

SustainX

Roadmap for scaling the OSS

T5.5 – Scaling the One-Stop-Shop localisation support for SMEs



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WP5 – Marketing & Project Management

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Executive Summary

This document has been developed within **Task T5.5 – Scaling the One-Stop-Shop localisation support for SMEs**, as part of the final scaling phase of the SustainX project. It provides a structured and practical roadmap for scaling, replicating and adapting the SustainX One Stop Shop (OSS) support model in regional and interregional contexts.

The SustainX OSS is designed as a permanent public-private innovation support hub that helps SMEs access coordinated services related to EU funding, applied research and development, regulatory and certification guidance, market access, digital transformation, AI readiness, skills and capacity building. The model builds on the WP3 OSS concept and is anchored by **TUIASI**, with **DIZ** acting as an ecosystem and SME-support partner. Its added value lies in bringing together different types of expertise and support services into a single, structured SME journey.

The roadmap focuses on moving from the pilot OSS model towards a scalable support system that can continue beyond the funded implementation period. It proposes a clear pathway for the period **M19–M24**, covering preparation and alignment, stakeholder mapping, engagement and validation, roadmap activation, implementation and monitoring, and final evaluation and continuation. These steps are supported by dedicated workstreams for partner mobilisation, service package adaptation, regional pilot activities, interregional referrals, monitoring and sustainability.

A key principle of the roadmap is that replication should preserve the core operating logic of the SustainX OSS while allowing each region to adapt the model to its own ecosystem. This means maintaining the dual-track SME support approach, the six service pillars and the common SME journey, while adapting the institutional setup, service providers, financing options and delivery mechanisms to local needs and capacities.

The document also provides guidance for organisations that wish to replicate the OSS model, including regional associations, clusters, EDIHs, universities, research and technology organisations, chambers of commerce and innovation intermediaries. It defines the minimum replication package needed to start, including a coordinator, partner pool, service offer, SME intake route, referral mechanism and monitoring system. This ensures that the OSS can be implemented even in regions that begin with limited resources or only a few active service pillars.

The six-month replication roadmap offers a practical sequence of actions, from confirming the replication scope and mapping partners to adapting the service catalogue, creating the SME intake route, running outreach activities, delivering pilot support, monitoring results and deciding on continuation. The roadmap is complemented by governance recommendations, risk mitigation measures and a checklist of expected outputs that can be used for reporting, monitoring and follow-up.

Overall, this document supports the long-term sustainability of the SustainX results by transforming the OSS from a project-based pilot into a replicable model for regional SME support. It provides partners and external organisations with a practical framework to strengthen innovation ecosystems, improve SME access to services and build continuation pathways beyond the SustainX project period.

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1. SUSTAINX ROADMAP FOR SCALING THE OSS SUPPORT SYSTEM

A. INTRODUCTION

This document has been developed in the framework of **Task T5.5 – Scaling the One-Stop-Shop (OSS) localisation support for SMEs**, as part of the final scaling phase of the SustainX project. Its purpose is to provide a structured roadmap for scaling up the OSS support system beyond the initial pilot phase, ensuring that the model can be further developed, adapted and implemented in other regional and interregional contexts.

The OSS model represents a practical support mechanism designed to help SMEs access coordinated guidance, services and ecosystem connections related to sustainability, innovation, digital transformation and business development. Building on the experience and results generated during the project implementation, this roadmap aims to translate the lessons learned into clear actions that can support replication, partner alignment and long-term continuation.

Covering the period M19–M24, the document serves as a working tool for SustainX partners during the final project scaling phase. It supports internal coordination, reporting and follow-up by outlining the steps needed to identify scaling opportunities, involve relevant regional actors, plan implementation actions and monitor progress. At the same time, it provides a practical reference for partners and stakeholders interested in adapting the OSS approach to their own local context.

The roadmap is intended to be flexible and implementation-oriented. Rather than offering a fixed model, it provides a common structure that can be adjusted according to regional needs, available resources, stakeholder capacity and the maturity of local SME support ecosystems. In this way, the document contributes to the sustainability of the SustainX results and supports the broader objective of strengthening regional support systems for SMEs.

This document builds on the WP3 OSS concept. The OSS is defined as a permanent public-private innovation service hub connecting SMEs to EU funding, applied R&D, regulatory expertise and cross-border networks. It is designed as a structural output that should continue beyond SustainX, with TUIASI as institutional anchor and DIZ as ecosystem partner.

