



CATALISI

Catalysation of institutional transformations
of Higher Education Institutions through
the adoption of acceleration services

REPLICABLE FRAMEWORK OF ACCELERATION SERVICES

*A methodological pathway for institutional transformation in
Higher Education Institutions*

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1. INTRODUCTION

In recent years, Higher Education Institutions (HEIs) across Europe have been recognised for their global leadership in the fields of Research and Innovation (R&I) and called to take on a more active role in driving institutional transformation, making research and innovation more open, inclusive, and aligned with societal needs. This shift is supported by major European policy frameworks such as the European Research Area (ERA) and the European Education Area (EEA).

The CATALISI project, funded under the Horizon Europe programme, supports HEIs in this transition by developing and testing tailored tools and services that foster institutional change. One of the project's key outcomes is the design of a **replicable framework of acceleration services**, a structured and adaptable methodology that guides HEIs in planning, implementing and evaluating strategic institutional transformation processes in R&I.

Acceleration services are designed to facilitate and catalyse the process of HEIs' institutional transformation in the field of Research and Innovation (R&I) and are characterized by an innovative feature that crosses R&I domains. In CATALISI, the 7 identified acceleration services refer to targeted process-oriented services/actions, such as co-creation activities, capacity building, mentoring, peer learning and monitoring, that help institutions move more effectively and efficiently toward their transformation goals.

The **CATALISI replicable framework of acceleration services** offers a systematic way to deploy these services within a broader institutional roadmap, making change both **measurable and sustainable**. As a matter of fact, it provides a structured, adaptable methodology to guide HEIs in achieving institutional transformation in R&I. Its aim is to foster innovation, inclusiveness, and sustainability through stakeholder engagement, capacity building, and collaborative learning, aligned with European priorities.

This report presents the structure, rationale and potential for the uptake of the CATALISI Replicable Framework of acceleration services, designed to be used by individual HEIs, university alliances or intermediary organisations supporting higher education reform.

Overview of CATALISI Acceleration Services

The CATALISI framework is supported by a set of modular acceleration services, structured tools and methodologies that help institutions plan, implement and sustain institutional transformation. These services can be combined and tailored to the specific needs of each HEI.

The full set of acceleration services includes:

- **Living Labs:** participatory, real-world environments where HEIs and stakeholders co-create and test strategies for institutional transformation within selected intervention areas.
- **Transformational Pathways:** a tailored strategic roadmap co-designed with stakeholders to guide each HEI toward effective, time-bound institutional transformation and long-term impact.
- **Counselling:** provides continuous, cross-cutting support through mentoring and coaching, helping HEIs address specific challenges and access guidance throughout all phases of institutional transformation.
- **Predictive Study:** analyses emerging trends and skills needs to help HEIs align curricula and training with future workforce demands, supporting re-skilling, up-skilling, and lifelong learning.
- **Capacity Building & outreach** equips HEIs with skills, methods and tools to drive participatory transformation through mutual learning, knowledge exchange, twinning and tailored webinars on key R&I topics.
- **Communities of Practice:** a collaborative space where HEIs and experts on institutional change share insights, address common challenges and co-develop solutions to support institutional transformation.
- **CATALYST HUB:** connects HEIs with funding opportunities, peer institutions, and industry partners to boost R&D investment and turn research outcomes into real-world impact.

These services are designed to be replicable, scalable and adaptable, making them usable by a wide range of institutions beyond the original project partners.

2. PURPOSE AND ADDED VALUE OF THE FRAMEWORK

The CATALISI replicable framework provides a tested, scalable and flexible approach that supports HEIs to:

- Strategically embed institutional transformation in HEIs.
- Align institutional efforts with EU policy priorities.
- Enable participatory, evidence-based decision making in HEIs.
- Facilitate peer learning and cross-institutional support.

The framework is not a one-size-fits-all solution but rather a **modular and adaptable approach** that HEIs can tailor to their own context, priorities and governance structure. Validated through its pilot application in **seven universities across Europe**, the framework has proven effective in diverse institutional environments and is ready for **transfer and broader uptake**.

