

Serbia Accelerating Innovation and Growth Entrepreneurship Project

Terms of Reference

Leadership Development and Coaching for RDI Leaders

1. Background

Serbia has received a loan from the World Bank Group for the Serbia Accelerating Innovation and Growth Entrepreneurship Project (SAIGE Project)¹ to support the strengthening of the Serbian Innovation and Entrepreneurship ecosystem. The main objective of the Project is to improve (i) the relevance and excellence of scientific research; and (ii) innovative entrepreneurship and access to finance for enterprise growth, as a way of contributing to Serbia's growth and competitiveness. The European Union Instrument for Pre-accession Assistance (IPA-II) is also providing complimentary financing support for the SAIGE Project. The Project includes the following three components:

Component 1: Research and Development Sector Reforms – Sub-Component 1.1 - The financing of selected competitive programs of the Science Fund, Operationalization of Science Fund, including the strengthening of its corporate governance, and provision of competitive grants to researchers; Sub-Component 1.2 - The design and implementation of institutional transformation plans for Selected RDIs; Sub-Component 1.3 - Capacity building for the AI Institute staff and researchers on AI topics; Sub-Component 1.4 – Support to BIO4, and Sub-Component 1.5 - Establishment of a diaspora facility within the Science Fund.

Component 2: Enterprise Acceleration – Establishment of co-investment fund to provide Matching Grants to Selected Companies that raise an equal or greater private equity; Establishment of AI Matching Grant program.

Component 3: Project Implementation, Monitoring, Capacity Building

The Ministry of Science, Technological Development and Innovation (NITRA, hereinafter: the Client) is responsible for the overall Project coordination, implementation, and execution of Component 1.2 RDI Reforms. The Project is coordinated and implemented by the Project Implementation Unit (PIU) at the Client level, comprising of a PIU Project Manager, project officers for the three Project components, experts for AI, environmental and social standards, monitoring and evaluation (M&E), RDI Reforms advisors and analyst, and other technical and administrative staff.

SAIGE has been extended in 2025 with additional AI (artificial intelligence) financing, and a mandate to support AI-based research and innovation in support of Serbia's commitment to AI

¹ <https://projects.worldbank.org/en/projects-operations/project-detail/P170185> and <https://projects.worldbank.org/en/projects-operations/project-detail/P181485>

development, recognizing the importance of AI, digitalization, and robotics in various sectors, including the economy, healthcare, public services, the environment, etc. specifically focusing on the legal framework, enhancing workforce skills in AI, and improving the regulatory environment, coverage of AI topics in education and research, and the availability of computing power, including support for the AI programs.

The SAIGE Project Additional Financing also aims to scale up the ongoing SAIGE activities and to further enhance innovation capacity through better R&D and entrepreneurship in the areas of Artificial Intelligence (AI) and biotechnology, to increase the country's competitiveness on global markets.

Since January 2022, under Component 1.2 of the SAIGE Project, 18 selected RDIs are undergoing a transformation based on transformation plans (TP) developed from prior assessments conducted by independent international experts; 2 RDI joined the program in 2024. An important part of the transformation process is capacity building of the RDIs which includes topics such as leadership, governance, organizational strategies, management systems, financial and HR systems, R&D management, technology and knowledge transfer, business development, etc., all of which are critical to improving RDIs' research excellence and relevance.

The transformation process is the implementation of the TPs with the support from the PIU and the World Bank, which includes:

- Advisory services for organizational governance, leadership and management;
- Access to experts in specific areas of interest including technology transfer, IP management, strategic planning, outreach planning, etc.
- Training and capability development in specific areas including successful proposal writing and management of Horizon projects (and other competitive R&D programs), HR management, financial planning, data management and study tours in other countries;
- Direct funding to support approved knowledge and technology transfer (KTT) initiatives, like Proof-of-Concept projects, Upgrade Technology Readiness Level (UTRL) projects, as well as seed research grants for young researchers, and related R&D equipment development projects in support of transformation plans.

The transformation process and the SAIGE Project support are tailored to the needs, ambitions and capacities of each RDI individually, considering that RDIs may achieve different levels of fulfillment of their transformation targets, as well as that the process itself on the level of each RDI might require periodical modifications to adapt to a changing environment. The transformation process, its outcomes, and its sustainability depend critically on both the commitment of the RDI to the transformation process and on its ability to achieve expected milestones and outcomes. Additionally, strong networking among participating RDIs is encouraged and assisted by the PIU, to enable peer-learning and increase the sustainability of the achieved outcomes on the level of the RDIs, as well as well-justified inputs for sectoral advancements beyond direct beneficiaries.

