SAge-Hub

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#13Instrument

Good Practices for Co-Creation

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01 What is co-creation

Co-creation is a **collaborative approach to innovation** in which multiple stakeholders — especially **end users** — actively participate throughout the **entire development process of solutions**. Rather than being passive recipients, users become **partners in the creation of products, services, systems, or policies**.

Co-creation involves participants in all stages of the process, including:

- Identifying problems
- Generating ideas
- Designing solutions
- Testing and improving outcomes

It is therefore a **continuous, collaborative and iterative process** of designing, developing, testing, and refining solutions in **real-life contexts**.

Unlike traditional innovation models, co-creation recognizes that valuable knowledge is distributed across society and not limited to experts or institutions. Users' experiences, practices, and everyday contexts are essential sources of innovation and contribute significantly to more meaningful and applicable solutions.

Co-creation is based on several key **elements**:

- **Active user participation:** Users contribute with their experiences, needs, and ideas throughout the process.
- **Multi-stakeholder collaboration:** Different actors are involved, such as academia, the public sector, private organizations, and civil society.
- **Continuous interaction:** The process is iterative and based on ongoing feedback and refinement.
- **Joint value creation:** Value emerges from the interaction between stakeholders, not only from the final outcome.
- **Real-life context:** Solutions are developed and tested in real environments, as commonly seen in Living Labs.

02 Importance of co-creation

Co-creation plays a key role in enhancing the effectiveness and relevance of innovation processes.

By actively involving users and stakeholders, co-creation contributes to:

- **User-centered solutions:** Based on real needs rather than assumptions, ensuring that solutions reflect users' actual experiences and contexts
- **Developing more relevant and inclusive solutions:** Solutions are better aligned with real needs and diverse perspectives.
- **Higher quality outcomes:** Achieved through the integration of multiple perspectives, leading to more robust and effective solutions
- **Reducing the risk of failure:** Early feedback allows for the identification and correction of issues throughout the process.
- **Faster innovation processes:** Continuous feedback and iteration allow quicker refinement and development of solutions
- **Increasing user acceptance and adoption:** When users are involved, they are more likely to trust, use, and support the final solution.
- **Promoting social innovation and sustainability:** Co-creation encourages solutions that are socially responsible and context sensitive.
- **Strengthening the legitimacy of decisions:** Particularly in public sector contexts, involving citizens increases transparency and trust in decision-making processes.

Overall, co-creation enables a more democratic, inclusive, and effective approach to innovation, ensuring that solutions are not only technically viable but also socially meaningful and widely accepted.

03 Co-creation in a living lab

Co-creation and Living Labs are closely related, but not equivalent. Co-creation refers to a **collaborative approach to innovation**, while a Living Lab is the **context in which this approach is implemented.**

Living Labs are open innovation ecosystems where users, researchers, companies, and public authorities work together to develop, test, and validate solutions in real-world settings.

In Living Labs, co-creation is a **core principle** and is present throughout the entire process. It typically involves:

- Collaborative workshops
- Co-design and prototyping activities
- Testing solutions in real-life environments
- Iterative cycles of experimentation and learning
- Continuous stakeholder involvement

A key characteristic of Living Labs is the combination of co-creation with real-life experimentation, ensuring that solutions are both relevant and applicable in practice.

Example:
A solution developed in a Living Lab is co-designed and tested with users in real-life conditions, leading to higher usability and acceptance compared to traditional top-down approaches.

03.1 Good Practices

- Ensure early and continuous **user involvement**
- Promote **diversity and inclusion** of participants
- Use **clear and accessible communication**
- **Combine different methods** (qualitative and quantitative)
- Test solutions in **real-life contexts** whenever possible
- Maintain **transparency** throughout the process
- **Document** all phases and decisions
- Foster **continuous feedback and iteration**

03.2 Common Challenges and Risks

- Difficulty in **engaging and retaining** participants
- **Unbalanced participation** between stakeholders
- **Conflicts of interest** among actors
- **Lack of clear facilitation or structure**
- **Limited resources** (time, budget, tools)
- Challenges in **managing and analysing data**

04 Methodology

The methodology of co-creation in a living lab consists of a structured yet flexible set of practices and participatory methods that enable the active involvement of stakeholders — particularly end users — throughout the entire innovation process.

Rather than a single fixed method, co-creation is an adaptable approach that can be applied to different contexts, such as Living Labs, and combines elements of participatory design, qualitative research, and real-life experimentation.

