

SustainX

Monitoring and evaluation framework

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 presents the Monitoring, Evaluation and Learning Framework for the replication of the SustainX One Stop Shop (OSS) model under **Task T5.5 – Scaling the One-Stop-Shop localisation support for SMEs**. Its purpose is to provide partners and regional actors with a practical framework for assessing whether the OSS replication process is effective, relevant for SMEs and capable of continuing after project closure.

The framework builds on the SustainX OSS concept developed in WP3 and translates it into a monitoring and learning approach that can be used by regions, associations, clusters, EDIHs, universities, RTOs, chambers of commerce and innovation intermediaries. It does not aim to impose a fixed institutional model, but rather to support the replication of the OSS operating logic: a dual-track SME support model, structured around six service pillars and a common SME journey.

The document defines the core elements that should be preserved during replication, including the need for an institutional coordinator, a relevant partner pool, a clear service offer, a common SME intake route, a referral mechanism and a monitoring system. These elements represent the minimum replication package required to ensure that the OSS model can be implemented in a structured and credible way in different regional ecosystems.

A central part of the framework is the KPI system, which allows partners to monitor stakeholder mobilisation, SME reach, SME intake, service delivery, referrals, outcomes, satisfaction and sustainability potential. These indicators are complemented by practical data collection tools, such as stakeholder maps, SME intake forms, case logs, service delivery logs, referral logs, feedback forms and lessons-learned notes. Together, these tools help partners collect comparable evidence and document the progress of replication activities.

The framework also includes a simple evaluation method and an outcome classification system, allowing partners to assess not only how many activities were implemented, but also what level of progress was achieved by supported SMEs. Outcomes may range from initial awareness and diagnosis to referrals, actionable next steps and concrete results such as proposal ideas, partnerships, compliance actions, pilots or investment preparation.

Finally, the document provides a reporting structure and final learning checklist to support reflection at the end of the replication process. These elements help partners identify what worked, what challenges appeared, which services generated demand,

which partners were most active and what resources or institutional arrangements are needed for continuation. In this way, Document 4 supports both project reporting and long-term learning, helping SustainX partners decide whether the replicated OSS model should continue, expand or be redesigned after the project ends.

Table of Contents

1. SUSTAINX PLAN FOR MONITORING AND EVALUATION	1
A. INTRODUCTION	1
B. MONITORING OBJECTIVE	1
C. MONITORING QUESTIONS	2
D. KPI FRAMEWORK	2
E. DATA COLLECTION TOOLS	3
F. EVALUATION SCORING MATRIX	5
G. FINAL EVALUATION STRUCTURE	5
2. REPLICATION PARTNER IDENTIFICATION AND STAKEHOLDER MAPPING	6
A. INTRODUCTION	6
B. THE SUSTAINX OSS MODEL TO BE REPLICATED	6
C. MINIMUM REPLICATION PACKAGE	7
D. WHY MONITORING IS ESSENTIAL FOR REPLICATION	8
E. EVALUATION QUESTIONS	8
F. KPI FRAMEWORK	9
G. DATA COLLECTION TOOLS	10
H. SIMPLE FEEDBACK FORM FOR SMES	11
I. EVALUATION METHOD	11
J. OUTCOME CLASSIFICATION	12
K. REPORTING STRUCTURE	12
L. FINAL LEARNING CHECKLIST	13
M. EXPECTED OUTPUTS	13
3. CONCLUSIONS	14

1. SUSTAINX PLAN FOR MONITORING AND EVALUATION

A. INTRODUCTION

This document is prepared as part of **SustainX Task T5.5 – Scaling the one-stop-shop localisation support for SMEs**. Its purpose is to define a clear and practical framework for monitoring and evaluating the effectiveness of the OSS scaling process during the final project phase. The document supports partner alignment, implementation follow-up and reporting by providing a common approach to tracking activities, measuring progress, collecting feedback and identifying early results. It covers the **M19–M24 period**, corresponding to the final scaling phase of SustainX, and is intended to help partners understand whether the replicated OSS model is reaching SMEs, mobilising regional stakeholders and creating conditions for continuation beyond the project lifetime.

