

Terms of Reference (ToR)

Strengthening capacity of the business sector for direct Green Transition

Title	Strengthening the capacity of the business sector for immediate green transformation
Application Deadline	1 April 2024, 5 p.m. CET
Reference	"R&I POLICY making, implementation and support in the Western Balkans" (POLICY ANSWERS)
Contacts	Legal representative: Institute Mihajlo Pupin Project lead, contact for this agreement: Science and Technology Policy Research Centre, cirnt@pupin.rs

1 Introduction and Background

POLICY ANSWERS ("R&I POLICY making, implementation AND Support in the Western Balkans") is a project funded by the European Union's Horizon Europe Research and Innovation programme under grant agreement No 101058873.

It supports policy coordination in and with the Western Balkans as well as with the EC and the EU. 14 partner organisations, representing network nodes in the region and EU expert organisations, support policy dialogue through formal meetings (such as Ministerial, Steering Platform and ad-hoc policy meetings), monitoring and agenda setting, capacity building and implementation of the EU's Western Balkans Agenda, as well as the alignment of thematic priorities. The project implements regional pilot activities, and offers an information hub based on the online information platform westernbalkans-infohub.eu. The partners provide analytical evidence via monitoring and mapping activities of the stakeholder ecosystem, of the implementation of the Western Balkans Agenda and of the Western Balkans' integration into the European Research Area as well as via strategic foresight.

POLICY ANSWERS also allows for tailored and targeted capacity building activities in the Western Balkans as well as regional alignment of priorities in relation to the Green Transition, the Green Agenda and towards Healthy Societies. Pilot activities

provide learning opportunities at policy and programme level and reach out to final beneficiaries related to improved academia-industry cooperation, researchers' mobility, inclusion of youth in policy processes, promotion of research infrastructures and increased innovation skills in all areas. Detailed information about the activities is available at the following website: www.westernbalkans-infohub.eu.

This activity (Strengthening capacity of the business sector for green transformation) takes place in the frame of the targeted capacity building activities (Work Package 3) in Serbia (Task 3.6) which is coordinated by the Institute Mihajlo Pupin (IMP). Detailed information about the activities is available at the project website www.westernbalkans-infohub.eu.

The Green Transition (GT) is a significant global trend that aims at creating a sustainable and environmentally friendly future. In line with this trend, the European Union (EU) has implemented several public policies, including the EU Green Deal, the Green Agenda for the Western Balkans, the Action Plan, and the EU Taxonomy. These policies aim at reducing greenhouse gas emissions, promoting the circular economy, and fostering sustainable growth. As of 2021, Serbia's circular economy readiness index is 17.4 out of 100, indicating the country's need for significant improvement in this area.

Therefore, the purpose of the GT is to explore the relevance and challenges of the Green Agenda for the Serbian economy, including the circular economy, and the impact of the new regulatory framework on the country. One of the primary objectives of the GT is to examine the consequences of the public policies' documents for Serbian companies in the legal, economic, technological, administrative, and financial fields, including their transition towards circular business models.

The GT provides an overview of the circular economy and its "5R principles" (Reduce - Reuse - Repair - Recycle - Recover), enabling businesses to incorporate circular principles into their operations. It will also examine the consequences of the green agenda for supply chains, energy efficiency, non-financial reporting, waste management, and introduce the concepts of industrial symbiosis and carbon accounting, as well as the Digital and the GT. Serbia has implemented various waste management initiatives, including the establishment of waste sorting and recycling facilities, and the closure of illegal landfills. However, there are still challenges to be addressed, such as increasing public awareness and participation in waste reduction and management. In terms of renewable energy, Serbia's target for renewable energy

was to boost its share in the country's overall energy mix to 27% by 2020, and Serbia even surpassed its 2020 target in 2021, reaching a proportion of 40% of electricity from renewable sources.

Sustainable development in Serbia is a significant topic, and the country has made progress in recent years. Serbia has implemented several policies and strategies related to sustainable development, including the National Sustainable Development Strategy, which was adopted in 2008. The strategy aims at promoting economic growth while protecting the environment and ensuring social inclusion.