Element from WP3 OSS concept	Implication for T5.5 scaling
Two-track operating model	Scaling should preserve both the SustainX-aligned track for mapped SMEs and the open independent track for wider regional SMEs.
Six core service pillars	Partner mapping and implementation should identify actors able to support funding, R&D, regulatory,

Element from WP3 OSS concept	Implication for T5.5 scaling
	market access, digital/AI and capacity-building services.
SME journey	All regions should use the same intake, diagnosis, service matching, active support, network integration and outcome follow-up flow.
Post-project sustainability	The scaled model should rely on an open client base, institutional anchoring, fee/cost-recovery options and regional co-funding where possible.
Replication pathway	Regional partners may start as satellite access points and later evolve towards replicated OSS nodes under a shared quality framework.

B. ROADMAP OBJECTIVE & LOGIC

The roadmap translates the WP3 OSS concept into a practical T5.5 scaling pathway for the final implementation period. It focuses on moving from a pilot OSS model towards a regional and interregional support system that can continue after SustainX.

Roadmap layer	Purpose	Main output
Conceptual scaling	Clarify how the OSS model can be transferred from the WP3 pilot into a broader ecosystem support mechanism.	Shared scaling approach and service package
Regional anchoring	Connect the OSS to associations, clusters, hubs and public/private stakeholders.	Regional partner network
Interregional collaboration	Use the SustainX partner countries and networks to support referrals, consortia and market access.	Cross-border cooperation route
Operational testing	Run practical activities with selected partners and SMEs.	Tested support activities and evidence
Sustainability	Prepare continuation after project closure.	Continuation model and KPIs

C. TIMELINE

The table below presents the proposed scaling timeline for the period M19–M24. It identifies the main focus for each month, the key activities to be implemented and the expected outputs that should be collected for reporting and follow-up.

Period	Scaling focus	Key activities	Expected outputs
M19	Preparation and alignment	Confirm T5.5 scope; review WP3 OSS service catalogue; define target regions and partner categories.	Agreed scaling scope and working plan
M20	Stakeholder mapping	Identify associations, clusters, hubs, chambers and regional actors; score and prioritise potential partners.	Partner mapping matrix and shortlist
M21	Engagement and validation	Contact high-priority actors; organise bilateral discussions or a validation workshop; confirm collaboration roles.	Validated partner pool and regional needs summary
M22	Roadmap activation	Launch selected pilot scaling activities, such as OSS information sessions, referral process, regulatory clinic or funding scan sessions.	Pilot activity plan and SME pipeline
M23	Implementation and monitoring	Deliver support activities with selected regional partners; collect data on SMEs reached, needs identified and referrals.	Implementation evidence and KPI tracking
M24	Evaluation and continuation	Evaluate results; define continuation measures; prepare reporting input and post-project recommendations.	Final evaluation, lessons learned and continuation plan

D. SCALING WORKSTREAMS

The table below defines the main workstreams required to activate and scale the OSS support system. It clarifies the roles of partners, the practical actions to be carried out and the type of evidence that should be collected during implementation.

Workstream	Lead/support	Actions	Deliverable evidence
WS1 – Partner mobilisation	DIZ, TUIASI, regional partners	Map, contact and confirm associations/clusters for OSS scaling.	Stakeholder list, emails, meeting notes

Workstream	Lead/support	Actions	Deliverable evidence
WS2 – Service package adaptation	TUIASI, DIZ	Translate the six OSS pillars into a simplified offer for regional partners and SMEs.	Service flyer, presentation, intake form
WS3 – Regional pilot activities	Selected partners	Run information sessions, clinics, diagnostics or referral activities.	Agenda, attendance list, photos/screenshots, activity notes
WS4 – Interregional referrals	SustainX partners	Connect SMEs to cross-border contacts, EEN/NCPs, labs or market partners.	Referral log and follow-up status
WS5 – Monitoring and continuation	WP5 coordination	Track outputs and outcomes; prepare sustainability recommendations.	KPI dashboard and continuation actions

E. MILESTONES AND DECISION POINTS

The table below presents the key milestones and decision points that will guide the scaling process. These checkpoints help partners monitor progress, validate collaboration roles and prepare the continuation route beyond SustainX.

Milestone	Timing	Decision or result required
Scaling scope confirmed	End M19	Regions, target stakeholders and OSS service package approved.
Partner shortlist validated	End M20	High-priority associations/clusters selected for outreach.
Collaboration roles confirmed	End M21	At least several actors confirm outreach, referral or co-delivery role.
Pilot activities launched	M22–M23	Selected SMEs receive support through the scaled OSS model.
Continuation route agreed	M24	Partners agree what continues after SustainX and how it will be monitored.