This methodology is generally characterized by:

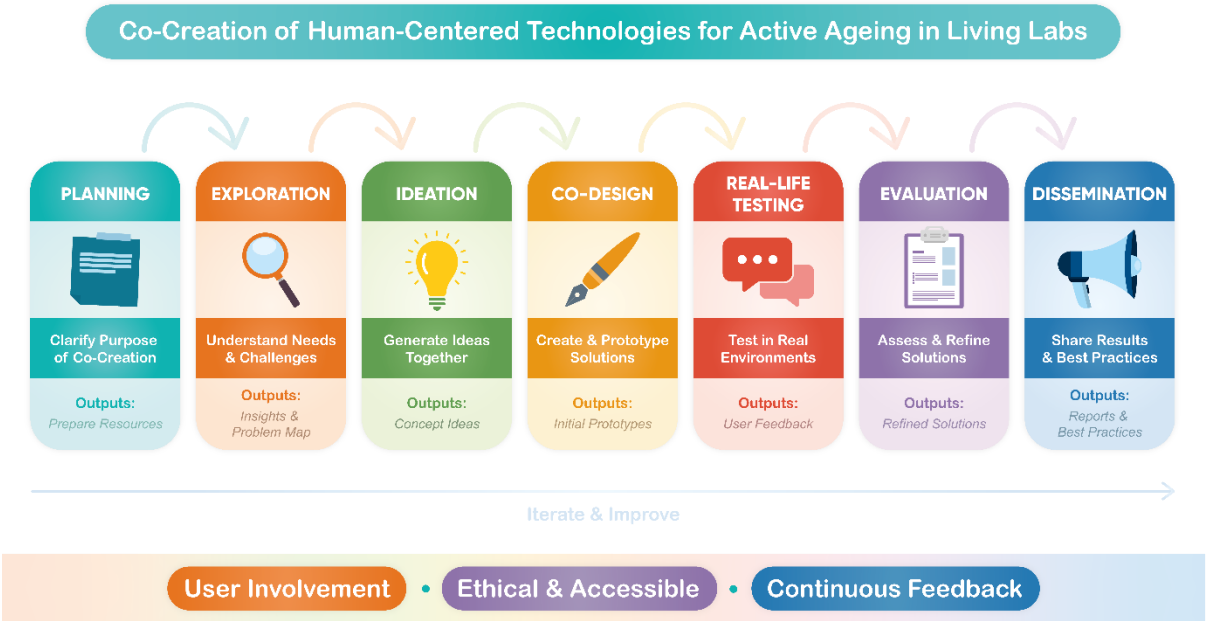
- **Iterative processes:** Activities are organized in cycles, allowing continuous feedback and improvement.
- **Active participation:** Stakeholders are directly involved in decision-making and solution development.
- **Exploration and experimentation:** Ideas are tested and refined through practical activities.
- **Context-based approach:** Solutions are developed and validated in real-life environments.

05 Methodology Phases

Co-creation in a living lab is a structured yet flexible process that unfolds through a series of interconnected phases. These phases guide the development of solutions from initial planning to final dissemination, ensuring continuous involvement throughout the process.

Rather than being linear, it is **iterative**. This means that insights gained in later stages can lead to adjustments and improvements in earlier phases.

The following diagram illustrates the main phases of the process. Each phase is described in detail below, including its objectives, common methods, and practical examples.



Co-creation phases:

1. Planning

Objective:

Define the purpose and scope of the co-creation process and establish clear success indicators.

Suggested Methods:

- Identity stakeholders/end users: main beneficiaries or users of the solution
- Internal planning meetings
- Resource preparation

Expected Outputs:

- Defined objectives
- Identified stakeholders/end users
- Prepared resources

Recommendations:

- Ensure diversity and representativeness of participants
- Clearly define roles and expectations
- Prepare both physical and digital tools in advance
- Set realistic goals and measurable indicators

2. Exploring the Context

Objective:

Understand real needs, challenges, and opportunities.

Suggested Methods:

- Interviews
- Participant observation
- Focus groups
- Analysis of existing data

Expected Outputs:

- Problem definition
- List of user needs
- Contextual insights

Recommendations:

- Involve users early in defining the problem
- Focus on real-life experiences, not assumptions
- Use multiple methods to capture diverse perspectives
- Ensure a safe environment for open sharing

3. Collaborative Ideation

Objective:

Generate ideas collectively with stakeholders/end users.