The green transformation will enable Serbian companies to understand the changes in the legal, economic, technological, administrative, and financial fields and how they can comply with the new regulatory framework. The goal of the GT is to foster sustainable growth and development in Serbia, which is critical for the country's long-term prosperity and well-being.

2 Description of the Scope and Purpose of the Service

This call requests the provision of the services to develop and facilitate a set of five training sessions including educational material that will help companies in the green transformation process.

Scope of the Service

The service should be designed to provide a comprehensive and interactive training workshop titled "Strengthening Capacity of the Business Sector for the Green Transformation", specifically tailored for Serbian micro, small, and medium sized enterprises (MSMEs). The workshop is to be structured into five detailed 60-minute sessions, meticulously focussing on pivotal areas essential for fostering sustainable business operations: understanding the green transformation landscape, circular economy and sustainable practices, energy efficiency and sustainable supply chains, waste management and industrial symbiosis, and the synergistic relationship between digital and green transformation.

The focus should be not only the creation and dissemination of bespoke training materials but also the active engagement of participants through the delivery of the sessions. A significant emphasis should be placed on equipping MSMEs with actionable tools and strategies, enabling the immediate application of green practices within their business models. Furthermore, the service should include a robust evaluation mechanism through participant feedback to gauge the training's impact, supplemented by post-training support to facilitate the practical implementation of the concepts introduced.

Artificial intelligence (AI), such as ChatGPT, should be incorporated to augment the interactive exercises, for identifying areas of improvements of the green and digital transformation. AI technology should be leveraged to provide instantaneous, tailored feedback and insights to participants, enriching their learning experience with relevant examples, strategies, and potential applications tailored to their specific business contexts.

Purpose of the Service

The overarching aim of this service should be to significantly enhance the green competencies of Serbian MSMEs, propelling them towards a swift adaptation to the evolving global sustainability landscape and bolstering their competitive edge on the international stage. Specifically, the training should be designed to:

- Immerse MSMEs in an in-depth exploration of the green transformation, elucidating the multifaceted regulatory, economic, and technological landscape, alongside its direct implications for their operational paradigms;
- Instigate the integration of circular economy principles and sustainable practices through a series of interactive exercises and practical examples, thereby promoting resource efficiency, environmental stewardship, and innovation management;
- Stimulate the adoption of energy-efficient measures and the cultivation of sustainable supply chains via actionable insights, contributing to the reduction of operational costs and environmental footprints;
- Underscore the criticality of adept waste management and the exploration of industrial symbiosis opportunities, paving the way for novel business ventures and collaborative endeavors;
- Illuminate the instrumental role of digital transformation in bolstering green transformation efforts, highlighting practical digital strategies that can streamline and amplify sustainable business practices.

While the previous two training sessions equipped participants with basic green skills and practices, **the new round of workshops aimed at the direct** application of learned concepts, facilitated through a rich tapestry of interactive exercises, real-world case studies, and practical examples. This hands-on approach would ensure that participants can seamlessly translate theoretical knowledge into tangible actions within their business contexts. Moreover, by drawing a clear connection between the green and digital transformation, the service should aim at equipping MSMEs with a holistic understanding of how digitalisation can serve as a powerful enabler of sustainability goals, fostering a dual pathway towards operational excellence and environmental responsibility.

The following work will be carried out by the expert/team of experts:

- Design a learning programme and the corresponding agenda in terms of green transformation for micro, small and medium sized enterprises (MSMEs);
- Facilitate five structured one-day training courses which are tailor-made for Serbian MSMEs enabling the immediate application of green practices within their business models. Training courses will be organised in five different locations in the Republic of Serbia (in different regions, including: Belgrade and Vojvodina);
- Communicate with the staff responsible for the organisation of the training workshop logistics and timely provide them with all required information;
- Prepare presentation materials which will be, ideally, distributed freely under the creative common CC-BY license¹ upon the delivery of the service.

The expert/team of experts is strongly encouraged to develop highly interactive activities, with practical outputs for this service. The expected outcomes of the assignment include development of the actionable plans for energy efficiency, waste reduction and digital transformation initiatives essential for fostering sustainable business operations.

