communication role:

-----

-----

-----

-----

-----

SME communication role:

-----

-----

-----

-----

-----

How will you make sure you keep up external communication?

-----

-----

-----

-----

-----

## **Make sure you can finish**

**SME, do you accept the commitment to engage in the full duration of collaboration?**

**[ ] YES we do**

**Lab, do you accept the commitment to engage in the full duration of collaboration?**

**[ ] YES we do**

## **Building your visual collaboration journey**

**Please find the Recommended Activities Catalog materials and complete a Collaboration Journey together. Make sure to document the end product by taking a photo (and/or keeping the canvas).**

**[ ] YES, we have completed the user journey successfully!**

# Step 3 of 3

## **Getting off on the right foot**

Individual checklists for SMEs and labs



**3A – For SMEs**

The last part of the checklist you will fill out as SME. The appendix checklist will take you through:

- Budgeting
- Allocating resources
- How will you learn
- What will you do after OPENNEXT?
- Other needs

# 3A – for SMEs

## Budgeting

Please outline your budget (person hours, production budget, marketing, etc.).

(Feel free to set it up in a separate document instead of here).

How will you distribute peer-to-peer support hours?

How will you handle it if a key person leaves the project before completion?

**Describe a mitigation strategy to find a stand-in or decide who will take over the different responsibilities of your team:**

**Allocating resources**

**Note down the resources you will need:**

**If you are missing some (ie. particular competencies, materials, etc.), note them down:**

**Set a deadline and plan for acquiring the missing resources:**

## How will you learn

Do you have an expectation of what you will be learning? It might be beneficial for you to note it down to clarify:

---

---

---

---

---

Same goes for how you will capture and document these learnings and findings. Some examples of how you can capture and document could be:

- ☐ Assigning one person from the team to be responsible
- ☐ Creating an online collaboration platform that captures interaction in real time
- ☐ Dividing documentation responsibilities among the whole team

If you have other methods (or plans) for documenting your learning, please write them down here to clarify them amongst you:

---

---

---

---

---

Another issue is converting these learnings and findings into improvements or your practice. It can be a good idea to reflect on how you will do this, so you get as much benefit from OPENNEXT as possible. How will you take action on your learnings and findings?

- ☐ Setup learning sessions for the Lab and/or community based on your experiences.
- ☐ Publicizing your learnings in writing or audiovisual communication (video, podcast, etc.)
- ☐ Setup internal sessions to reflect on and iterate your work
- ☐ Convert your learnings into skill sharing sessions.

## What will you do after OPENNEXT?

Have you thought about what you will do after OPENNEXT is completed?

- ☐ YES, we have.
- ☐ NO, we have not given this much thought and consideration yet.

If yes, what do you imagine will happen after OPENNEXT is completed?

---

---

---

---

---

Do you foresee any challenges that might show up after the completion of OPENNEXT?

---

---

---

---

---

How might you work through these challenges?

How do you imagine you will keep using what you have learned after the program is completed?

Other needs

If you have any needs or unanswered questions, please consult the Lab or OPENNEXT consortium to address these.

**3B – For labs**

The last part of the checklist you will fill out as Lab. The appendix checklist will take you through:

- Budgeting
- Allocating resources
- Preparing the community
- Other needs

# 3B – for Labs

## Budgeting

Please outline your budget (person hours, production budget, marketing, etc.).

(Feel free to set it up in a separate document instead of here).

How will you distribute peer-to-peer support hours?

How will you handle it if a key person leaves the project before completion?



**Describe a mitigation strategy to find a stand-in or decide who will take over the different responsibilities of your team:**

---

---

---

---

---

## **Allocating resources**

**Note down the resources you will need:**

---

---

---

---

---

**If you are missing some (ie. particular competencies, materials, etc.), note them down:**

---

---

---

---

---

**Set a deadline and plan for acquiring the missing resources:**

---

---

---

---

---

## How will you learn

Do you have an expectation of what you will be learning? It might be beneficial for you to note it down to clarify:

---

---

---

---

---

Same goes for how you will capture and document these learnings and findings. Some examples of how you can capture and document could be:

- ☐ Assigning one person from the team to be responsible
- ☐ Creating an online collaboration platform that captures interaction in real time
- ☐ Dividing documentation responsibilities among the whole team

If you have other methods (or plans) for documenting your learning, please write them down here to clarify them amongst you:

---

---

---

---

---

Another issue is converting these learnings and findings into improvements or your practice. It can be a good idea to reflect on how you will do this, so you get as much benefit from OPENNEXT as possible. How will you take action on your learnings and findings?