3. THE CATALISI STEP-BY-STEP PATHWAY TO INSTITUTIONAL TRANSFORMATION

The framework follows a 5-step pathway that mirrors the journey of an HEI from identifying a transformation need to achieving and sustaining institutional change. Each step is supported by dedicated tools, facilitation strategies and monitoring components.

The **5 steps** are:

1. Defining the strategic intervention area and familiarising with the context and HEI challenges.
2. Designing the transformational pathway through co-creation and engagement.
3. First cycle of implementation and formative evaluation through the Theory of Change approach and SMART KPIs.
4. Second cycle of implementation and strategic integration.
5. Consolidation, sustainability and ensuring transferability.

At the core of the CATALISI replicable framework lies the "Transformational Pathway", a strategic roadmap for institutional change, co-developed with each HEI and key (internal and/or external) stakeholders, and tailored to its local ecosystem. The pathway accompanies the entire process from initial scoping to final evaluation. It is a living document, updated annually, and serves as the foundation for the identification and development of operational action plans and long-term sustainability strategies.

STEP 1: DEFINING THE STRATEGIC INTERVENTION AREA

Before entering this step, a preparatory *onboarding phase* is recommended. This phase helps participants familiarise themselves with the concept of institutional transformation in R&I (including ERA policy actions) and understand the objectives of the process, the level of commitment needed from the HEI and the benefits that transformation brings.

The transformation process then begins with the HEI **identifying one or more strategic intervention areas** within its R&I ecosystem that require change in order to better align with the objectives of the ERA and EEA. Ideally, this process is initiated at **governance level** (e.g. through a designated steering group, strategic transformation task force, or another existing body within the institution's decision-making ecosystem). However, it can also emerge bottom-up, initiated by motivated internal actors or departments.

At this stage, the HEI should define a clear long-term vision, **supported by commitment from staff at all levels** (academic, administrative and leadership). Transformation should be seen not as a one-off project but as a systematic, continuous improvement process embedded within the institution's strategic goals.

The intervention area is selected based on internal reflections, alignment with the institution's mission and policy frameworks and initial consultations with key internal stakeholders (e.g. leadership, governance bodies, departments, faculties). Potential intervention areas may include, for instance, Open Science, Gender Equality, Public engagement, Research integrity, Sustainability as well as other domains identified in EU policy frameworks, such as the ERA Policy Agenda, as priorities for reform and/or improvement to allow European HEIs becoming more competitive globally and strengthen collaboration and cooperation across Europe's R&I landscape.

At this stage:

- The emphasis is on institutional self-assessment and priority setting, using a dedicated **reflection tool**, to align internal goals with ERA/EEA priorities. This marks the first phase of the Transformational Pathway, which begins to take shape based on institutional priorities and the initial self-assessment.
- HEIs also prepare for co-creation processes through the **Living Labs**, where local contexts, challenges and priorities will be analysed collaboratively.

Output: intervention areas for transformation identified; HEI ready to activate its Living Lab process.

Tip box

Involve both **academic and administrative leadership** early in the identification of the intervention area to ensure alignment with institutional priorities and strategic agendas.

STEP 2: DESIGNING THE TRANSFORMATIONAL PATHWAY THROUGH CO-CREATION AND ENGAGEMENT

Following the identification of the strategic intervention area and the mapping of relevant stakeholders across the quadruple helix, the HEI activates its **Acting Living Lab**, a dedicated participatory space where internal and external stakeholders come together to explore, discuss and codesign the institutional transformation process.

Supported by a trained facilitator with expertise in the Living Lab methodology (in CATALISI, provided by the European Network of Living Labs – EnoLL), each HEI is guided through a structured series of co-creation workshops and activities designed to identify and map needs, expectations, concerns and values related to the selected area of change. These activities foster inclusive and trust-based dialogue across institutional boundaries.