Course overview:

Class 1: Understanding the Green Transformation Landscape (60 minutes)

- **Introduction to Green Transformation (30 minutes):** A brief lecture on the global and local importance of green transformation, the EU Green Deal, and its relevance to the Serbian economy. Brief introduction of the New Regulatory Framework, including the EU Taxonomy and the Green Agenda for the Western Balkans.
- **Interactive Exercise (30 minutes):** Participants break into small groups to discuss and identify the challenges and opportunities green transformation presents for their businesses. This will involve a facilitated brainstorming session, allowing participants to share their perspectives and learn from others.

Class 2: Circular Economy and Sustainable Practices (60 minutes)

- **Introduction to Circular Economy (15 minutes):** Presentation on the principles of the circular economy, focusing on the 5R principles (Refuse, Reduce, Reuse, Recycle, Rot), with examples relevant to the participants' industries.

¹ <https://creativecommons.org/about/cclicenses/>

- **Interactive Card Game (45 minutes):** Participants will use a set of cards representing various circular economy practices. They will select cards that align with potential improvements within their MSMEs, discussing in groups how these practices can be integrated into their operations. This exercise encourages practical planning and peer learning.

Class 3: Energy Efficiency and Sustainable Supply Chains (60 minutes)

- **Overview of Energy Efficiency and Supply Chain Sustainability (15 minutes):** Quick insights into how energy efficiency and sustainable supply chains contribute to green transformation, including the concept of prosumers and the impact on Serbian companies.
- **Energy Efficiency and Supply Chain Improvement Cards (45 minutes):** Using another set of cards focused on energy efficiency measures and sustainable supply chain actions, participants will identify applicable strategies for their businesses. This session includes group discussions on implementation challenges and solutions, facilitating a hands-on approach to conceptual learning.

Class 4: Waste Management, Industrial Symbiosis, and Digital Transformation (60 minutes)

- **Briefing on Waste Management and Industrial Symbiosis (15 minutes):** Explanation of waste management strategies, the benefits of industrial symbiosis, and how these can be applied to enhance sustainability and efficiency.
- **Digital Roadmap for Green Transformation Exercise (45 minutes):** In this session, participants will engage in a guided activity to outline a digital transformation roadmap tailored to their business's green transformation goals. This includes identifying digital tools and technologies that can support sustainable practices, enhance energy efficiency, and improve waste management. Participants will work individually or in small groups to develop a preliminary roadmap, considering their current digital capabilities and future needs.

Note: Use of AI (Artificial Intelligence), such as ChatGPT, would be incorporated into the interactive exercises, enriching the learning experience for participants. By leveraging AI, the participants would learn how to get real-time, personalised feedback and suggestions.

Each class includes a 15-minute introductory lecture followed by a 45-minute interactive exercise.

Target Audience

The priority will be given to Serbian MSMEs which have been partially or fully digital transformed in the past five years across various sectors interested in integrating green practices into their operations. However, the course will be available to all other MSMEs interested in „greening“ their business.

Course Format

- Duration: Four 60-minute classes.
- Mode: Interactive workshops with a mix of lectures, group discussions, and hands-on activities.
- Materials: Presentation slides, case studies, cards for interactive exercises, and digital resources for further learning.

Expected Deliverables

The expert/team of experts will provide:

1. A draft agenda for the training workshops from which it will be clearly understood how the learning outcomes are addressed, delivered by 17 April 2024.
2. The final agreed agenda together with accompanying materials that will be completed upon the input and approval of the contracting institution, by 19 April 2024.
3. The delivery of five in-person workshops between 14 May 2024 and 14 October 2024.
4. A presentation file (ppt) and accompanying materials which can be published on the project website www.westernbalkans-infohub.eu (ideally under the open creative common license CC-BY).
5. The summary report which will describe the carried-out activities, critical observations gleaned from the workshops, and recommendations on how to proceed with capacity building activities related to the topic in English and Serbian.

Please note that the materials used in the framework of this agreement will be published on the project website and, unless otherwise agreed in writing, made available under open creative commons license CC-BY (see <https://creativecommons.org/licenses/by/2.0/>).