This document builds on the WP3 One Stop Shop 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, 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. MONITORING OBJECTIVE

This framework defines how SustainX partners can monitor and evaluate the effectiveness of the OSS scaling process under T5.5. It combines implementation indicators, service-use indicators and early outcome indicators, while remaining realistic for the M19–M24 timeframe.

C. MONITORING QUESTIONS

The monitoring questions provide a structured way to evaluate the scaling process from different perspectives. They help partners move beyond simple activity counting and assess whether the scaled OSS responds to real SME needs, reaches the right stakeholders, delivers useful support, creates active partnerships and offers potential for continuation after SustainX. These questions should guide both the collection of evidence and the interpretation of results during the final evaluation.

Evaluation dimension	Key question
Relevance	Does the scaled OSS respond to real needs of SMEs and regional ecosystems?
Reach	How many SMEs and stakeholders were informed, engaged or supported?
Effectiveness	Did SMEs receive useful support, referrals or service matching?
Partnership	Did associations, clusters or hubs actively contribute to the scaling process?
Sustainability	Can any elements continue after SustainX ends?
Replication	Can the model be used by other regions or partners with limited adaptation?

D. KPI FRAMEWORK

This section presents the key performance indicators that will be used to monitor the implementation and effectiveness of the OSS scaling process. The KPI framework combines quantitative indicators, such as the number of partners mapped or SMEs reached, with practical evidence of engagement, service delivery, referrals and continuation actions. The indicators are designed to be simple enough for partners to track during the M19–M24 period, while still providing meaningful evidence for reporting and decision-making.

KPI	Definition	Target/monitoring approach	Evidence source
Partners mapped	Number of associations, clusters	Track longlist and shortlist.	Stakeholder mapping table

KPI	Definition	Target/monitoring approach	Evidence source
	and ecosystem actors identified.		
Partners engaged	Number of actors contacted or involved in discussions.	Track meetings/emails and confirmed interest.	Email records, meeting notes
Partners confirmed	Number of actors agreeing to outreach, referral, co-delivery or access point role.	Monitor signed/confirmed collaboration roles.	Confirmation email, MoU, meeting minutes
SMEs reached	Number of SMEs informed about the scaled OSS support offer.	Count event participants, mailing lists where reliable, registrations.	Attendance lists, registration exports
SMEs diagnosed	Number of SMEs completing intake/needs diagnosis.	Track standard intake forms.	Intake forms, diagnostic notes
Support actions delivered	Number of clinics, scans, referrals, expert calls or matchmaking actions.	Track per service pillar.	Support log
Cross-border referrals	Number of SMEs referred to partners, EEN/NCPs, labs or actors in other regions.	Track referral status and outcome.	Referral log
Continuation actions	Number of actions agreed for post-project continuation.	Track institutional decisions, future events, service continuation.	Continuation plan

E. DATA COLLECTION TOOLS

This section outlines the practical tools that partners can use to collect and organise monitoring information throughout the scaling process. Each tool has a specific purpose, from mapping stakeholders and recording SME needs to tracking support

actions, collecting feedback and aggregating KPI results. Together, these tools create a common evidence base that allows SustainX partners to document activities consistently and compare progress across regions.