Suggested Methods:

- Brainstorming
- Design thinking
- World café
- Empathy maps

Expected Outputs:

- Set of ideas
- Prioritized concepts
- Initial solution directions

Recommendations:

- Encourage creativity and avoid early judgment
- Combine technical knowledge with user experience
- Use facilitation techniques to ensure equal participation
- Prioritize ideas based on relevance and feasibility

4. Co-Design and Prototyping

Objective:

Transform ideas into tangible solutions.

Suggested Methods:

- Storyboards
- Wireframes
- Paper prototypes
- Role-playing

Expected Outputs:

- Initial prototypes
- Usage scenarios
- Basic functionalities

Recommendations:

- Keep prototypes simple and easy to modify
- Involve users as active co-designers
- Focus on usability and user experience
- Test multiple design alternatives when possible

5. Testing in Real Context

Objective:
Validate solutions in real-life environments.

Suggested Methods:

- Pilot testing
- Usability testing
- Living Lab experiments
- Structured feedback collection

Expected Outputs:

- Usage data
- Identified improvements
- User perceptions

Recommendations:

- Test in real conditions whenever possible
- Observe actual user behavior, not only reported feedback
- Collect both qualitative and quantitative data
- Ensure continuous feedback during testing

6. Evaluation and Iteration

Objective:
Refine solutions and improve the co-creation process.

Suggested Methods:

- Questionnaires
- Post-test interviews
- Qualitative and quantitative analysis
- Improvement workshops

Expected Outputs:

- Refined solutions
- Recommendations
- Collective learning

Recommendations:

- Use feedback systematically to improve solutions
- Combine different types of data for stronger insights
- Be open to revisiting previous phases
- Document lessons learned

7. Dissemination

Objective:

Record, communicate, and share results.

Suggested Methods:

- Reports
- Presentations
- Scientific publications
- Feedback sessions with participants

Expected Outputs:

- Technical reports
- Scientific articles
- Recommendations for stakeholders

Recommendations:

- Share results with all participants
- Use accessible language for different audiences
- Highlight key learnings and best practices
- Promote knowledge transfer and reuse

Cross-Cutting Principles across all phases

User Involvement

Users should be active participants in all phases. Their experiences, needs, and feedback are essential.

Recommendations:

- Engage users early and continuously.
- Include diverse user perspectives
- Treat users as partners, not just testers.

Ethical Considerations

Ethics is fundamental in co-creation.

Recommendations:

- Obtain the informed consent
- Ensure data privacy and confidentiality.
- Promote inclusion and equitable participation.
- Be transparent about objectives, use of data, and outcomes.

Continuous Feedback and Iteration

Feedback should be collected, analyzed, and incorporated at every stage, so the process and the solutions evolve based on real insights.

Recommendations:

- Collect feedback using multiple methods
- Use feedback to refine both the solution and the process
- Ensure that feedback is transparent

06 Ethics Throughout the Co-Creation Process

Ethics is **a central pillar** of co-creation. Maintaining ethical standards ensures that participants are respected, their data is protected, and the co-creation process is transparent and trustworthy. Ethical practices strengthen the quality, legitimacy, and sustainability of solutions.

Why Ethics is Important

- **Trust and engagement:** Participants are more willing to contribute when they feel respected and safe.
- **Legal compliance:** Ethical practices ensure adherence to laws such as the **General Data Protection Regulation (GDPR).**
- **Quality of results:** Transparent and responsible data handling improves the accuracy and reliability of insights.
- **Inclusivity and fairness:** Ethics guarantees all participants are treated equally and have the same opportunity to contribute.
- **Sustainability:** Solutions developed ethically are more likely to be accepted and implemented.

When Ethical Approval Is Required for Research Involving Human Participants

Research involving human participants must comply with ethical standards designed to **protect individuals' rights, dignity, and wellbeing**. In most academic and professional contexts, approval from an **ethics committee** is required before data collection begins.

All co-creation activities involving human participants should be reviewed and approved by a **competent institutional ethics committee prior to data collection.** In most cases, this refers to the ethics committee of the researcher's host institution (such as a university, hospital, or research organization). In some contexts, particularly in regulated fields or multi-country studies, approval may also be required from a **national ethics authority or regulatory body.** This ensures that the study complies with ethical standards and relevant legal frameworks, including data protection regulations such as the General Data Protection Regulation (GDPR). Ethical review is especially important when personal data is collected, when participation involves potential risks, or when sensitive information is involved.

