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Ethos

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NOTE: Please update the [OVN wiki page on Ethos](#), based on the evolution of this doc.

Table of contents

[Definitions](#)

[Objective](#)

[Process](#)

[Sensorica's digital resources](#)

[Resources from other organizations](#)

[Notes](#)

[Overview](#)

[Organization](#)

[Influential studies on CBPP](#)

[Modularity](#)

[Granularity](#)

[Ethics](#)

[Output quality](#)

[Incentives and rewards](#)

[Initial ideas here](#)

[Organization approach-Methodology to gather data](#)

[Bureaucratic Culture](#)

[Competitive Culture](#)

[Centralisation](#)

[The extent to which functions are dispersed in the organization, either in terms of integration with other functions or geographically.](#)

[Flexibility](#)

[Integration](#)

[Contract relations between employee and the organisation](#)

[Affirmative leadership style](#)

[Loyalty](#)

[Regulations & Rules](#)

[Cultural Identity](#)

[Achieving to quantitative objectives](#)

[Learning Culture](#)

[Participative Culture](#)

[Knowledge expansion](#)

[Flexibility](#)

[Sensitive and responsive to external changes](#)

[High integration](#)

[Complex environment](#)

[Loyalty](#)

[Competitive advantage](#)

[Personal Commitment](#)

[Informed about the environment](#)

[Team working](#)

[Gathering environmental information and process](#)

[High level of society acceptance](#)

[Service development](#)

[Tendency to satiability](#)

[Encourage innovation, creativity and learning](#)

[Organisational commitment/Trend to change](#)

[The Ten Pillars](#)

[Pattern extraction](#)

[Final text here](#)

[Bibliography](#)

[Organisation](#)

[Value Creation/Quality](#)

[Ethos](#)

Definitions

Ethos: defines the ethical standards.

What are the socially acceptable norms within Sensorica?

These socially acceptable norms are used to judge peer's behaviour.

Distinction between *ethics* and *moral*

Ethics are external standards that are provided by institutions, groups, or culture to which an individual belongs. For example, lawyers, policemen, and doctors all have to follow an ethical code laid down by their profession, regardless of their own feelings or preferences. Ethics can also be considered a social system or a framework for acceptable behavior.

Morals are also influenced by culture or society, but they are personal principles created and upheld by individuals.

[Source](#)

Objective

Formalize Sensorica's ethos, making the OVN's evolution less dependent on founders. Constrain governance making within ethos boundaries.

This work is performed in a real *commons-based peer production* (CBPP) environment, in the context of the [Greens for Good](#) of Sensorica. The results will be extrapolated to the entire Sensorica OVN and further to other CBPP initiatives.

We see ethos as the foundation on which governance is built, a framework that constrains rules making and decision making. As we're slowly but surely moving to blockchain infrastructures to create our digital working environments, we are starting to automate some of the governance through smart contracts. How much of the governance will be on chain (embedded) and how much of it will be left to off chain politics? Game theory and economic considerations will be in tension with ethical considerations. For example, some people will advocate for generating individual wealth, others for maximizing public good. A solid ethos foundation is the key to avoid spending too much energy fighting over conflictual natural tendencies. Ultimately, formalized ethos should become machine readable to interact with smart contracts. It should form the boundaries of embedded governance. Further in the future, codified or formal ethos should also guide AI, if used for adaptive governance, i.e AI-driven rules making.

You might think that we're not there yet, but the day of smart contracts approaches fast. In anticipation, we're moving in that direction by codifying our ethos at least to make it more clear

for humans, and we are linking it directly to our governance. Every rule that we make should refer to primitives of the ethos.

Ethos-related problems

- When the actions of an organization depart from its formal ethos of an organization, members' perception of legitimacy changes, which leads to psychological contract breach, organizational cynicism, and unethical behavior.
- Relations between leadership and organizational ethos are well established. In CBPP leadership becomes desincarnated, a distributed process, therefore the ethos should not reside in the founders or the initiators of a network. When founders become inactive the network can drift.