Tool	Purpose	Owner	Frequency
Stakeholder mapping table	Record potential partners and collaboration roles.	DIZ/TUIASI + regional partners	Updated monthly
SME intake form	Capture needs, TRL, funding readiness, regulatory gaps and preferred support.	OSS navigator / local contact	For each SME
Support and referral log	Track services delivered and follow-up actions.	OSS team	After each support action
Activity report template	Document each workshop, clinic or matchmaking activity.	Activity organiser	After each activity
Feedback form	Collect SME and partner satisfaction and improvement needs.	Activity organiser	After each activity
KPI dashboard	Aggregate monitoring data for reporting and management decisions.	WP5 coordination	Monthly / final

The feedback questions are intended to capture the views of SMEs, partners and ecosystem stakeholders involved in OSS scaling activities. They focus on the relevance of the support offer, the usefulness of the service pillars, the identification of concrete next steps and the potential interest in follow-up support. This section ensures that the evaluation includes direct input from the organisations targeted by the OSS, not only internal project reporting data.

Question	Response format
How relevant was the OSS support offer for your organisation?	1-5 scale
Which OSS service pillar is most relevant for your next step?	Multiple choice: Funding / R&D / Regulatory / Market / Digital-AI / Skills
Did the session help you identify a concrete next step?	Yes / Partly / No
Would you be interested in follow-up support or referral?	Yes / No / Maybe
What type of support would be most useful in the next 3-6 months?	Open text

Question	Response format
Would your organisation recommend the OSS support model to other SMEs or members?	1-5 scale

F. EVALUATION SCORING MATRIX

Area	Low progress	Medium progress	Strong progress
Partner mobilisation	Only mapping completed.	Partners contacted and some interest confirmed.	Partners actively support outreach, referral or co-delivery.
SME engagement	SMEs informed only.	SMEs attend activities and express needs.	SMEs complete intake and receive tailored follow-up.
Service delivery	OSS model presented.	At least one service piloted.	Multiple service pillars activated with documented support actions.
Interregional scaling	No cross-border links activated.	Potential referrals identified.	Concrete cross-border referrals or co-delivery cases documented.
Sustainability	No continuation action defined.	Continuation options discussed.	Clear continuation roles, partners or activities agreed.

G. FINAL EVALUATION STRUCTURE

This section proposes a common structure for the final evaluation of the OSS scaling process. It indicates the main content that should be included in the final assessment, such as implemented activities, KPI results, lessons learned and recommendations for continuation. The structure is intended to help partners transform monitoring data into a clear final narrative on what was achieved, what challenges were encountered and how the OSS model can be sustained or replicated further.

Section	Content to include
Executive summary	Main results, key numbers and overall conclusion on scaling effectiveness.
Activities implemented	Description of partner engagement, workshops, clinics, referrals and support actions.

Section	Content to include
KPI results	Aggregated results against the KPI framework.
Lessons learned	What worked, what was difficult and what should be improved.
Continuation recommendations	Actions to keep the OSS support system active after project closure.

2. REPLICATION PARTNER IDENTIFICATION AND STAKEHOLDER MAPPING

A. INTRODUCTION

This document is prepared as part of SustainX Task T5.5 – Scaling the One-Stop-Shop localisation support for SMEs. Its purpose is to provide a practical framework for measuring whether the SustainX OSS replication process is effective, useful for SMEs and capable of continuing after project closure. The document is intended for SustainX partners, regional associations, clusters, EDIHs, universities, RTOs, chambers of commerce and innovation intermediaries that wish to replicate or adapt the OSS model in their own ecosystem. It should be used as a working guide for collecting evidence, applying monitoring tools, assessing results, documenting lessons learned and identifying continuation opportunities. The model replicated through this framework is the SustainX One Stop Shop: a dual-track SME support model structured around six service pillars and a common SME journey.

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.

This section introduces the core elements of the SustainX One Stop Shop model that should be preserved during replication. The objective is not to copy the original institutional structure exactly, but to reproduce its operating logic in a way that fits another regional ecosystem. The table below explains which elements form the foundation of the model and how a replicating organisation can adapt them locally while maintaining consistency with the SustainX approach.