- [ ] Setup learning sessions for the Lab and/or community based on your experiences.
- [ ] Publicizing your learnings in writing or audiovisual communication (video, podcast, etc.)
- [ ] Setup internal sessions to reflect on and iterate your work
- [ ] Convert your learnings into skill sharing sessions.

If you have other methods or plans to do so, please write them down here:

---

---

---

---

---

## Other needs

If you have any needs or unanswered questions, please consult the OPENNEXT consortium to address these.

# Appendix C

Catalog

**Recommended activities**



# Catalog

## **Recommended activities**

Suggestions from companies and labs on how to have a fruitful OpenNext experience

# Introduction

The Recommended Activities Catalog is a resource for SMEs and Labs engaging in an OPENNEXT collaboration can use to sketch out their shared journey. It is intended as a visual and tactile tool that outlines activities over the duration of the collaboration, and precedes more detailed planning to made using the iPeM model (D5.1).

The Recommended Activities Catalog will continue to expand as the pilot and demonstrators will unfold and is meant to be a “living document” that continues to develop as expertise in the OPENNEXT consortium (and beyond the project) grows from experience.

The activities in the Recommend Activities Catalog were conceptualized through a series of 12 hands-on, on-location workshops for the OPENNEXT pilot SMEs, facilitated by the the participating OPENNEXT Labs, in which they crafted specific user journeys for the 6 SME pilots, during two rounds of iteration. All the suggested activities were then pooled into a draft catalog, iterated and homogenized.

It is important to note that the current selection of activities represent a point of departure, and that the selection will continue to expand as OPENNEXT progresses. Any Lab can add to the catalog, which will be organized centrally and digitally (as a wiki or similar open source, public-facing web interface that allows multiple contributors).

# How to use

The Lab, as facilitator, prints the catalog and cuts out the Recommended Activities pieces as well as the user journey canvas.

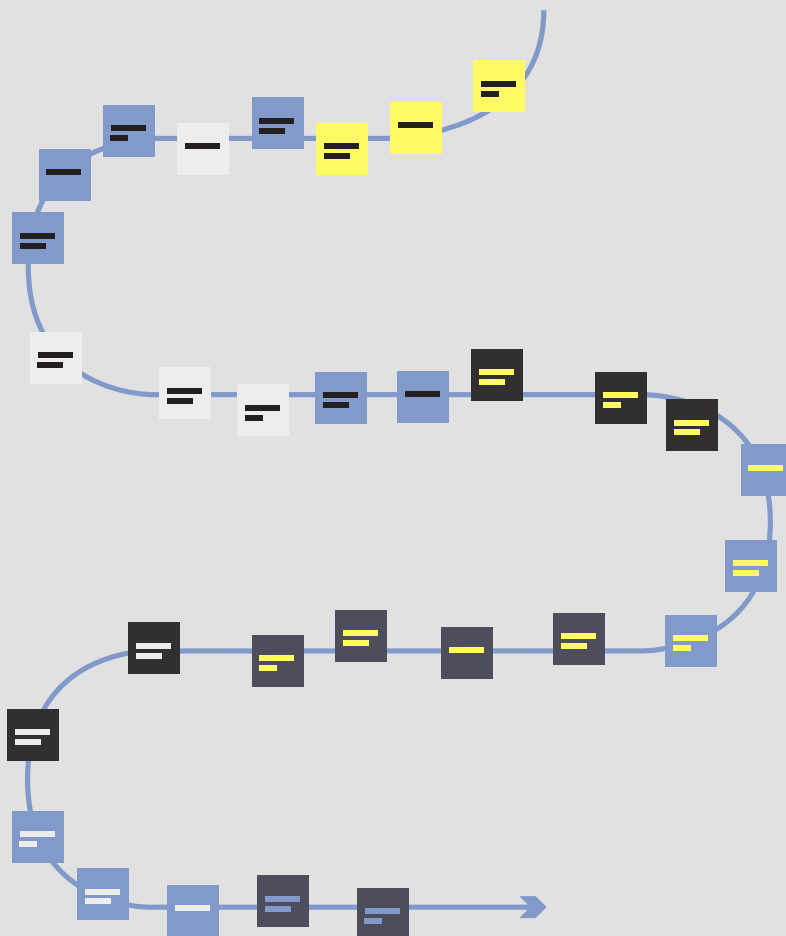
The Lab and the SME then meet for a joint brainstorm to imagine the journey by selecting which Recommended Activities they see useful to do together and placing them on the user journey canvas to illustrate a chronological order of the activities.

The outcome is a fully visualized user journey for the collaboration, which can (and most likely will) be iterated and changed as the collaboration progresses, and in particular as the user journey is transferred and streamlined into the iPeM model as one of the following steps.