Process

Openness (access to participation) and its corollary Transparency (access to information) are important characteristics of CBPP initiatives. The level of access to processes and information is specific to every initiative. It is caused by the change in the modular and granular setting which affects horizontal and vertical transparency between members of the platforms (discussed later). This change greatly affects the working environment, new dimensions come to work giving individuals the ability to express themselves. The question becomes "how to use and structure these dimensions?" for that we need to work maybe from the weaknesses. In other words, what are the common weak points that CBPP platforms face, on an organisation level, and how can we mend them while keeping the ethical foundation intact? We can work case by case and try to draw parallels between them.

We can start by exploring CBPP positive organization traits on one side and the weaknesses on the other.

Sensorica's digital resources

- [Dealing with companies](#)
- [Governance page](#)

Resources from other organizations

[GOSH's manifesto](#)

[SEEDs Constitution](#)

[Ethos from Topos](#)

Original Driving Ethos from [Brent](#)

Notes

General notes, everything is subject to editing

As you will see, we will have a lot of room to cover. Also, any help with guiding this would be truly appreciated.

Step 1 - literature review

Perform a literature review correlating organizational structure (ethos and governance) with organizational output, while focusing on organizations that operate on common-based peer production (CBPP). Also, research about how incentive systems affect individual behavior in both market transactions and CBPP - game theory framework. Identify the factors (variables) that play an important role in forming a solid ethos foundation and that can impact the performance of the organization. Note: the bibliography is listed at the end of the document.

Step 2 - extract guidelines

These guidelines will be put to the test in real case scenarios. Several approaches will be tested.