This step is the foundation of the transformation process, representing the phase of **co-creation and engagement**. It ensures:

- The meaningful identification and engagement of relevant stakeholders across the **quadruple-helix** (academia, institutional leadership, civil society, public authorities, and industry).
- The mapping of needs, expectations, values and challenges in relation to the chosen R&I area of transformation.
- A shared understanding of the current challenges and opportunities for change.
- The activation of an **Acting Living Lab** as a participatory environment where the HEI and its stakeholders co-design strategies for transformation.
- The development of a shared vision and priorities, leading to the first draft of the **Action Plan**

Each Action Plan is **anchored in a broader strategic roadmap** known as the **Transformational Pathway**, a structured, evolving framework co-developed by HEIs and stakeholders. The Transformational Pathway outlines targeted strategies, actions and milestones for institutional change, sets measurable goals and ensures adaptability through continuous feedback and revision.

This *living document* links operational activities to institutional and policy-level goals, ensuring coherence, continuity, and long-term impact. It is:

- Co-created with stakeholders during Living Lab activities.
- Structured around **short-, medium-, and long-term objectives**.
- Updated regularly to reflect progress, learning and new opportunities.
- Used to guide integration of transformation into governance, funding strategies and institutional missions.

From Dialogue to Action: Co-Designing the Action Plan

One of the main outcomes of this phase is the co-design of **tailored Action Plans** grounded in the participatory process of the Living Labs and directly addressing the collectively identified needs and insights.

The Action Plan's development is further supported by a **Theory of Change (ToC) approach**, helping HEIs clarify their long-term objectives and work backward to define results, medium-/short-term milestones and inputs/outputs, through a structured reasoning process.

The Action Plan should include:

- Clearly defined objectives, challenges and the corresponding actions required to achieve intended outcomes and impacts.
- Specific outputs and implementation steps for each action.
- Identification of assumptions and causal pathways linking actions to expected results.
- Selection of evaluation questions and development of a monitoring plan to assess the effects of interventions and guide indicator selection.
- Adequate SMART Key Performance Indicators (KPIs) to measure progress and performance.
- Timeframes and allocation of responsibilities.
- Alignment with institutional strategies and governance structures, ensuring long-term integration and sustainability.

Outputs: Stakeholder mapping completed; tailored Action Plans designed.

The Acting Living Labs continue to play a central role beyond this initial steps. Together with the other acceleration services, they support HEIs during the **first cycle of Action Plan implementation**. The Living Lab remains an environment for **ongoing reflection, evaluation and refinement** of the Action Plans before entering a second implementation and assessment cycle. This iterative model ensures that institutional transformation remains participatory, adaptive and responsive to change, turning co-creation into a sustained mechanism for continuous improvement.

 Tip box

1. Engage the university's **top-level governance** (e.g. Rector, Vice-Rectors, Heads of Departments, General Director) **from the early stages** of the transformation process. Their involvement ensures strategic alignment, institutional commitment and long-term sustainability of the change.
2. Involve stakeholders based on their **relevance to the current phase** of the transformation and KPIs. Not all actors need to be engaged from the start — tailor participation over time: start with internal academic stakeholders, and progressively involve external actors (e.g. industry, policy makers) as the action plan evolves.
3. **Governance endorsement:** wherever feasible, ensure that the Action Plan is not only well-communicated across the institution but also formally endorsed by the university's governing bodies. This additional step can strengthen ownership and continuity, helping to secure implementation and sustainability regardless of who originally championed the initiative.

STEP 3: FIRST CYCLE OF IMPLEMENTATION AND FORMATIVE EVALUATION

Once the Action Plan has been co-designed, it undergoes a joint evaluation process involving the coordinated input of:

- Stakeholders participating in the Living Lab.
- A designated coordination unit (e.g. governance body, steering committee, or Living Lab group), responsible for ensuring methodological soundness and quality.
- An evaluation and impact assessment facilitator (e.g. UCC within the CATALISI project).
- An External Acceleration Board (EAB), composed of experts in institutional transformation in HEIs.

