

Serbia Accelerating Innovation and Entrepreneurship Project

Monitoring and Evaluation (M&E) Officer

Terms of Reference

1. Background

Serbia has received a loan from the World Bank Group for the **Serbia Accelerating Innovation and Entrepreneurship (SAIGE) Project** (Project) 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 Project includes the following three components.

Component 1: Research Sector Reforms (€34 million). The Component 1 includes the following three subcomponents.

1. **Subcomponent 1.1: Serbia Science Fund (€22.5 million)** – The *Subcomponent 1.1* will: (a) finance selected competitive programs of the Science Fund (SF), such as basic science grants, applied research grants; and (b) provide technical assistance (TA) for the capacity building and operationalization of the Science Fund, including governance, organizational structure, program design, monitoring and evaluation and other key institutional elements.

2. **Subcomponent 1.2: RDI Reforms (€8 million)** – The *Subcomponent 1.2* will support the design and implementation of institutional transformation plans for selected public research and development institutions (RDIs) focusing on enhancing their excellence and relevance. Interested RDIs will undergo self-assessments done by RDI management, and detailed independent external assessments conducted by a team of international experts. Based on these assessments, detailed transformation plans for selected RDIs will be prepared by the external assessment teams. The project financing support will be linked with the timely achievement of specific milestones specified in the transformation plans.

3. **Subcomponent 1.3: Serbian Diaspora Facility (€3.5 million)** - The *Subcomponent 1.3* will support establishment of a Serbian Diaspora Facility (SDF) within the Science Fund to finance technical assistance and provision of grants to scientists, researchers, entrepreneurs and Serbian diaspora to transfer knowledge and skills from the diaspora community back to the country. More specifically, the facility will leverage the strengths and desire of the Serbian diaspora community to contribute to the research, innovation and entrepreneurship ecosystem in Serbia.

Component 2: Enterprise Acceleration (€7 million). The *Component 2* will support the launch of an enterprise acceleration program at the Innovation Fund (IF). The enterprise acceleration program will consist of two streams: one for early (idea) stage, and the other for growth (scale-up) stage companies. Each stream will serve up to 20 companies per year, selected competitively by participating investors (including angel investors, early stage VC funds, etc.). Companies will receive non-dilutive investment (through a co-financing facility) and TA in negotiating with individual investors or early stage funds, which may be equity-based. The enterprise acceleration program would be structured as follows: (a) Co-Investment Fund to provide Matching Grants for the financing of investments and TA to Selected Companies (up to €4.5–5.5 million); and (b) Technical Assistance Facility (€2 million).

Component 3: Project Implementation, Monitoring, Capacity Building (€1.9 million). The *Component 3* will finance activities related to project implementation and monitoring, including the operations of a Project Implementation Unit (PIU), established at the Ministry of Education, Science and Technological Development (MoESTD) and part of the operating costs of the Central Fiduciary Unit (CFU) at the Ministry

of Finance (MOF). This will also include capacity building support to the Ministry of Education, Science and Technological Development (MoESTD), Science Fund, Innovation Fund and selected RDIs.

Institutional and Implementation Arrangements. The MoESTD is responsible for the overall project coordination and implementation, as well as execution of *Component 1.2 RDI Reforms*. The Science Fund is responsible for the implementation of *Component 1.1 Science Fund and Component 1.3 Serbian Diaspora Facility (SDF)*. The Innovation Fund is responsible for the implementation of *Component 2. Enterprise Acceleration*. The PIU report to the MoESTD State Secretary (Research and Technology) who as Project Coordinator is responsible for coordination of the project with all project implementing entities (PIEs), specifically the SF and IF. The PIU is responsible for all project implementation related activities including technical, operational, environmental and social safeguards, reporting, monitoring and evaluation (M&E), audits, studies, and capacity building, etc. The fiduciary activities related to the procurement and financial management will be handled by the CFU. The PIU staffing will include, inter alia, a Project Manager, Environmental and Safeguards Officer, M&E Officer, MoESTD Project Officer and 3 Project Officers dedicated to PIEs and other staff/experts as needed. More detailed operational procedures, including the division of responsibilities for the Project, are further described in the Project Operations Manual (POM).

2. Objectives of Engagement

The M&E Officer will support SAIGE Project monitoring and evaluation (M&E) by the development and implementation of appropriate M&E system for the target outcomes and outputs. The M&E system will support the successful implementation of the Project by maintaining records on implementation and generating the performance reports focusing on results-based accountability and accomplishments against performance expectations. M&E Officer will assist to MoESTD and PIEs (SF and IF) in SAIGE Project activities implementation by tracking the indicators from the Result Framework that is already in place. This will support progress monitoring and result-oriented Project implementation and impact assessment. In addition to achieving specific goals of individual components and sub-components, there is also focus on achieving broader outcomes and impact that extends across multiple components and has synergetic impact.