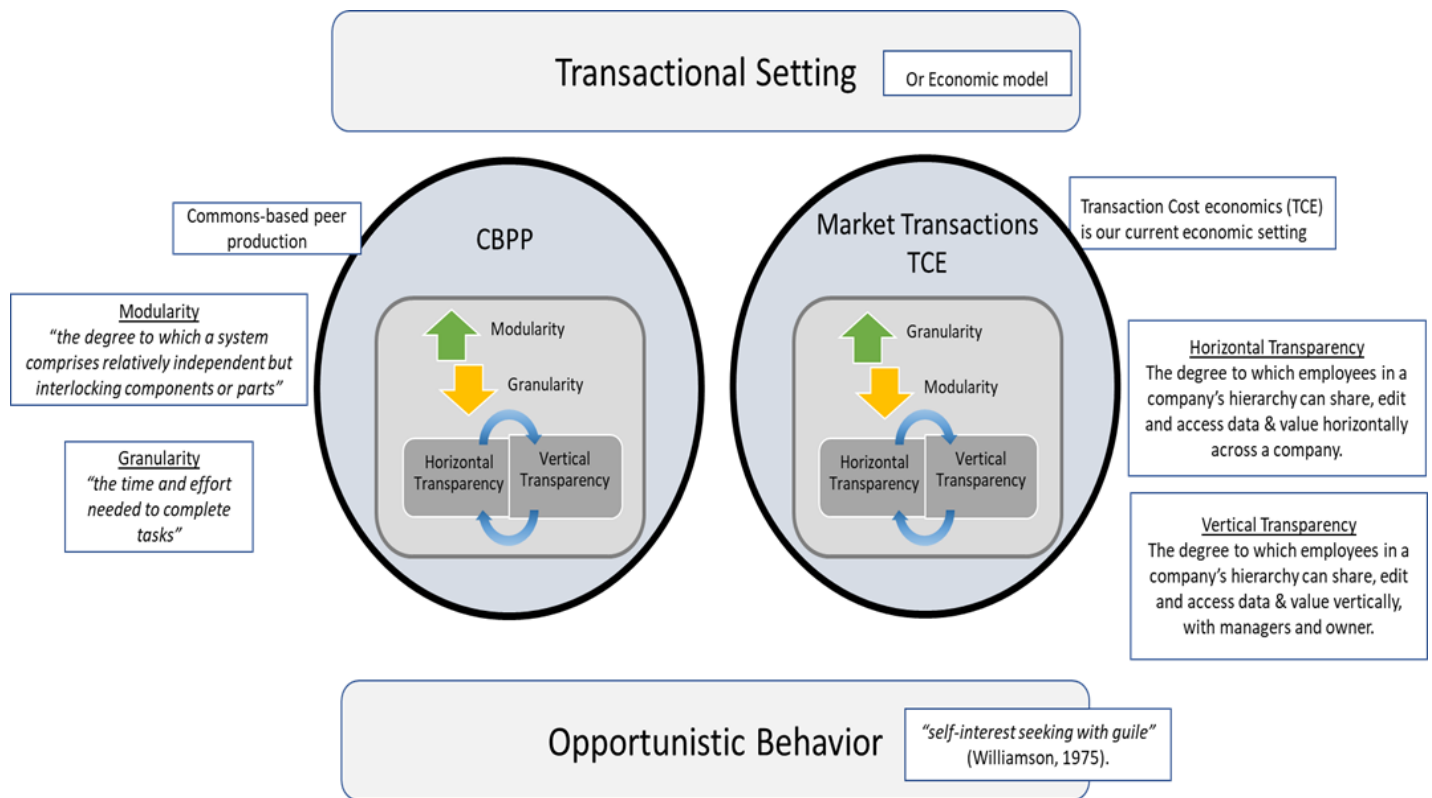
Data Collection

Define how and what data to collect.

Define how to organize the data.

Those two points will be set when we'll have a clearer view of the directions we are taking.

Overview



This image attempts to offer the general picture.

- We mainly have two different transactional settings (or economic models): CBPP and TCE.
- Both, like any model, have a level of modularity and granularity (both explained in pic).
- Due to its open, collaborative and meritocratic nature, CBPP adopts a more modular and less granular setting. Allowing for a bigger number of collaborators, while decreasing the time and effort needed to complete tasks individually.
- Market transactions organize ventures, projects and tasks within a legal, centralised and financially centered framework. Costs and profit tend to define how we approach modularity and granularity.
- The new modular and granular setting within CBPP creates a new working environment. Horizontal and vertical transparency (in pic) both behave differently. Collaborators in CBPP can access, share and edit data and value much more than market transactions.
- Does the change in Horizontal and vertical transparency create the virtues/dimensions we are seeing?
- Do those dimensions directly affect opportunistic behavior (OB)?

- On the other hand, if market transactions are too rigid; CBPP can fall into the other extreme, too fluid. The open governance still lacks structure. Several weaknesses to explore and tackle.
- How to quantify our dimensions? How to use them to structure a more solid and sustainable governance model?
- Two positive points: first, we have many dimensions to work on. Second, we have CBPP platforms to explore.

Organization

Organization in CBPP is a heavily researched field. We will explore several articles that delved into this dimension. Yet, we aim to find the best sustainable CBPP model from the Ethos lens. How can we build a sustainable CBPP structure that lays on an ethical infrastructure? (and all the sub-questions derived from this).

To consider ethics in a CBPP organizational setting, we define opportunistic behavior as “self-interest seeking with guile” (Williamson, 1975).

Influential studies on CBPP

Benkler (2013) explores how CBPP plays a more significant role in the information production environment. Chetkovich (2011) explores collaborative public management. Yates, Dave & Paquette (2010) focuses on crisis management of natural disasters. Xue, Zhang, Ling & Zhao (2013) show how its versatility in organizing and mixing different components systems despite the differences and challenges allows for easier integration and vertical cooperation. Von Hippel & von Krogh (2007) researched the comparative advantages of CBPP as an organizational and institutional model of collaborative innovation and information production. Finally, Bauwens (2005, 2007, 2009, 2017, 2019) did extensive research in this field.

Our approach understands organizations that operate on CBPP will rely on two main variables: modularity and granularity. Every transactional setting (economy system, market setting) has a different modular and granular balance. In other words, modularity and granularity define the overall organization of operations, projects and tasks.

Modularity

Cabigiosu, Zirpoli & Camuffo (2013) define modularity as “the degree to which a system comprises relatively independent but interlocking components or parts”.

Modularity in CBPP and market transactions

Due to its open nature, CBPP allows for a larger pool of collaborators to participate in ventures when compared to a traditional company in market transactions. Its heavy reliance on the internet/digital technology makes it an essential factor for why CBPP production is vastly spread, universal and at the reach of millions of individuals worldwide (Benkler 2013, Ducharme

2018, OCDE 2011 and Smith 2004). The number of collaborators is substantially more significant than market transactions. This increase in modularity, combined with collaborators' ability to join anytime and the absence of rigid centralized hierarchy, makes CBPP a more flexible setting to design, adapt and communicate between the different "independent but interlocking components or parts."