F. RISK MANAGEMENT

The table below identifies the main risks that may affect the scaling of the OSS support system and proposes mitigation measures. This helps partners anticipate possible challenges and agree on practical responses during the final implementation phase.

Risk	Mitigation
Low engagement from associations/clusters	Use existing trusted relationships through DIZ, TUIASI and SustainX partners; provide clear benefits and simple collaboration roles.
OSS offer perceived as too complex	Start with a simplified entry package: diagnosis, funding scan, referral and one thematic clinic.
Limited time in M19-M24	Prioritise high-impact actions that create evidence for reporting and continuation.
Unclear post-project ownership	Confirm TUIASI-DIZ governance and define regional partner roles before the final evaluation.

2. ROADMAP FOR REPLICATING AND SCALING THE OSS

A. INTRODUCTION

This section provides a practical roadmap for replicating and scaling the SustainX One Stop Shop model. Its main purpose is to guide SustainX partners and other regional organisations in moving from the pilot OSS concept towards a functioning local or interregional support system for SMEs.

The roadmap is intended for SustainX partners, regional associations, clusters, EDIHs, universities, research and technology organisations, chambers of commerce and innovation intermediaries that wish to adapt the SustainX OSS approach to their own ecosystem. It explains how the model can be replicated step by step, from understanding the original SustainX logic to identifying local partners, adapting the service offer, piloting support activities and preparing continuation beyond the project period.

The document should be used as a working and implementation-oriented guide. Users are encouraged to follow the proposed steps, complete the suggested templates, collect the recommended evidence and adjust the model according to their regional context, available resources, stakeholder capacity and SME needs.

The model replicated through this roadmap is the **SustainX One Stop Shop**, understood as a dual-track SME support model structured around six service pillars and a common SME journey. The objective is not to copy the institutional setup exactly, but to reproduce the core operating logic in a way that is realistic, useful and sustainable for each region.

B. THE SUSTAINX OSS MODEL TO BE REPLICATED

The SustainX One Stop Shop (OSS) is a permanent innovation support hub designed to help SMEs move from an idea or business need to concrete innovation, funding,

R&D, regulatory, market and capacity-building support. The replication objective is not to copy the institutional form exactly, but to reproduce the operating logic in another regional ecosystem.

Replication principle: keep the core method identical, but adapt the actors, services and financing to the regional context.

The table below summarises the core elements of the SustainX One Stop Shop model and explains how they can be transferred to another regional ecosystem. It shows what was tested within SustainX and what a replicating organisation should put in place in order to preserve the logic of the model while adapting it to local conditions.

Core element	What SustainX did	What a replicating organisation should do
Institutional anchor	The OSS is anchored by TUIASI, with DIZ as ecosystem and SME-support partner.	Select one organisation responsible for coordination, quality, data collection and continuity.
Dual operating track	A SustainX-aligned track supports mapped SMEs; an open track serves wider regional SMEs.	Keep one track for project/prioritised SMEs and one open track for any SME that needs support.
Six service pillars	Funding, R&D, regulatory, market access, digital/AI and skills services are organised as a single catalogue.	Map which local actors can deliver each pillar and start with the pillars where capacity already exists.
SME journey	All SMEs pass through intake, diagnosis, service matching, active support, network integration and follow-up.	Use one common intake form and one case-management workflow for all SMEs.
Sustainability logic	Project funding supports setup; open-track services, institutional support and partnerships support continuation.	Create a realistic continuation model before the end of the project period.

C. MINIMUM REPLICATION PACKAGE

The table below defines the minimum elements required to replicate the OSS support system in a new region. It helps organisations understand what needs to be prepared before launch, what evidence should be kept and how to ensure that the model is operational, even if it starts with a limited number of services.

Component	Minimum requirement for replication	Evidence to keep
Coordinator	Named lead organisation and one named operational contact.	Decision note, email confirmation or signed cooperation note.
Partner pool	Associations, clusters, EDIHs, universities/RTOs, chambers, regulatory experts and funding experts identified.	Stakeholder map and contact log.
Service offer	Simple catalogue based on the six SustainX pillars, even if only 2-3 pillars are active at launch.	Service catalogue, flyer or webpage.
SME intake route	One channel where SMEs can request support and receive an initial diagnosis.	Intake form, list of SMEs supported, anonymised case notes.
Referral mechanism	Process for connecting SMEs to the right expert, lab, programme, partner or funding opportunity.	Referral log and follow-up status.
Monitoring system	KPIs, feedback form and lessons-learned process.	KPI dashboard, feedback summaries, final evaluation notes.