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

This section defines the minimum elements required for a region or organisation to replicate the SustainX OSS model in a credible and operational way. It identifies the basic components that should be in place before implementation starts, including a coordinator, partner pool, service offer, SME intake route, referral mechanism and monitoring system. The purpose of this package is to make replication realistic and manageable, especially for organisations that may start with limited capacity and gradually expand their OSS 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,	Stakeholder map and contact log.

Component	Minimum requirement for replication	Evidence to keep
	regulatory experts and funding experts identified.	
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. WHY MONITORING IS ESSENTIAL FOR REPLICATION

Monitoring is not only a reporting requirement. It is the mechanism that shows whether the replicated OSS is useful for SMEs, whether partners are active, which services are most demanded and what should continue after the project period. A region that wants to replicate SustainX should collect evidence from the first outreach activity, not only at the end.

E. EVALUATION QUESTIONS

The evaluation questions provide a structured basis for assessing the OSS replication process. They help partners analyse the model from several perspectives, including relevance, reach, service delivery, effectiveness, partnership and sustainability. These questions should guide the interpretation of monitoring data and support a clear understanding of whether the replicated OSS is delivering value for SMEs and the regional ecosystem.

Evaluation area	Question to answer	Why it matters
Relevance	Does the regional OSS offer respond to real SME needs?	Shows whether the replicated model is adapted to the ecosystem.
Reach	How many SMEs and stakeholders were reached and from which categories?	Shows visibility and inclusion.

Evaluation area	Question to answer	Why it matters
Service delivery	Which services were delivered and by whom?	Shows whether the six-pillar model is operational.
Effectiveness	Did SMEs receive useful support, referrals or next steps?	Shows practical value.
Partnership	Did associations, clusters and other actors actively contribute?	Shows replication capacity beyond the coordinator.
Sustainability	Is there a realistic plan for continuation?	Shows whether scaling can outlast the project.

F. KPI FRAMEWORK

This section presents the key performance indicators that should be used to monitor the progress and effectiveness of OSS replication. The KPIs cover stakeholder mobilisation, SME reach, intake, service delivery, referrals, outcomes, satisfaction and sustainability. They are designed to provide simple but meaningful evidence on whether the replication process is moving from awareness and outreach towards concrete support, follow-up actions and continuation potential.

KPI category	Indicator	Suggested target/interpretation	Data source
Stakeholder mobilisation	Number of associations/clusters/innovation actors mapped.	Demonstrates ecosystem coverage.	Stakeholder map.
Stakeholder mobilisation	Number of partners confirming a role in OSS replication.	Shows operational readiness.	Role matrix, emails, minutes.
SME reach	Number of SMEs reached through communication or events.	Shows outreach capacity.	Attendance lists, mailing/social metrics.
SME intake	Number of SMEs completing intake or diagnosis.	Shows demand for the OSS.	Intake forms, case log.
Service delivery	Number and type of services delivered.	Shows which pillars are active.	Service log.
Referral	Number of referrals to experts, labs, funding	Shows the OSS brokerage function.	Referral log.

KPI category	Indicator	Suggested target/interpretation	Data source
	opportunities, partners or networks.		
Outcome	Number of SMEs with a concrete next step, proposal idea, partnership, compliance action or roadmap.	Shows usefulness beyond awareness.	Case closure notes.
Satisfaction	Average SME feedback score and qualitative comments.	Shows perceived value and improvement points.	Feedback form.
Sustainability	Continuation actions identified or agreements initiated.	Shows post-project potential.	Continuation plan.

G. DATA COLLECTION TOOLS

This section describes the practical tools needed to collect and organise monitoring evidence throughout the replication process. Each tool supports a specific part of the OSS workflow, from stakeholder mapping and SME intake to case management, service delivery, referrals, feedback and lessons learned. Using these tools consistently allows partners to build a reliable evidence base for reporting, evaluation and future improvement of the OSS model.