Market transactions define modularity through rigid structure stemming from the centralized hierarchy. Design, adaptation and communication between the different "independent but interlocking components or parts" have proved very difficult inside and outside the company. The literature covering this aspect is extensive.

Existing literature shows that higher modularity positively affects timeliness, manufacturing performance, and new products' frequency (Gershenson, Prasad & Zhang 2003, Gomes & Joglekar 2008, Langlois 2002 and Vickery, Bolumole, Castel & Calantone, 2015). Cabigiosu, Zirpoli & Camuffo (2013), Gomes & Joglekar (2008), Kamrad, Schmidt & Ülkü (2017) explores how product modularity positively affects innovation performance, development time, coordination efforts and launch speed. Gawer & Cusumano (2007) also how product modularity enables the introduction of new features and functionality without an impact on the overall product family or line.

Granularity

Brown, Dev & Lee (2000), Crosno & Dahlstrom (2008), Jap & Anderson (2003), Lui, Wong, & Liu (2009), Stump & Heide (1996), Wathne & Heide (2000) and Jap, Robertson, Rindfleisch & Hamilton (2013) show that the bigger the tasks, the fewer employees we contract and hence less cost and more profit. Yet, this lays heavy burdens on employees and makes the organization more prone to errors.

Benkler (2002) defines granularity as the time and effort needed to complete tasks. When measuring granularity from a firm perspective, it is absolute, e.g. maximum time given by a crowdsourcing organiser for submitting a contribution to the contest. From the contributors perspective, granularity is perceptual. Since we are talking about the amount or the size of time and effort, the perception of low or high (relative aspect) time and effort are crucial/important.

In market transactions, a company employs an individual based on previously set competencies, academic requirements, experience, specific job descriptions with a set of workdays/ hours. The main negotiations revolve mainly around financial compensation that will culminate in a contract of mostly legal nature, full employment, part-time or freelancer (Williamson, 1979 and Hennart, 2010).

CBPP allows for collaborators to choose how much time and effort they are willing to invest. In this, tasks should be broken down to minuscule proportions. With no financial expectation (discussed later), collaborators know what to expect. It is a "meritocracy", collaborators get what they invest. The reward/incentives system is very different from market transactions. A theme we will also cover.

We also attach each functional aspect of the product and implement one physical block where interactions between those distinct chunks enable the product's functioning (Vickery, Bolumole, Castel & Calantone, 2015).

(Bennett, Segerberg & Walker 2014 and Kostakis 2011)

Ethics

Arvidsson & Peiterson (2013) explored the ethical economy, and another research done by Benkler & Nissenbaum (2006) explores CBPP and virtue. They identify how CBPP positively affects autonomy, independence, liberation, creativity, productivity, charity, generosity, sociability, friendship, cooperation, civic virtues and many other aspects.

Output quality

Studies argue that CBPP produces a sense of independence, collaboration, synergy, social happiness, self-reflection, and self-satisfaction. It allows people to start their ventures or join any venture they feel they can add value (Choi, Kim & Yu 2009). These variables, according to Benkler (2007), make CBPP a more productive transactional setting, in terms of value creation and distribution, compared to market transactions.

Several other studies, see bibliography, also explore output quality in CBPP. All will be explored.

Moilanen (2012) did two studies: the first involved two hundred and fifty (250) participants from 87 hacker communities in 19 countries; in 2010, their number of participants was 201.

Both studies showed that CBPP empowers "social motivation factors": community commitment, shared value, high interest in meeting other hackers, and sharing experience and camaraderie.

Benkler (2013) and Kostakis & Drechsler (2015) reinforce those findings and results.

Commons-based peer production shows that individuals are attracted by the multi-value system mentioned earlier. Reputation and a sense of belonging, gaining knowledge and expertise, internal and intrinsic motivations are all positive incentives that shift people from the heavily focused monetary market-based setting

Incentives and rewards

We will explore research on incentives and rewards and their effect on our behaviour in CBPP and market transactions.