This collective evaluation process ensures the robustness, feasibility and strategic relevance of the planned actions. The formative evaluation embedded in this phase enables ongoing reflection and real-time learning, allowing lessons emerging during implementation to inform adaptive adjustments and continuous improvement of the Action Plans.

Following validation, the HEI enters the first implementation cycle, guided by the Action Plan's short-term goals, actions and KPIs.

The implementation of the Action Plan is accelerated through a comprehensive set of modular acceleration services, acting as an integrated **support mechanism** for institutional transformation. These services foster knowledge sharing, capacity building and peer learning and include:

- **Webinars** (coordinated by EY): training sessions on specific topics, institutional priorities and good practices. Recordings from the CATALISI series are available on the [Learning Hub](#) and [YouTube](#), providing HEIs with the tools and knowledge to drive sustainable innovation.
- **Mobilisation and mutual learning (MML) workshops** (facilitated by APRE): multi-level exchanges, providing HEIs with practical knowledge, concrete examples and inputs to achieve and manage institutional change over time.
- **Twinning schemes**, (facilitated by APRE), structured exchanges between more and less experienced HEIs to secure the knowledge shared and experience how other peers have already performed specific institutional changes.
- On-demand **counselling** (conducted by EY): tailored methodological and content-related guidance and coaching available throughout all implementation phases.
- **Predictive study on skills anticipation** (conducted by EY): providing foresight and analytical insights to align transformation priorities with evolving workforce and societal needs.
- **Community of Practice** (facilitated by APRE): an online collaborative space for HEIs and experts to share experiences, address challenges and co-develop solutions.
- A [CATALYST Hub](#) (developed by F6S): a digital platform enabling access to funding opportunities, training materials, and partnerships between HEIs, alliances, and SMEs to foster innovation and technology transfer.

These acceleration services are facilitated by experts who ensures both methodological consistency and flexibility. Their **modular nature** allows HEIs to select and activate only those services that best fit their specific transformation needs.

Outputs: First cycle of implemented activities; validated Action Plan; Transformational Pathway under active review.

Formative Evaluation and refinement of the Action Plan

Throughout the first and second implementation cycles, HEIs engage, under the guidance of an **Impact Assessment Facilitator** (UCC in the CATALISI project), in a structured **formative evaluation and impact assessment process**. This ensures that evidence and learning continuously inform adaptation and refinement of the Action Plan. This process aims to:

- Provide real-time evidence to inform decisions regarding reorienting or making changes and improvements.
- Apply qualitative methods grounded in a **Theory of Change** approach.
- Monitor outcomes through co-developed indicators and an indicators' dashboard.
- Continuously update and refine the Action Plan, maintaining alignment with institutional goals and evolving priorities.

Theory of Change and SMART KPIs

The Theory of Change process is built upon several key steps which allow an institution to better understand their long-term strategic goals and build a more robust path to achieve them. The innovative aspect of the Evaluation and Impact Assessment Process undertaken by UCC in CATALISI was in combining this process with the identification of SMART Key Exploitable Results (KPIs) to better monitor these changes. Theory Of Change is fundamental to how implementers conceptualize their transformation agenda to inform their pathways. Furthermore, ToC/Impact/KPI's are fundamental underpinnings of the replicable framework of the acceleration services which CATALISI is aiming to achieve and allow for a better understanding of how these services structure and aid in the institutional transformation processes the implementing partners are aiming for.

The ToC methodology is built around several key steps:

- Identify Long-Term Strategic Goals.
- Identify conditions to have to unfold to allow goals to be met.
- Ensuring that conditions are modelled on desired outcomes.
- Arranging the steps graphically in a causal framework.

In conducting these steps, it is important to ensure that:

- Implementation & Evaluation is transparent.
- Every outcome is defined.
- All outcomes are given one or more indicator of success.
- HEIs collect and analyse data on key indicators to monitor progress on ToC.
- Can adjust refine the model.
- Rationales & Assumptions can be underpinned by research.