Ethical approval is generally necessary when a study involves any direct interaction with people, such as interviews, questionnaires, experiments, or observations. And is required when researchers **collect, store, or analyze personal or sensitive data, including information related to health, identity, beliefs, or other private matters.** Studies involving **vulnerable populations** require ethical scrutiny and formal approval.

In **clinical or health-related** research, including trials, interventions, or studies involving medical or psychological procedures, **approval from a relevant ethics committee is mandatory**. Depending on the nature of the study and the country, this may involve institutional review boards as well as national regulatory authorities responsible for overseeing clinical research.

Even when data is already available, ethical approval may still be required if the data is identifiable or can be linked to individuals. Furthermore, many institutions require approval for any research involving human subjects, regardless of risk level.

Some **low-risk studies**, such as fully anonymous surveys or the use of publicly available aggregated data, **may not require ethics committee review**. However, institutional policies vary, and in many cases a simplified review or formal exemption must still be obtained before proceeding.

Regardless of the level of risk, all research involving human participants must adhere to fundamental ethical principles, including **informed consent, confidentiality, data protection in accordance with applicable regulations (such as GDPR), and transparency regarding the purpose and use of the data.**

In summary, ethical approval is typically required whenever research involves human participants, personal data, or any form of intervention. When in doubt, researchers should consult the ethics committee of their host institution or the relevant national regulatory body before beginning the study.

Informed consent

Informed consent is a practical tool to uphold ethics. It ensures participants **understand their role, the purpose of the project, and how their data will be used**, giving them control over their participation.

Key Elements of a Consent Form (GDPR-Compliant)

- **Project Information**
    - Explain the purpose and objectives of the project / activity
    - Describe the process, including tasks participants will perform.
- **Use of Data**
    - Explain what data will be collected (personal data, opinions, recordings).
    - Clarify how data will be used (analysis, reporting, publications).
    - State who will have access to the data.
- **Confidentiality and Privacy**
    - Explain measures to protect participant information.
    - Clarify that personal identifiers will be anonymized.
- **Voluntary Participation**
    - State that participation is voluntary.
    - Participants may withdraw at any time without any consequences.
- **Benefits and Risks**
    - Describe potential benefits (e.g., influencing solution design, contributing to research).
    - Mention possible risks (e.g., discomfort in sharing opinions).
- **Data Retention**
    - Specify how long the data will be stored.
    - Explain how participants can request deletion of their data.
- **Contact Information**
    - Provide contact details for questions about the project or data rights.

Informed consent Checklist

Stage	Task	Details / Notes	Completed (✓)
1. Planning & Drafting	Define project objectives and justify data collection	Identify why consent is needed	☐
	Identify types of data to be collected	Personal, sensitive, opinions, recordings	☐
	Ensure legal compliance	GDPR, or local data protection laws	☐
	Draft initial consent form	Clear, accessible language	☐
	Include essential elements	Project info, data use, confidentiality, voluntariness, risks/benefits, retention, contacts	☐
2. Internal Review	Team review	Verify accuracy and completeness	☐
	Legal/Ethics review	Consult legal or ethics committee if applicable	☐
	Language review	Ensure clarity and inclusivity	☐
	Pilot test	Test comprehension with a small group	☐
3. Participant Communication	Present IC	Before any data collection or participation	☐
	Explain key points verbally if needed	Ensure understanding	☐
	Allow time for questions	Participants can ask for clarification	☐
4. Consent Collection	Obtain signature	Record date of consent	☐
	Confirm voluntary participation	Emphasize right to withdraw at any time	☐
	Provide copy to participant	Keep participant informed	☐

5. During Participation	Respect IC boundaries	Follow agreed terms	☐
	Maintain confidentiality	Protect data at all stages	☐
	Notify participants of changes	If project or data use changes	☐
6. Storage & Archiving	Secure storage	Restricted access	☐
	Protect personal data	Anonymize	☐
	Record withdrawals	Take action as needed	☐
	Define retention & deletion	Follow retention schedule and secure disposal	☐
7. Post-Project	Confirm IC archiving	Ensure all forms stored correctly	☐
	Update records	Report on data usage as promised	☐
	Review lessons learned	Improve future IC practices	☐

Informed consent template

[PROJECT NAME]

Welcome aboard the [PROJECT NAME] project!