2. Objectives of Engagement

The Client seeks to engage a company (hereinafter: the Consultant) to develop and conduct a leadership development and coaching program designed to enhance the leadership capabilities and performance of RDI leaders (Director, Deputy/Assistant Director). Areas of focus should include, but not necessarily be limited to:

- Leadership
- Strategy
- Change & Disruption
- Management
- Team Building
- Collaboration
- Communication
- Private Sector Engagement

The further advancement of the Serbian RDI system depends critically on the ability of RDI leaders to foster the growth and development of their RDIs. The purpose of this program is to enhance the leadership capabilities of these RDI leaders who have historically received limited training of this type. The program should be broadly designed to support learning in a wide variety of leadership areas. It should be designed to provide both group training on leadership skills and individual support including real-time individual coaching as leaders address various challenges within the organization. It is expected that the coaching will start with leaders (Directors, Deputy/Assistant Directors, Transformation Team Leaders) from 6-8 RDIs. Other leaders may be added later based on the efficacy of the program.

The RDIs have diverse backgrounds in thematic and scientific fields and different structures and organization of work, therefore it is expected that a part of the Consultant's support will be tailor-made to address the specific needs and opportunities of each RDI and its leadership.

Specific areas of focus include:

Leadership – Address the role of leadership in an RDI organization. Provide specific examples of modes of leadership in the context of challenging decision environments. Discuss how leadership involves creating an environment for individual and organizational success. Discuss how to foster a culture that supports innovation and entrepreneurship. Also address the importance of emotional intelligence in effective leaders.

Strategy – Address the role of strategy in achieving organizational success. Provide specific examples of how strategy influences decision making including in the context of performance management. Discuss the evolution of strategy in the context of a changing external environment.

Change & Disruption – Address the role of leadership in the context of change and disruption. Describe how effective leaders deal with / respond to challenging external and / or internal environments. Discuss the role of leadership in creating an environment that responds positively

to challenges and changes. Also discuss the role of leadership in managing resistance and leading through transitions/transformations.

Management – Address the role of management in a well-designed organization. Describe the role of management in engaging all staff members in the organizational development process. Discuss the performance management process and its alignment with strategy.

Team Building – Address strategies for building highly effective teams including communication, motivation strategies and alignment strategies. Discuss how to effectively build and maintain these teams.

Collaboration – Address the importance and mechanisms for achieving strong internal and external collaborations. Discuss the role of an Institute leader in designing and supporting strong collaborations. Address approaches for dealing with conflict within a collaborative team.

Communication – Address the importance of good and consistent communication both within an institute and externally. Discuss different approaches to communication and how they can be customized based on personalities and the needs of an organization. Discuss the role of a leader in enhancing internal and external communication within an institute.

Private Sector Engagement – Address the importance of private sector engagement. Discuss the role of the institute leader in designing and enhancing this engagement. Address strategies for building the level of engagement over time and the various types of engagement with the private sector. Discuss how the culture of the private sector is generally quite different than the culture of a research institute and how the institute can adapt its culture to better create private sector engagement.

3. Scope of Work

The Consultant will provide services in two parts to achieve the objectives of engagement as follows:

- **Part I – Leadership Development group training**
- **Part II – Leadership Development individual coaching**

Details of each part are specified below:

I. Leadership Development group training aims to:

- Enhance leadership skills and competencies among participants.
- Strengthen strategic thinking, decision-making, and problem-solving abilities.
- Foster effective communication, collaboration, and team management.
- Develop skills for leading change, innovation, and resilience in dynamic environments.
- Cultivate emotional intelligence and self-awareness to improve leadership effectiveness.

II. Leadership Development individual coaching program aims to:

- Strengthen leadership competencies through personalized coaching.

- Enhance strategic thinking, decision-making, and emotional intelligence.
- Improve interpersonal communication and team leadership skills.
- Foster resilience, adaptability, and innovative leadership approaches.
- Support RDI senior leaders in overcoming professional challenges and achieving their full potential, and full potential of the teams they lead.

Specifically, the Consultant will have the following roles and responsibilities:

I. Leadership Development group training

- Organize initial consultations with the Client to define assignment objectives, scope, and specific requirements.
- Design a detailed training program tailored to the needs of the participants.
- Deliver three in-person trainings of 3-day interactive and engaging training sessions using international best practices and case studies for RDI leaders (Directors, Deputy/Assistant Directors, Transformation team Leaders), including Client staff. In total, it is expected up to 50-60 participants, approx. 15-20 per training session. The training is expected to take place in Serbia, up to 200 km from Belgrade. The Consultant shall provide the venue arrangement acceptable to the Client. The training should employ a mix of methodologies, including interactive workshops and group discussions, case studies and real-world scenario analysis, role-playing and simulation exercises, self-assessments and leadership diagnostics, and action planning for applying learnings in the workplace.
- Provide relevant training materials, including reading materials, presentations, workbooks, exercises, tools and templates to be used by RDI leaders.