D. ROADMAP OBJECTIVE

This roadmap explains how to replicate what was done in SustainX in a structured way. It starts from the WP3 pilot concept and converts it into a sequence of practical actions: align the actors, adapt the service offer, test the support model with SMEs, collect evidence and prepare continuation.

E. ROADMAP PHASES

The table below presents the main phases of the replication process, from understanding the SustainX model to preparing the regional base, adapting the service catalogue, piloting the model and formalising continuation. Each phase is structured around a clear purpose, guiding question and expected output.

Phase	Purpose	Key question	Main output
Phase 0 – Learn from SustainX	Understand the original OSS logic and decide what should be replicated.	Which parts of the SustainX model are essential and which	Replication scope note.

Phase	Purpose	Key question	Main output
		parts need adaptation?	
Phase 1 - Prepare the regional base	Identify the coordinator, stakeholders, target SMEs and initial service pillars.	Who will coordinate and who will deliver the services?	Stakeholder map and service gap analysis.
Phase 2 - Adapt the service catalogue	Translate the six pillars into a regional service offer.	Which services can be launched now and which should be added later?	Regional OSS service catalogue.
Phase 3 - Pilot the scaled model	Test the model with real SMEs through clinics, diagnostics, referrals or funding sessions.	Does the process work for SMEs and partners?	Pilot activity evidence and SME cases.
Phase 4 - Formalise and continue	Define governance, financing, monitoring and post-project continuation.	How will the model survive after the project period?	Continuation and sustainability plan.

F. SIX-MONTH REPLICATION ROADMAP

The table below provides a practical six-month implementation sequence for organisations that want to replicate or scale the OSS model. It indicates what should be done each month, how activities can be implemented and what evidence should be collected for reporting, monitoring and future improvement.

Month	What to do	How to do it	Evidence to keep
M1	Confirm the replication scope.	Agree whether the region will replicate the full OSS, a satellite access point or a service package linked to an existing hub.	Scope note, meeting minutes.
M1-M2	Map and validate partners.	Use Document 1 to identify associations, clusters, EDIHs, universities/RTOs, chambers, experts and public actors.	Stakeholder map, contact log.
M2	Adapt the service catalogue.	Select 2-3 starting pillars and define simple services,	Regional service catalogue.

Month	What to do	How to do it	Evidence to keep
		responsible actors, eligibility and referral routes.	
M3	Create the SME intake route.	Set up a form, email address, landing page or partner referral route. Use one common intake template.	Intake form, data protection note.
M3-M4	Run validation/outreach activity.	Organise a workshop or information session with partners and SMEs. Present the OSS, collect needs and invite SMEs to intake.	Agenda, attendance list, screenshots, needs summary.
M4-M5	Deliver pilot support.	Provide funding scans, diagnostics, regulatory clinics, R&D matchmaking, digital readiness or market access referrals.	Case log, service delivery notes.
M5	Monitor results.	Track SMEs reached, SMEs supported, services delivered, referrals and feedback.	KPI dashboard, feedback forms.
M6	Decide continuation.	Review evidence, decide governance, financing and next activities after the project period.	Continuation plan and lessons learned.

G. SERVICE CATALOGUE ADAPTATION METHOD

The SustainX OSS uses six service pillars. A replicating region does not need to launch all six at the same time. The practical approach is to begin with the pillars where partners already have capacity and to expand as the network matures.

SustainX pillar	Minimum replication version	More advanced version
EU Funding & Proposal Development	Funding landscape scan and call orientation.	Proposal co-writing, budget support and consortium brokerage.
Technology Readiness & R&D	TRL discussion and referral to a lab/researcher.	Formal TRL assessment, testing report and co-development agreement.

SustainX pillar	Minimum replication version	More advanced version
Regulatory, Certification & Standards	Group clinic or gap discussion.	Individual compliance pathway and certification preparation support.
Market Access & Internationalisation	Market entry discussion and partner signposting.	Cross-border matchmaking, commercial agreement support and IP strategy.
Digital Transformation & AI Readiness	Digital/AI readiness checklist.	AI Act/GDPR gap analysis, Industry 4.0 roadmap and vendor scouting.
Talent, Skills & Capacity Building	Workshop or short training.	Structured academy, mentoring programme and open enrolment training.

H. ROADMAP GOVERNANCE

The table below outlines the key governance roles needed to operate the replicated OSS model. It clarifies the responsibilities of the coordinator, SME navigator, pillar leads, advisory group and monitoring responsible, while also suggesting which type of organisation may be best placed to take each role.

