

# Terms of Reference

## Strengthening capacity of business sector for digital skills

Title	Strengthening capacity of business sector for digital skills
Application Deadline	March 2, 2023 until 10 a.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, <a href="mailto:cirnt1@pupin.rs">cirnt1@pupin.rs</a>

### 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.

POLICY ANSWERS supports policy coordination in the Western Balkans and 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 and steering platform and ad-hoc policy meetings), monitoring and agenda setting, capacity building and implementation of the EU's Western Balkan Agenda, as well as the alignment of thematic priorities. The project implements regional pilot activities and offers an information hub based on the [westernbalkans-infohub.eu](http://westernbalkans-infohub.eu) online information platform. 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 digital transformation, the green agenda and towards healthy societies. Pilot activities provide learning opportunities on policy and programme level and reach out to final beneficiaries related to improved academia-industry cooperation, researcher mobility, inclusion of youth in policy processes, promotion of research infrastructures and increased innovation skills in all areas.

This activity (Strengthening capacity of business sector for digital skills) is placed in the frame of the targeted capacity building activities (Work Package 3 of the project) in Serbia (Task 3.6) which is coordinated by Institute Mihajlo Pupin (IMP). Detailed information about the activities is available at the project website [www.westernbalkans-infohub.eu](http://www.westernbalkans-infohub.eu).

Global trends require companies in the industrial sector to transform their business and adapt to the new digital age. A high percentage of Serbian micro, small and medium enterprises (SMEs) are neither familiar with the importance of digital transformation for their operations, nor with the existing digital solutions that can enhance their production. According to the official data provided by the Statistical Office of Serbia, only 15% of the companies employ ICT experts, while that percentage is even lower for small firms (8%). Less than 30% of the companies receive orders (except e-mail orders) via the internet. Regarding the share of the total turnover realised on the basis of orders received via the internet, only 13% of companies achieved more than half of the total turnover via the Internet. On the other side, social networks are increasingly present in the company's operations, where more than 40% of companies use some of the social networks for the company's business needs.

When it comes to the supply side, it is important to emphasise that the market of software and IT services in the Republic of Serbia has reached double-digit growth in the last few years, which can be seen as the beginning of the release of a large, unused potential for the digitalisation of the economy. However, it is necessary to use this potential wisely in the context of the development of the domestic traditional industry.

This Action aims at improving the digital skills required to master digital transitions of the Serbian micro and SME sector. It is aimed at raising the awareness of companies of the need for digital transformation, so as to familiarise them with the existing solutions, and especially with solutions offered by domestic IT companies and the start-up community. It enables the business sector to benefit from advisory services resulting in a clear vision about how they can enhance their competitiveness through digital transformation. The action also envisages establishing contacts with the potential suppliers of digital solutions from the R&D, IT and start-up community. Upon award of the service contract, the contracting institution will share further information.

## 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 5 training sessions including educational material that will help companies in the digital transformation process.

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

- Design of two types of learning programs and the agenda in digital transformation including one for the basic and one for the advanced level. Facilitation of 4 structured 1-day training courses in basic digital skills that will be organised in four different locations in the Republic of Serbia (in 4 regions, including: Belgrade, Vojvodina, Sumadija & Western Serbia and Southeast Serbia)

- Facilitation of 1 structured 1-day training course in advanced digital skills in Belgrade
- Communication with the staff responsible for the organization of the training workshop logistics and timely provide them with all required information
- Co-creation of the learning programme with the IMP team responsible for the organisation of the workshop
- Prepare presentation materials which will be distributed freely under the CC-BY license upon the delivery of the service;

The overall objective of this assignment is to improve the digital skills of micro and SMEs in Serbia in order to adapt to global trends more quickly and become more competitive on the global market. The training sessions should equip participants with sophisticated digital skills and practices, which should facilitate investment in intangible resources and digital technologies.

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 an improved information level and knowledge of the participants in the area of digital technologies, and indications of using the new knowledge to develop and implement digital solutions in their businesses.

In order to achieve the envisaged outcomes two programmes on different levels should be developed by the expert/team of experts:

1) **Basic level programme** for the target group of SMEs that have not started DT yet and are aware of the need to improve their competitiveness through the improvement of business processes, product and service offerings, communication with potential and current customers, increasing profitability and the quality of promotion.

The topics that could be covered at this level of training include:

- Definition of DT: What drives modern companies to implement DT?
- Benefits of Digital Transformation for SMEs
- DT trends and areas of new possibilities for innovation:
  - Products and services improvement*
  - Marketing and customer relations*
  - Employee relations and organizational culture*
  - Business models improvements*
  - Business processes improvements*
  - Creation and implementation of digital road map*
  - Creation and implementation of digital strategy*
- Access to potential sources of financing for DT projects

2) **Advanced level programme** for the target group of SMEs include SMEs that have already digitized certain business functions and wanted to go to the next level.

The topics that could be covered at this level of training include:

- What is ERP (Enterprise Resource Planning) information system?
- Why do SMEs need ERP and what are the benefits of using it?
- What are the ERP modules (DMS, CRM, HRM, BI, SCM, FAM ...)?
- What is Power BI (Business Intelligence) software system?
- Case Study: Features of Power BI module and its benefits
- What is advanced CRM software system and its features benefits?
- Other relevant topics will be considered as added value

### **Expected Deliverables**

The expert/team of experts will provide:

1. A draft agenda of the training workshops from which it will be clearly understood how the learning outcomes are to be addressed.
2. The final agreed agenda together with accompanying materials that will be completed upon the input and approval of the contracting institution.
3. Delivery of 5 in-person workshops from March 25, 2023 to April 30, 2023.
4. Presentation of accompanying materials which can be published on the project website (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.
6. The expert/ team of experts are envisaged to provide a digest summary of the key steps in realization of the DT process in the company in the form of a face-to-face interview which will be recorded and delivered as video material by IMP. The video will be posted on the project's online platforms. The digest summary should be also provided in ppt.

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 2.5 months, starting on March 15, 2023 and finishing by May 31, 2023.

### ***Expected deadlines and tentative timeline***

#### ***Requested deliverables, outputs and reporting***

Draft Agenda of the Workshops	March 17, 2023
Final agreed Agenda	March 22, 2023



Delivery of the workshops including face-to-face video	End of April 2023
Accompanying presentation materials and digest summary of the key steps in DT (ppt)	Within two days from the final workshop
Final report (2 to max. 4 pages long)	May 15, 2023

### *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. This project has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement No 101058873 for the project "R&I POLICY making, implementation and support in the Western Balkans" (POLICY ANSWERS).

## 3 Application, selection and contracting procedure

### *Required qualification/skills/experiences of the Service Provider*

Institute Mihajlo Pupin is looking for an expert or a team of two experts with strong background in digital transformation including knowledge and demonstrated experience.

The expert/team of experts should have a following profile:

- Education: University degree in fields relevant for the assignment.
- Experience:
  - Minimum of 3 years' experience in providing Digital Transformation Training sessions.
  - Proven knowledge in the topic
  - Proven communication skills working with different stakeholders
- Language requirements: fluent in Serbian and English language.

### *Application*

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

- Service fee



- CVs of experts, 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
- 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 March 2, 2023, by 10 a.m Central European Time to the following address: [cirnt1@pupin.rs](mailto:cirnt1@pupin.rs)

### ***Selection***

The consultancy will be awarded to the highest 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 Service Provider***

The selected expert/experts will be informed until March 6, 2023 on the result of the selection procedure. The contract with the Service Provider will be established shortly after the selection. The duration of the contract will last from March 15, 2023 until May 31, 2023.