II. Leadership Development individual coaching

- Organize initial consultations with the Client to define assignment objectives, scope, and specific requirements.
- Design and deliver a structured coaching program tailored to individual leadership needs. The coaching program should employ a mix of approaches, including one-on-one coaching sessions, leadership assessments and self-reflection exercises, personalized action planning and goal setting, feedback sessions and progress tracking, including peer learning opportunities, where applicable.
- Conduct one-on-one coaching sessions with selected RDI leaders, in-person and virtual.
- Use evidence-based coaching methodologies and assessment tools.
- Provide practical guidance and action plans to enhance leadership effectiveness.
- Monitor progress and offer follow-up support as needed.

The training and coaching will be delivered in Serbian or English. The Consultant is required to familiarize with the RDI transformation process and relevant documents in the inception phase and to coordinate closely with the Client/PIU in development and implementation of tasks. The Client will provide access to all relevant documents.

4. Deliverables and Timelines

- **Inception Report with Action Plan** – a detailed work plan for the assignment with an activity schedule/ milestone, including a Leadership development training plan and detailed methodology for individual coaching – no later than 4 weeks after the Contract signing date.
- **Report on Leadership Development group training** for the leaders (Director, Deputy/Assistant Director) – all training sessions should be delivered no later than 4 months from the Contract signing date. The Report should be submitted no later than 5 months from the Contract signing date. The report should include: a detailed training agenda and methodology, training materials for participants, summary of key outcomes, participant feedback, and recommendations for further development.
- **Report on Leadership coaching**, no later than 12 months after the Contract signing date. The report should include an initial leadership assessment for each participant, a structured coaching plan tailored to individual development goals, short reports on regular coaching sessions conducted, progress reports and feedback for continuous improvement.
- **Final report** - summary report with activities implemented, summary of participants feedback, and recommendations for next steps and future development. The report should be submitted no later than 14 months after the Contract signing date.

<i>Deliverable</i>	<i>Deadline</i>
Deliverable 1 - Inception Report with Action Plan	4 weeks after contract signing
Deliverable 2 - Report on Leadership Development group training	5 months after contract signing
Deliverable 3 - Report on Leadership coaching	12 months after contract signing
Deliverable 4 - Final report	14 months after contract signing

Any change must be previously approved by the Client/PIU.

All products/deliverables and reports produced within the contract will be in English, in electronic and printed form.

5. Experience, Qualifications, and Eligibility

Consulting firm required qualifications:

- Proven track record with at least ten (10) years of general experience;

- At least five (5) years of specific experience and successful completion of at least two (2) assignments in conducting leadership development trainings and coaching with top management.
- Previous work with the public R&D sector and support to research and innovation programs implemented by the public sector institutions is considered a strong advantage.
- Experience in conducting similar assignments on projects financed by the World Bank, European Union, or other international organizations is preferable;

Leadership development trainers (minimum 2 individuals):

- Minimum bachelor's degree in psychology, HR, social sciences, economy or equivalent (MSc preferred);
- At least 8 years of experience in conducting trainings for business, public and/or NGO sector;
- Demonstrated knowledge in developing training curriculum and training materials for leadership development programs;
- Proven experience in delivery of leadership trainings for top management in similar programs and organizations;
- Experience in organizational development, coaching, and capacity building;
- Experience working with R&D organizations (preferably public sector) or sector is considered a strong advantage;
- Previous experience with World Bank/EU/international organizations funded programs is desirable;
- Excellent communication skills and fluency in written and spoken English are required. Fluency in Serbian is considered a plus.

Leadership development coaches (minimum 2 individuals):

- Minimum bachelor's degree in psychology, HR, social sciences, economy or equivalent;
- Minimum of 8 years of practical experience in leadership coaching and executive development;
- Experience in organizational development, coaching, and capacity building;
- Certification in recognized coaching methodologies is considered a strong advantage;
- Experience working with R&D organizations or sector is considered a strong advantage;
- Previous experience with World Bank/EU/international organizations funded programs is desirable;
- Fluency in written and spoken English is required. Fluency in Serbian is considered a plus.

The applicants will be evaluated applying the following evaluation criteria:

#	<i>Criteria</i>	<i>Weight</i>
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1	General experience of the firm	40
2	Specific experience relevant to the assignment	60

6. Reporting, Timeframe and Duration

The Consultant is expected to be engaged for approximately 100 days until the Project Closing Date, i.e., September 30, 2027. Depending on the Client's needs and the Consultant's performance, there is a possibility of increasing the time effort.

All trainings will be conducted onsite, in Serbia. The coaches may perform part of their tasks online, but may also have coaching sessions onsite in Serbia. The traveling cost will be covered under the contract as well as the costs related to venue rental, catering services and printing of training materials.

All reports should be submitted in electronic and printed form in English to the Client/PIU for approval.

7. Confidentiality and Conflict of Interest

The Consultant will maintain confidentiality on all information that is not in the public domain and shall not be involved in another assignment that represents a conflict of interest to the prevailing assignment.