Tool	When to use	Minimum fields
Stakeholder map	During mapping and validation.	Organisation, type, region, relevant pillar, role, contact, status, priority.
SME intake form	Before diagnosis or service delivery.	Company, contact, sector, need, TRL/readiness, desired support, consent.
Case log	Throughout implementation.	SME ID, need, service matched, expert/partner, status, outcome, follow-up date.
Service delivery log	After each support action.	Date, service type, pillar, responsible actor, SME(s), output delivered.
Referral log	Whenever an SME is connected to another actor.	SME, referred to, purpose, date, status, follow-up.
Feedback form	After events, clinics or 1:1 support.	Relevance, clarity, usefulness, next steps, satisfaction score, suggestions.

Tool	When to use	Minimum fields
Lessons-learned note	After each implementation cycle.	What worked, what did not, what to change, continuation opportunities.

H. SIMPLE FEEDBACK FORM FOR SMES

The SME feedback form is designed to capture the direct experience of companies that interact with the replicated OSS. It focuses on the relevance of the support received, the usefulness of the service, the clarity of next steps and the likelihood that the SME would use or recommend the OSS again. This feedback is important because it shows whether the support offer is understandable, practical and valuable from the perspective of the target group.

Question	Answer format
How relevant was the OSS support for your current business or innovation need?	1-5 scale
Which type of support was most useful?	Funding / R&D / Regulatory / Market / Digital-AI / Skills / Other
Did you receive a clear next step?	Yes / Partly / No
What next step do you plan to take after this support?	Open text
Would you use the OSS again or recommend it to another SME?	Yes / Maybe / No
What should be improved in the service?	Open text

I. EVALUATION METHOD

This section outlines the recommended method for evaluating the OSS replication process. It explains how partners should compile quantitative data, review SME feedback, assess active service pillars, identify concrete outcomes and reflect on lessons learned. The method is intended to transform monitoring data into practical conclusions that can support reporting, decision-making and improvements to the replicated model.

- Compile quantitative data from stakeholder maps, attendance lists, intake forms, case logs, service logs and referral logs.
- Review SME feedback and identify recurring needs, satisfaction levels and improvement points.
- Assess whether the active service pillars were sufficient or whether additional partners are needed.

- Identify concrete SME outcomes: next steps, proposal ideas, partnerships, compliance actions, R&D referrals or market access opportunities.
- Hold an internal learning session with the coordinator and partners to discuss what worked and what should change.
- Prepare a short final evaluation note with results, lessons learned and continuation recommendations.

J. OUTCOME CLASSIFICATION

The outcome classification provides a simple way to describe the level of progress achieved by SMEs supported through the OSS. It distinguishes between basic awareness, diagnosis, referral or support, actionable next steps and concrete results. This approach helps partners show that OSS impact can develop progressively and that even early-stage support can create value when it leads to clearer decisions, better connections or preparation for future action.

Outcome level	Definition	Examples
Level 1 Awareness	- The SME learned about the OSS or a relevant opportunity.	Attended session, received service information.
Level 2 Diagnosis	- The SME need was analysed and matched to a pillar.	Completed intake, received diagnosis note.
Level 3 Referral/support	- The SME received a service or was connected to an expert/partner.	Funding scan, regulatory clinic, R&D referral, digital audit.
Level 4 Actionable next step	- The SME has a clear follow-up action.	Call to apply to, lab meeting, partner discussion, compliance roadmap.
Level 5 Concrete result	- The SME starts a collaboration, proposal, pilot, certification path or investment preparation.	Consortium idea, project concept, formalised partnership, testing plan.

K. REPORTING STRUCTURE

This section proposes a common structure for reporting the results of OSS replication. It helps partners organise information on the regional context, stakeholder mobilisation, SME reach, services delivered, outcomes, feedback, lessons learned and continuation plans. Using a shared reporting structure makes it easier to compare experiences across regions and to demonstrate the added value of the SustainX OSS model.