## OPENNEXT Journey

SME

Lab





# Chapters

1. Getting ready to begin
2. Understanding each other
3. Understanding the context
4. Developing a concept
5. Framing the collaboration
6. Learning and validating
7. Building a community
8. Creating a prototype
9. Setting up production
10. Launching to public
11. Analysing and evaluating

# Getting ready to begin

# 01

It is a given that before starting the project it is important to know what it is all about. In this first chapter, you can choose a number of activities that help gain a basic understanding of the main components of the OPENNEXT project: What is open source production? What is community driven innovation? This is especially helpful if some participants are not yet familiar with these concepts. Gaining a basic understanding for the whole team is a helpful way to ensure that everyone sets out from the same place. Other activities that might be taken up in the very beginning, could be reaching out to collaborators and existing communities, to create awareness of the upcoming possibility and spike an interest for potential partnerships or participation.

These activities are priming activities that all makes sense to do before the partnership takes tangible form.

## Activities recommended by SMEs and labs

Getting ready to begin

Reach out to potential collaborators

Getting ready to begin

Learn about community driven innovation

Getting ready to begin

Get introduced to open source

Getting ready to begin

Reach out to existing communities

Getting ready to begin

Connect with existing ideas in the community

+

See more suggestions from leading experts and researchers in the IPeM

Understanding each other

02

Before starting out, take time to understand and empathize with each other - It is crucial for a successful collaborative process. What does the other (LAB/SME) do, what are your goals? Expectations? Hopes? And so on. Understanding each other can mean to define and clarify shared goals, but it can also mean to discover parts where your views might differ. By taking time to understand each other, you may be preventing future misunderstandings and confusion.

Activities recommended by SMEs and labs

Understanding each other

Clarify incentives for collaboration

Understanding each other

Define shared values

Understanding each other

Define the focus of the project/ collaboration

Understanding each other

Learn about each other by conducting interviews

Understanding each other

Go on field trips and visit each other

+

See more suggestions from leading experts and researchers in the IPeM

# Understanding the context

03

Understanding the context of what you are working with can be a helpful, sometimes crucial, way of ensuring that you are on the right path, or about to set out in the right direction. The context will vary according to what you are going to be producing within your specific collaboration. How you want to gain your understanding of your specific context might also vary from project to project, but in most projects it is often done early in the process.

## Activities recommended by SMEs and labs

Understanding the context

Conduct research  
with a focus group

+  
See more suggestions  
from leading experts and  
researchers in the **IPeM**

# Developing a concept

04

The development of a business concept has several phases. According to the specific level of business knowledge and experience within your SME/LAB collaboration, developing a business concept can range from learning about business concepts and models, to brainstorming and developing business ideas.

## Activities recommended by SMEs and labs

<div>Developing a concept</div> <div>Learn about business models</div>	<div>Developing a concept</div> <div>Research other cases</div>	<div>Developing a concept</div> <div>Outline an open business model</div>
<div>Developing a concept</div> <div>Brainstorm on potential cases</div>	<div>Developing a concept</div> <div>Host an open brainstorming session</div>	<div>+ See more suggestions from leading experts and researchers in the IPeM</div>

# Framing the collaboration

05

Framing the collaboration means making agreements about the technical and concrete ins and outs of the project and your collaboration. These are agreements on matters such as processes, tools, KPIs, skills, and responsibilities that define key parameters of how the collaboration and project will work.

Often, framing a collaboration is important, because it ensures that specific needs and wishes of both parties won't be missed, but rather be taken into consideration and planned for., increasing the chances of a successful collaboration process and final outcome.

Activities recommended by SMEs and labs

<div>Framing the collaboration</div> <div>Set the scope of the collaboration</div>	<div>Framing the collaboration</div> <div>Decide what tools you will be using</div>	<div>Framing the collaboration</div> <div>Plan how you will produce documentation</div>
<div>Framing the collaboration</div> <div>Align your goals and KPI's for the project</div>	<div>Framing the collaboration</div> <div>Idenify relevant skills needed to complete the project</div>	<div>Framing the collaboration</div> <div>Make a budget for expenses</div>

# Framing the collaboration

# 05

Framing the collaboration

**Decide on the methodology you will apply**

Framing the collaboration

**Define your individual roles in the partnership**

Framing the collaboration

**Create a roadmap for your collaboration**

Framing the collaboration

**Set up rules to frame your collaboration**

Framing the collaboration

**write a design manifesto**

Framing the collaboration

**Learn about how to use open source licenses**

Framing the collaboration

**Align strategies**

Framing the collaboration

**Discuss and define how society can benefit from the project**

Framing the collaboration

**Create a sustainability strategy**

# Learning and validating

06

Gaining knowledge and learning new things is a big part of the OPEN-NEXT project, and it will be a big part of your process too. Things you have planned for might not go or work as planned, and the things you have decided upon might benefit from being rethought. Validating your knowledge is a way of making sure you are on the right track. When and how you go about knowledge validation might vary from project to project, but is often universally recommended.