Implementation period

The total duration of the engagement is 5 months, starting on 14 May 2024 and finishing on 14 October 2024.

Expected deadlines and tentative timeline

Requested deliverables, outputs and reporting

Draft agenda of the Workshops	17 April 2024
Final agreed agenda	19 April 2024
Delivery of the workshops including digest summary as face-to-face video	14 May 2024 -14 October 2024 in two series: the first series from 14 May - 30 June 2024 and the second series from 1 July – 14 October 2024
Accompanying presentation materials and digest summary of the key steps in GT (ppt)	Within two days from the last workshop
Final report (2 to max. 4 pages long)	30 October 2024

Language

Working language is Serbian.

Quality Assurance

The service provider shall perform the service with reasonable care and skills and in accordance with the best commercial practices and standards in the industry of similar services.

Funding and Reimbursement

The maximum budget includes the service fee, travel and daily allowances for the travel to the events for the workshops as well as VAT and any other taxes and duties. This Service will be funded by the POLICY ANSWERS project. The reimbursement will be issued in two installments. The first installment will be disbursed upon completion of three workshops, while the second installment will follow upon delivery of the remaining two workshops. Anticipated disbursement for the initial installment is by

the end of June 2024, with the second installment scheduled for the end of October 2024.

3 Application, selection and contracting procedure

Required qualification/skills/experiences of the service provider

The contractor Institute Mihajlo Pupin (IMP) is looking for an expert or a team of experts with strong background in GT including pertinent knowledge and demonstrated experience.

In order to achieve the envisaged outcome, this programme should be developed by the experienced expert/team of experts which will fulfil the following criteria:

- 1) Immense practical experience in working with SMEs that have gone through certain or all stages of innovation management and digital transformation in the last five years and thus created a solid foundation to “green” their business. This includes a hands-on approach to problem-solving and strategy implementation within various industries.
- 2) A degree in environmental science, engineering, innovation management, or a related field, with certifications in sustainability, energy efficiency, or digital transformation preferred.
- 3) **Consulting Skills:** Proficiency in business and innovation management consulting tools, with the ability to provide actionable advice and strategies tailored to MSMEs. The trainer should be skilled in using practical consulting tools and methodologies to analyse business operations, identify areas for improvement, and implement effective solutions in innovation management.
- 4) **Management Consulting Experience:** Extensive experience in management consulting, with a proven track record of helping businesses enhance their performance through strategic planning, process improvement, and innovation. The trainer must be adept at applying practical consulting tools to diagnose business issues, develop strategic responses, and guide the implementation of changes that drive sustainable growth and efficiency.

- 5) **Industry Knowledge:** Deep understanding of the challenges and opportunities faced by MSMEs in Serbia and the broader European context, especially regarding green and digital transformation.
- 6) **Communication Skills:** Excellent verbal and written communication skills, with the ability to engage participants and facilitate interactive learning experiences.
- 7) Language requirements: fluent in Serbian and English language.
- 8) **Adaptability:** Ability to adjust the course content and delivery method based on participant feedback and engagement level

Application

The application from the Service Provider shall include the following documents:

- Service fee;
- CVs of expert(s), outlining relevant knowledge and experience as described in the Terms of References, along with contact details;
- Concept note outlining the first draft of the learning programme and proposed timeline for the organisation of the workshops;
- List of references for relevant activities implemented over the past years demonstrating relevant experience in the subject matter.

Submission of application

Applications need to be submitted by 1 April 2024 by 5 p.m. Central European Time to the following address: cirt@pupin.rs.

Selection

The service contract will be awarded to the best qualified bidder based on the relevance of skills and expertise to this assignment.

The best value for price-principle will be applied, thus the following criteria will be taken into account:

- Price;
- Skills;
- Content of the concept note;
- List of references.

The contractor reserves the right not to place any order. Costs for necessary document preparation by the applicants to this call for tender will not be reimbursed.



Contracting procedure for the Service Provider

The selected expert/experts will be informed until 5 April 2024 on the result of the selection procedure. The contract with the Service Provider will be established shortly after the selection and not later than 12 April 2024. The duration of the contract will last from 14 May 2024 until 14 October 2024.