Reputation and a sense of belonging, gaining knowledge and expertise, internal and intrinsic motivations are all positive incentives that shift people from the heavily focused monetary market-based setting. Financial incentives do not disappear, but they play a peripheral role.

Benkler (2013) explores motivation, organisation, effectiveness, or value to innovation and other areas where we can use peer production.

Von Hippel & von Krogh (2007) explain how users' feedback helps resolve the bugs and even include them at a later stage in the software designing process under updates terms and benefits instead of going to the regular operation of hiring professionals and assigning job descriptions.

Ajith (2019), Bowles & Huwang (2008) and Bowles & Polanía-Reyes (2012) did extensive experimental and observational research that shows how the effects of the standard economic incentives tools or, in other words, explicit material rewards and punishments, reduces motivation across the target population.

Initial ideas here

// ...

Please enter opinions that you think represent all types of actual and potential members of SENSORICA, individuals, small traditional partner organizations, academic researchers, consumer's advocates (which might decide to join our open venture at some point)... We must also take into consideration the consumer who can, at any moment, become an affiliate of SENSORICA and contribute.

Enter short ideas, bullet points, and once everyone had a chance to participate we'll merge everything into a final text, see below.

If we have disagreements we can bring them to [suggestions](#) work on them. It also includes voting. Use **comments** [select, Insert/comment or *Ctrl+Alt+M*] to mark points you don't agree with.

...//

Some dimensions of ethos

- Share
 - Embrace open innovation.
 - Pragmatic arguments: open innovation is rapid (if it's slower, we're doing something wrong), involves passion, increases the level of involvement, enhances creativity, motivates customers and final users to contribute to the, increase dissemination of products, creates a market, generates loyalty, trust through transparency, leads to market success.
 - Share resources rather than individually owning them for personal use or rent extraction.
- Help your fellow citizens
 - Strongly favor a local approach
 - Pragmatic argument: Enforce the local economy, build local resilience.

Connect globally.

- Pragmatic argument: remix, save time to innovate
 - Value and apply locally developed knowledge and know how to the local economy first and spread it globally through our network, in order to develop/straighten other local economies.
- Empower the individual
 - Transfer economic power to the individual (creator and producer) rather than institutions.
 - Reduce or eliminate power relations, rely on value-based relations, self-organization relying on a feedback system and voluntary subordination.
- Be faire / faire organization
 - Fair reward system based on contribution.
- Act sustainably, sustainable organization
- Collaborate rather than compete.
- Re/defining the concept of “ownership”
- Re/define the reason for peers co-creation

Ian's contribution: [what is UBUNTU?](#)

- The most important aspect of teamwork is individual achievement, while recognizing the importance of cooperation over competition.

Conflict: Can be constructive or destructive. How can we allow constructive conflict. Conflict is required. We need a medium to make conflict constructive.

Organization approach-Methodology to gather data

Richard Daft in his book, Organizational Theory and Design (West Publishing, St. Paul, Minnesota, 1992), classifies organization dimensions into two categories of structural and contextual.

This is one of several approaches to organization, please do offer any other or adjust this to CBPP platforms.

This table is to give an idea about the first aspect to tackle.

We can also break down the different dimensions to sub-dimensions to give a clearer picture.

Bureaucratic Culture	Strength	Weakness	Competitive Culture	Strength	Weakness
Centralisation <i>The extent to which functions are dispersed in the organization, either in terms of integration with other functions or geographically.</i>	-Resilience: Lack of PoF (point of failure) - distributed responsibility - No Bottleneck 1000 Flower Blossoms - processes are distributed - Better allocation of resources - multi pathways (multiple possible sources) - self-allocation, crowdsourcing - Low information opportunity cost (Information as a resource comes from multiple sources) - shared knowledge, collective intelligence -No proprietary strategies	Discrepancy: Few sites/platforms with large attention. Majority fewer attention -Failure in public discourse: weak effects as compared to the commercial, mass-media-based public sphere. -Fluid: People leaving at any time, projects unfinished, low participation in the majority of platforms.	Flexibility	-High: Projects, work processes, individual contribution and overall operations are highly flexible	-Loose sense of things: Fluid
Hierarchy	-Transparency: strong vertical and horizontal transparency. -Collaboration: strong sense of safety, open environment and trust. -Community: Lack of hierarchy creates a strong communal identity	-Fluid: again, people not following up on tasks. -Efficiency: output is affected. People are expected to contribute. -Human resources: people leaving anytime.	Integration	-High: CBPP allows people to join and leave willingly. Integration is founded on social settings vs corporate settings.	-Different Expectations: market is used to corporate social behaviour.CBPP seems a distant model.
Routinization <i>Regarding the extent that organizational processes are</i>	-Level of routinization: Although we see lack of routinization in several areas where individuals can contribute freely; we see routinization in the deepest layer of work. Sensorica is highly organized; mainly in how	-Complex: Being open-source and having a rich infrastructure and database; it could take a long time and it's challenging to fully understand the details.	Contract relations between employee and the organisation	-No contracts: open and transparent environment totally dependent on the individual's will and motivation. A meritocracy	-No contracts: fluid and unstable workplace.