## Activities recommended by SMEs and labs

Learning and validating

**Plan a series of  
'reality checks'**

+

See more suggestions from leading experts and researchers in the **IPeM**



# Building a project community 07

Creating and building a great community around your project is of utmost importance. The art of community building requires several skills: from strategies of attracting, approaching, and recruiting members, to matchmaking, scaling and maintaining your community. The positions and means of LAB and SME to interact with the community are different, but should both be utilised.

## Activities recommended by SMEs and labs

Building a project community

**Learn the basics of community building**

Building a project community

**Recruit the right people for your community**

Building a project community

**Learn how to maintain a healthy community**

Building a project community

**Learn how to involve users in your project**

Building a project community

**Learn about way to give back to your community**

Building a project community

**Create a call for action**

# Building a project community 07

Building a project community

Create matchmaking  
between makers and  
your project

Building a project community

Approach an  
existing community

Building a project community

Learn methods  
to scale your  
community

Building a project community

Host a hackathon to  
engage community  
members

+

See more suggestions  
from leading experts and  
researchers in the **IPeM**

# Creating a prototype

08

Prototypes are a key feature in your process. They are great because they let you test your ideas and allow you to iterate the things that do not work before creating your final production plan. Creating a prototype can mean various different things to different types of projects. That means prototypes can look vastly different according to your specific project. The implications of creating a prototype ranges from understanding your material, understanding how to use facilities, learning how to design your prototype, to testing and learning how to use it to perfect your final mode of production.

## Activities recommended by SMEs and labs

Creating a prototype

**Learn about design and prototyping with a design course**

Creating a prototype

**Get introduction to the basics of digital fabrication**

Creating a prototype

**Source materials for your prototype**

Creating a prototype

**Document the prototyping and production process**

Creating a prototype

**Iterate your work for edits and improvements**

Creating a prototype

**Build a mock-up of your prototype**

# Creating a prototype

# 08

Creating a prototype

**Build your  
prototype**

Creating a prototype

**Test your prototype  
with users**

Creating a prototype

**Conduct an  
acceptance test**

+

See more suggestions  
from leading experts and  
researchers in the **IPeM**

# Producing a product

09

The first step towards getting a final product out there is to produce it. Learning how to set up production — especially distributed production — is important if you want to fully harness the power of community driven innovation.

## Activities recommended by SMEs and labs

Producing a product

**Learn how to setup  
co-manufacturing  
production**

Producing a product

**Test with a  
pre-production  
prototype**

Producing a product

**Learn how to design  
for production**

+

See more suggestions  
from leading experts and  
researchers in the **IPeM**

# Launching to public

# 10

Launching is an important step in the process that should be paid careful attention to, as you will now experience your hard work and efforts come to life. One thing is getting the product out there, another thing is making sure all documentation and supporting materials are ready.

## Activities recommended by SMEs and labs

Launching to public

**Create a plan for implementing your product**

Launching to public

**Learn how to successfully fundraise**

Launching to public

**Prepare documentation for launch**

+

See more suggestions from leading experts and researchers in the **IPeM**

# Analysing and evaluating

# 11

Evaluating the outcome and processes of your project is an important way to ensure that you will keep benefitting from the hard work you have put into this project. Analysis and evaluation does not only make sense at the end of the journey, but can be conducted throughout the process to ensure that you keep up your standards and that everything is running as it should be. Evaluation and analysis throughout the process allows you to iterate, upgrade, or come up with new and better solutions to things that are not going well or could be going better. Essentially, analysis and evaluation is crucial in optimizing the value of the product you are creating and the processes you have designed and work under.

## Activities recommended by SMEs and labs

Analysing and evaluating

**Evaluate your business plan**

Analysing and evaluating

**Have a goodbye session before you finalise the collaboration**

Analysing and evaluating

**Learn how to continually evaluate the health of your community**

Analysing and evaluating

**Evaluate the quality of your contribution to community**

+

See more suggestions from leading experts and researchers in the IPeM

# Next step

## Transferring the user journey into the iPeM model

Once the user journey exercise using the Recommended Activity Catalog has been completed, the Lab and SME will move on to using the iPeM model (D5.2) to structure the collaboration and set the timeline firmly.

There recommended activities in this catalog will be updated to follow the same categories as the IPeM model.



# Appendix D

Poster

Collaboration journey exercise