You have been invited to join the activities in the scope of [PHASE/ACTIVITY]. After receiving this document, you can ask any questions and take the time you need to make an informed decision about participating. If you choose to proceed, you will be asked to provide your voluntary, free, and written consent (see Informed Consent Form, page ___).

Participation is entirely voluntary. You can withdraw at any time, without any consequences, by filling out the Revocation Form (page ___).

About the [PROJECT NAME] Project

[PROJECT NAME] aims to [GENERAL GOALS / PURPOSE].

Main objectives:

1. [Objective 1]
2. [Objective 2]
3. [Objective 3]
4. [Objective 4]

Participation

How can I participate, and why was I invited?

You can participate by [FOCUS GROUPS/INTERVIEWS/OTHER ACTIVITIES]. You were invited because your profile aligns with the target group for this phase [REASON].

What may I expect from my participation?

Participation is voluntary, and no compensation is expected. You may be asked to [ATTEND MEETINGS/RESPOND TO QUESTIONS/OTHERS] about [TOPICS].

Expected benefits and risks:

- Benefits: [List if there are any potential benefits]
- Risks: [List any potential risks, e.g., minor disruption to routine]

Data Collection

Types of data collected, duration, and processing:

- e.g. Demographic information: [AGE, EDUCATION, ETC.]
- e.g. Opinions and perceptions
- e.g. Contact information for follow-up

To protect your privacy, your name will be replaced by an alphanumeric code (pseudonymization), which only the data controller at [INSTITUTION] can link to your name. Your contact details will only be used to communicate with you about the study and will be stored separately from the research data. This way, we will not include your personal identification data in the study analyses, only the corresponding alphanumeric code. As a result, no other researcher will be able to identify your responses. This code will never be shared internally or externally. Your pseudonymized data will be stored for research purposes at [INSTITUITION], with the aim of conducting scientific studies by the [PROJECT] partners and potentially verifying the adequacy and reliability of it.

During the study, your pseudonymized data will only be shared with institutions that are part of the project consortium. At the end of the study, if your data is shared with other researchers and research institutions that are not part of this consortium, it will be anonymized. Likewise, any publications resulting from this study will not include any personal data that could lead to your identification. After a retention period of [RETENTION PERIOD], the data will be destroyed (only a few necessary documentation might be kept for a limited period for audit purposes according to each institutional requirements).

Withdrawal of Participation

Participation is expected until [END DATE]. However, you may leave the study at any time without consequences for you or your relationship with the inviting organization and without needing to provide any explanation.

Your rights include:

- Access your data
- Rectify your data
- Request deletion of your data
- Withdraw consent without any impact

*Keep in mind that exercising these rights depends on the project's current phase. For instance, rectifying or deleting data is not possible once the data has been processed or the research results have been published. If you choose to terminate your participation early, data collected up to the moment you notify the research team will remain valid and used for research purposes unless you expressly state otherwise. If you have any concerns regarding your data, you may contact the research team or the competent data protection authority, when applicable.

Main Contact Details

- Project coordinator: [NAME / EMAIL]
- Research coordinator: [NAME / EMAIL]
- Research team: [NAME / EMAIL]
- Data protection officer: [NAME / EMAIL]
- National data protection authority: [CONTACT]

Informed Consent Form

Please check the boxes if you agree:

- ☐ I have read the Participant's Information Sheet and had the opportunity to ask questions.
- ☐ I understand that participation is voluntary and can withdraw at any time.
- ☐ I consent to the collection, processing, and storage of my data as described.
- ☐ I consent to the use of my image and voice for dissemination [IF APPLICABLE].
- ☐ I understand that my data will be processed and stored according to GDPR.

I freely and voluntarily agree to take part in the [PROJECT NAME] research study:

☐ Yes ☐ No

PARTICIPANT NAME: _____

PERSONAL DOCUMENT: _____

CITY/DATE: _____

SIGNATURE: _____

Pseudo-anonymisation code: _____

Declaration Form (Researcher)

- ☐ I have provided all necessary information about this study.
- ☐ I have confirmed the participant's understanding.
- ☐ I have given sufficient time for reflection and questions.
- ☐ I did not exert any coercion.

RESEARCHER NAME: _____
CITY/DATE: _____
SIGNATURE: _____

Revocation Form

(Just sign if you decide to withdraw participation)

I, (PARTICIPANT NAME) _____ with identification number _____, REVOKE my consent to participate in the [PROJECT NAME] study.

CITY/DATE: _____
SIGNATURE: _____

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