<i>standardized</i>	work and projects are designed and approached. Once the main infrastructure is set, routinization falls.				
Affirmative leadership style	-High: Being collaborative, all collaborators are equal. The open & transparent environment clears the road for affirmative leadership style only. -High trust - High autonomy	-Hands-off -Complacency -High dependance - Low performance	Loyalty	-Increased loyalty within CBPP organisations.	-The open and collaborative work tends to have low retention. Loyalty can quickly dive or disappear
Regulations & Rules <i>Regarding the extent of policies and procedures in the organization</i>	-Open-source: large community, transparent, lack of policies and procedures. -Individual freedom: to work, self-express, choose type and time of work. -Work processes: are more fluid, collaborative and efficient at ultimate level.	-Discipline: Lack of policies and procedures affects contribution and discipline. -Efficiency: low efficiency and output. -Motivation: Policies & procedures tend to increase motivation	Cultural Identity	-We can strongly argue that cultural identity is more diverse, inclusive and powerful in CBPP platforms.	-Finding ways to empower cultural identity and transmitting it even further.
Training	-No official training: gives a strong feeling of independence and lack of duties. -Collaborative orientation.	-Due to the complex nature of Sensorica. Some training sessions might be needed.	Achieving to quantitative objectives		

Learning Culture	Strength	Weakness	Participative Culture	Strength	Weakness
Knowledge expansion	-Very high: Open and transparent access to the full range of conceptual frameworks, methods, data and	-	Flexibility	-Sensorica is highly flexible: Forking, work processes, human resources and others	-Lack of structure that can generate high loyalty and high output in some cases

	tools				
Sensitive and responsive to external changes	-Very adaptable.		High integration		
Complex environment			Loyalty		
Competitive advantage			Personal Commitment		
Informed about the environment			Team working		
Gathering environmental information and process			High level of society acceptance		
Service development			Tendency to satiability		
Encourage innovation, creativity and learning					
Organisational commitment/Trend to change					

The Ten Pillars

Before we finalize and figure out our 10 pillars that will work as our ethical governance backbone, two things are necessary:

1. Review OVN structure-Define the main dimensions of what is OVN (*I know there is a large file regarding this; what I mean here is identifying the main structural dimensions of what is OVN*). <https://www.sensorica.co/governance> Will be used as reference
2. Investigate in different organizations around the world that may function similarly: e-NABLE, Maker's Asylum, Ecosystem mapping.



We need access to the OVN wiki.

Tibi - Ask Jeff to install the OVN wiki in Opalstack.

- ☒ ~~Send email to Jeff~~
- ☐ Implement OVN wiki

Pattern extraction

{DO NOT EDIT HERE. LET'S WAIT UNTIL WE EXHAUST THE INITIAL IDEAS EXERCISE}
{Here we create a synthesis of the first section.}

Final text here

{DO NOT EDIT HERE. LET'S WAIT UNTIL WE FINISH PATTERN EXTRACTION}

Bibliography

Here we will post the research papers that we will be working on during our research.
As mentioned in step 1, we have three main dimensions: Organisation, Value/Quality and Ethos.
Possibility to increase

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Find papers of formal ethics as in codified, ethical formalism.

Find papers that treat the relation between ethos and governance, how these things are articulated within organisations.

Interesting paper: [Formalization of Ethics: The issue of standardization. by Juliette Arnal](#)