Section	What to include
Replication context	Region, coordinator, implementation option and active service pillars.
Stakeholder mobilisation	Mapped and confirmed partners, their roles and contribution.
SME reach and support	SMEs reached, SMEs supported, services delivered and referrals made.
Results and outcomes	Concrete next steps, partnerships, proposals, R&D or regulatory actions.
Feedback	SME satisfaction, partner feedback and recurring needs.
Lessons learned	What worked, what was difficult and what should be improved.
Continuation	Planned actions, responsible organisations, resources and timeline after project closure.

L. FINAL LEARNING CHECKLIST

The final learning checklist supports reflection at the end of the replication process. It encourages partners to assess whether the SustainX core logic was maintained, which service pillars generated demand, which partners were most active, what gaps remain and what resources are needed for future operation. The checklist is intended to turn the monitoring process into a learning exercise that can inform both post-project continuation and future replication efforts.

Question	Answer / evidence
Did the replicated model maintain the SustainX core logic?	
Did SMEs understand where to go and what support they could receive?	
Which service pillars generated the strongest demand?	
Which partners were most active and reliable?	
What gaps remain in the regional ecosystem?	
What should be continued, discontinued or scaled further?	
What resources are needed for post-project operation?	

M. EXPECTED OUTPUTS

This section summarises the main outputs expected from the Monitoring, Evaluation and Learning Framework. These include a KPI framework, data collection templates, an outcome classification method, a reporting structure and a basis for deciding whether the replicated OSS should continue, expand or be redesigned. Together, these outputs ensure that Document 4 is not only a monitoring tool, but also a practical resource for learning, improvement and long-term sustainability.

- A KPI framework aligned with the OSS replication logic.
- Templates for collecting stakeholder, SME, service, referral and feedback data.
- A method for classifying outcomes from awareness to concrete results.
- A reporting structure that can be used for T5.5 evidence and post-project learning.
- A basis for deciding whether the OSS replication should continue, expand or be redesigned.

3. CONCLUSIONS

The Monitoring, Evaluation and Learning Framework confirms that the replication of the SustainX OSS model should be assessed not only through the number of activities implemented, but also through the quality, relevance and continuity of the support provided to SMEs. Effective replication depends on the ability of each region to preserve the core operating logic of the OSS while adapting the actors, services and implementation arrangements to the local ecosystem.

A key conclusion is that monitoring must begin from the first stages of replication. Stakeholder mapping, SME intake, service delivery, referrals and feedback should be documented continuously, rather than collected only at the end of the process. This approach allows partners to understand which services are most demanded, which actors are actively contributing and where adjustments are needed to improve the support model.

The framework also highlights the importance of moving beyond awareness-raising towards concrete SME support. While informing SMEs about the OSS is an important first step, the real value of the model is demonstrated when SMEs receive diagnosis, tailored support, referrals, clear next steps or access to relevant partners, experts, funding opportunities, R&D capacities or regulatory guidance.

Another important conclusion is that partnerships are essential for successful replication. No single organisation can deliver the full OSS service offer alone. Associations, clusters, EDIHs, universities, RTOs, chambers of commerce, experts and regional intermediaries all have potential roles in making the model operational. The

strength of the replicated OSS therefore depends on the quality of partner mobilisation and on the clarity of roles within the regional ecosystem.

The framework further shows that sustainability should be considered from the beginning of the replication process. Regions should identify possible continuation mechanisms, responsible organisations, resource needs and future activities before the project ends. This may include institutional anchoring, integration into existing SME-support services, partner co-delivery, regional funding, fee-based services or follow-up activities linked to innovation and sustainability support.

Overall, Document 4 provides a practical basis for measuring, learning from and improving the OSS replication process. By combining KPIs, evidence collection tools, feedback mechanisms, outcome classification and final learning questions, the framework helps partners demonstrate the value of the SustainX OSS model and prepare for its possible continuation beyond the project lifetime. It also supports future replication by other regions that wish to adapt the model to their own ecosystem while maintaining the essential SustainX approach.

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