Role	Responsibility in replication	Recommended owner
OSS coordinator	Coordinates roadmap, partner communication, reporting and quality.	Lead university, EDIH, cluster or innovation intermediary.
SME navigator	Receives SME requests, performs intake and routes SMEs to services.	Coordinator or trained partner staff.
Pillar leads	Own service delivery in each active pillar.	Funding expert, RTO, regulatory expert, EDIH, cluster or training provider.
Regional advisory group	Validates regional needs and supports continuation.	Associations, clusters, chambers, public/regional actors.
Monitoring responsible	Collects KPIs, feedback and evidence.	Coordinator or WP5/reporting contact.

I. RISKS AND MITIGATION MEASURES

The table below identifies the main risks that may affect the replication and scaling of the OSS support system. It also proposes practical mitigation measures to help

partners keep the model manageable, ensure partner commitment, respond to SME needs and maintain evidence of progress.

Risk	Why it matters	Mitigation
Too many services launched at once	The model becomes difficult to manage.	Start with 2-3 pillars and expand after the pilot.
Partners agree in principle but do not deliver	SMEs lose trust and evidence is weak.	Assign concrete roles, deadlines and evidence requirements.
SME demand is unclear	Services may not match actual needs.	Use intake sessions and needs validation workshops before implementation.
No continuation model	The OSS stops after project funding.	Define fee, in-kind or institutional support options during the roadmap phase.
Weak monitoring	Impact cannot be demonstrated.	Use the M&E framework from Document 4 from day one.

J. ROADMAP OUTPUTS

The outputs listed below summarise the main results expected from the replication roadmap. They provide a practical checklist for verifying whether the OSS model has been sufficiently prepared, tested and documented for continuation beyond the initial implementation phase.

- Replication scope and governance agreed.
- Regional stakeholder map and partner role matrix completed.
- Regional OSS service catalogue prepared.
- SME intake and referral process launched.
- At least one pilot activity delivered with SMEs and regional partners.
- KPI and feedback evidence collected.
- Continuation decision and sustainability actions documented.

3. CONCLUSIONS

The roadmap confirms that the SustainX One Stop Shop model has strong potential to be scaled and replicated beyond its original pilot context, provided that the core method is preserved and adapted to the realities of each regional ecosystem. The model offers a practical way to simplify SME access to innovation, sustainability,

funding, regulatory, market, digital and capacity-building support through one coordinated structure.

One of the main conclusions is that successful replication does not require copying the exact institutional setup of the SustainX OSS. Instead, each region should reproduce the operating logic of the model: a clear coordination role, a dual-track support approach, a structured SME journey, a service catalogue based on the six pillars and a monitoring process that captures results and lessons learned. This allows the OSS to remain consistent as a model while being flexible enough to respond to local needs.

The roadmap also shows that scaling should be approached gradually. Regions do not need to launch all services at once. A realistic starting point is to activate two or three service pillars where local capacity already exists, such as funding orientation, SME diagnostics, digital readiness support or referrals to research and innovation partners. The service offer can then be expanded as the partner network matures and SME demand becomes clearer.

Another important conclusion is that stakeholder engagement is essential for the OSS to function. Associations, clusters, EDIHs, universities, RTOs, chambers of commerce, public actors, regulatory experts and funding experts all have potential roles in delivering or enabling support. However, collaboration should be based on clear responsibilities, simple referral routes and practical evidence collection, so that the model remains manageable and credible for SMEs.

The document also highlights the importance of governance and post-project ownership. For the OSS to continue beyond SustainX, partners need to clarify who coordinates the model, who receives SME requests, who delivers the active service pillars, who monitors progress and how continuation will be financed or institutionally supported. Without a clear continuation route, the OSS risks remaining a project output rather than becoming a sustainable ecosystem mechanism.

Monitoring and evidence collection are also central to the success of the roadmap. The proposed KPI dashboard, feedback forms, referral logs, case notes and lessons-learned process will help partners demonstrate results, understand SME needs and improve the support offer over time. Strong monitoring will also support reporting and provide a basis for future funding, policy recommendations or institutional continuation.

In conclusion, the SustainX OSS roadmap provides a practical and flexible framework for scaling a coordinated SME support model. By combining institutional anchoring, regional adaptation, partner collaboration, phased implementation and continuous

monitoring, the roadmap supports the transition from a pilot initiative to a sustainable regional or interregional support system. It contributes to the long-term exploitation of SustainX results and strengthens the capacity of regional ecosystems to support SMEs in innovation, sustainability and business transformation.

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