This ToC Process is then combined with the identification of SMART KPIs.

The principles informing KPI development are:

1. The must be SMART (Specific, Measurable, Attainable, Relevant and Time based).
2. Outcomes & impacts focused and based on realistic, accessible and reliable data.
3. Strategic in nature as opposed to overly operational.
4. Interconnected and/or cumulative, i.e. will the delivery of one mutually reinforce and support the delivery of another.
5. Leading not lagging i.e. will they bring us closer to the delivery of the change objectives.

The formative evaluation phase is structured into **three steps**:

- **Phase 1:** Introduction to the Theory of Change (ToC) evaluation approach and an initial overview of the Action Plans. This step ensures that goals, milestones, activities, and indicators are consistent with the principles outlined in the evaluation methodology. A **SWOT analysis** is conducted to identify areas for improvement and to map potential solutions to identified challenges.
- **Phase 2:** revision of the Action Plans based on feedback from facilitators and external advisors. The ToC and strategic KPIs are consolidated and refined within each Action Plan. Particular attention is given to the Transformational Pathway, focusing on how actions can be embedded within institutional structures for long-term sustainability. This phase also includes targeted engagement with the Acceleration Services, supporting HEIs in integrating these tools into their ongoing operations.
- **Phase 3:** analysis of the data collected throughout the formative evaluation and production of the final evaluation report. The ToC process is used to assess the positive and negative aspects of the interventions, evaluate progress toward intended impacts, and interpret findings in light of institutional learning.

The objective is not only to assess effectiveness, but also to **promote adaptive learning**, enabling Action Plans to evolve in response to changing circumstances, institutional feedback, and emerging opportunities. By combining the ToC framework with the selection of SMART KPIs, HEIs are equipped with practical tools to better visualise, understand and monitor their strategic transformation.

Outputs: Identification of Strategic KPIs; Monitoring Toolkit to track changes and indicators over time.

 Tip box

Integrate KPIs and evaluation metrics into existing HEI monitoring systems to ensure accountability and adaptability. KPIs should be strategic in nature, avoid operational metrics, should be SMART, interconnected, and bring you closer to the change you want to bring about.

STEP 4: SECOND CYCLE OF IMPLEMENTATION AND STRATEGIC INTEGRATION

Following the evaluation and refinement phase, HEIs enter the **second implementation cycle**, applying their updated Action Plan with revised objectives, actions and timelines. This phase enables institutions to consolidate and scale the changes initiated during the first implementation cycle, moving from pilot actions to more structurally embedded transformations within their own contexts. As in the first phase, implementation is supported by tailored acceleration services.

Strategic Anchoring and Long-Term Vision

To ensure that transformation efforts are sustainable and aligned with institutional missions, each Transformational Pathway should be anchored in broader institutional policies and underpinned by a shared Theory of Change, serving as an Impact Framework. This entails integrating the short-term goals and activities of the Action Plan into the HEI's long-term vision, legacy outputs, mission, governance and resource planning - elements all directed at achieving the intended institutional change.

Accordingly, the Transformational Pathway, which has guided the HEI through all previous steps, is revisited and updated to reflect:

- The progress achieved through the first and second implementation cycles.
- The emerging institutional priorities.
- A clear alignment with long-term goals, governance frameworks and funding strategies.

The Transformational Pathway serves both as a methodological compass and a **sustainability mechanism**, ensuring that change becomes **systemic and strategic**. Its updated version reinforces the institution's vision for transformation and evolves into a governance instrument, aligning strategic vision, institutional planning and resource allocation.

The Acting Living Lab continues to serve as a space for collective reflection and adjustment, while partnerships with other HEIs, SMEs and innovation actors support the scaling and sustainability of the transformation beyond the project's duration.

Outputs: updated Transformational Pathway; Refined Action Plan; Embedding of the Transformational Pathway into broader HEI's policies and strategies.

 Tip box

To reinforce commitment and visibility, consider having the **Transformational Pathway formally signed by a representative of the top-level management** (e.g. Rector, Vice-Rector or Director General). This formalisation can help embed the process institutionally and promote high-level ownership.

STEP 5: CONSOLIDATION, SUSTAINABILITY AND TRANSFERABILITY

The final phase of the CATALISI Replicable Framework focuses on the consolidation of results, the sustainability of institutional transformation and the transferability of the approach to other HEIs and university alliances.

At this stage, HEIs:

- Complete their second implementation cycle.
- Finalise and stabilise internal changes in the Action Plan.
- Reinforce the strategic vision outlined in the Transformational Pathway, integrating it into long-term planning tools and institutional governance structures. As a living document, the Transformational Pathway is updated and becomes a reference framework for ongoing change, helping the institution align with future opportunities, policy developments and funding mechanisms.

A second formative evaluation is conducted at the end of the second implementation cycle. This assessment:

- Reviews the outcomes of the updated Action Plan.
- Analyses institutional progress across intervention areas.
- Generates recommendations to support future replicability and scalability in other HEIs or policy contexts.

The evaluation is integrated with the impact assessment framework, ensuring that lessons learned are translated into actionable insights for future use. This process is supported by the ongoing contribution of the monitoring and impact assessment team (led by UCC in CATALISI), which operates throughout all phases to track progress, capture changes and validate results.

Sustainability is central to the CATALISI framework. Long-term support mechanisms ensure that institutional transformation extends **beyond project's duration**, leveraging collaboration, funding and digital innovation.

To enhance sustainability, institutions are encouraged to:

- Embed transformation goals and actions into **long-term institutional policies** and strategies.
- Maintain peer learning, stakeholder engagement and participatory processes beyond the project's life, through **communities of practice and networks**.
- Strengthen **collaborations and external partnerships**, between HEIs, SMEs, university alliances and innovation ecosystems.

- Continue to access relevant acceleration services or develop internal capacities to replicate them. The CATALYST HUB plays a key role in this regard, offering ongoing access to funding opportunities, training and matchmaking. Its integration with large-scale innovation platforms (e.g. [F6S platform](#), [aUPaEU Agora platform](#)) ensures continuity beyond the project's lifetime, supporting both institutional transformation and broader system-level impact.

Outputs: final version of Transformational Pathway; Evaluation and recommendations for replication.

 Tip box

Use the final evaluation phase to develop a **sustainability roadmap**, identifying long-term funding sources, institutional anchoring points and partnerships that can carry forward the transformation after the project ends.

4. FINAL REMARKS

The CATALISI Replicable Framework is more than a set of tools or steps: it is a transformational approach for HEIs grounded in **capacity building, peer learning, knowledge sharing, co-creation, adaptability, stakeholder engagement and continuous learning**. By combining strategic foresight with operational pragmatism, it empowers Higher Education Institutions across Europe to not only respond to emerging challenges, but to lead systemic change in research and innovation.

Its structured pathway, supported by an institutional Theory of Change, an impact by design approach, targeted acceleration services and collaborative mechanisms such as Living Labs, Mobilisation and Mutual Learning workshops or the CATALYST Hub, ensures that change is not only implemented, but anchored and sustained over time.

The CATALISI framework also demonstrates strong transferability potential:

- It can be adopted by other HEIs and adapted to different organisational and policy contexts.
- It is suitable for use by university alliances, national agencies and EU programmes.
- It provides a ready-to-use methodology for driving institutional transformation in R&I.

The replicable nature of the framework lies in its modularity, flexibility, and demonstrated effectiveness across diverse institutions. As such, it can serve as a valuable tool for scaling Responsible Research and Innovation (RRI) across Europe and beyond.

CATALISI does not propose a one-size-fits-all model. It offers indeed a scalable and actionable methodology that others can adapt, adopt and expand. The path to transformation is not linear, but with the right roadmap, institutions can move forward with clarity, commitment and confidence.