M&E Officer will cooperate with the experts/consulting firm in charge to develop M&E framework under the Sub-component 1.2 and who will provide additional support in monitoring and evaluation of the outcomes and impact, by making sure the results of monitoring of the activities are built back into the process of policy development and implementation.

Also, having in mind that the project is improving policy management in STI field, expertise on this task is predominantly analytical. The Smart Specialization Strategy¹ and its Action Plan has emerged as a link between research, economy and innovation, supported with different measures based on national and regional priorities, with the aim of building a comparative advantage, by linking research and innovation forces with the needs of the economy. M&E Officer will, as it's secondary task, support designing and development of M&E framework for Smart Specialization Strategy implementation, and need to secure adequate data which will feed the mechanism and thus will enable institutions involved in strategy implementation to make evidence-based decisions about changes respective to both implementation of on-going measures as well as planning of future ones. M&E Officer will provide analytical support which will secure implementation of Smart Specialization Strategy and continuous Entrepreneurial discovery process (EDP), but also for successful ending of the project and ensuring sustainability beyond the end date.

¹ <https://pametnaspecijalizacija.mpn.gov.rs/wp-content/uploads/2020/09/Smart-Specialization-Strategy-of-the-RS-for-the-period-2020-to-2027.pdf>

As a part of capacity building aspect of the project, M&E Officer will specifically help with development of M&E systems of the MoESTD and PIEs related to the implementation of the project as well as to the implementation of the Smart Specialization Strategy.

3. Scope of Work

The M&E Officer will provide support to the PIU in order to ensure efficient project implementation and timely reporting in compliance with the deadlines listed in the Loan Agreement, Project Appraisal Document (PAD) and Project Operations Manual (POM). The MoESTD, SF and IF as project implementing entities will monitor the Project Development Objective (PDO) and intermediate level indicators for the Project, as well as implementation and outcomes of activities under each Project component. M&E Officer will cooperate with the experts/consulting firm in charge to develop M&E framework under the Sub-component 1.2.

1. Support to the PIU in overall SAIGE Project monitoring and evaluation (M&E) activities by taking the lead in collecting relevant data and tracking relevant indicators to keep the Project Results Framework up-to-date;
2. Develop additional M&E indicators and methodologies relevant to target outcomes and outputs of the SAIGE Project on as needed basis and as requested by the PIU Manager;
3. Participate in capacity building activities on M&E topics of institutions involved in the SAIGE project, in collaboration with World Bank M&E specialists;
4. Data collection for the progress reports and performance reviews as required by the PIU;
5. Prepare of brief summary reports following each progress report and performance reviews describing the efficacy of the Project supported activities;
6. Communication and coordination with the MoESTD and PIEs related the M&E requirements;
7. Support the MoESTD and PIEs responsible for the implementation of their Project Components;
8. In coordination with PIU manager and close cooperation with MoESTD, SF and IF Officers, support designing and development of M&E Framework and System for Smart specialization strategy implementation, analytical support to implementation of Smart Specialization Strategy and continuous EDP in terms of evidence based management;
9. Administrative and technical support to the PIU in implementation of the following tasks:
 - Identification and collection of performance indicators and their hierarchy (KPI - *Key Performance Indicators*);
 - Development of relevant progress reports as required by PIU/MoESTD and World Bank;
 - Participation at the relevant meetings;
 - Perform other duties as required by the Project Manager;
10. Administrative and technical support to other experts/consulting firm in charge to develop M&E and Smart specialization frameworks;
11. The M&E Officer will conduct the work in line with the relevant Project documents including the Loan Agreement, Project Appraisal Document (PAD), Project Operations Manual (POM), Grant Manual, Environmental and Social Management Framework, Stakeholder Engagement plan, Smart specialization strategy and its Action plan.

The M&E Officer will be based at the MoESTD premises within the PIU.

The PIU will provide the requisite office infrastructure.

4. Experience and Qualifications

- Postgraduate academic or professional degree (PhD, master's degree, specialist academic degree, or specialist professional degree);

- Experience in strategic planning and performance measurement, including indicator selection, target setting, reporting, and developing M&E and performance monitoring plans;
- At least 3 years of relevant professional experience in data analytics and project management;
- Experience in implementation of at least one project implemented/funded by the World Bank or other international organisation;
- Extensive knowledge and experience of data bases generating different kinds of reports and analysis, including visual presentations of data;
- Experience in public sector is considered as an advantage;
- Excellent spoken and written Serbian and English;
- Excellent communication, organisation, and teamwork skills;
- Advanced computer skills and the usage of data analytics tools/software (e.g. Tableau) is highly desirable.

5. Timeframe and Duration

The M&E Officer will be engaged on a full-time basis for the duration of the Project with a probation period of 6 months. The current Closing Date of the Project is September 30, 2024.

The engagement will be subject to appropriate extension based on the Project need and performance of the candidate.

6. Reporting Requirements

The M&E Officer will report primarily to the Project Manager. The M&E Officer should prepare monthly activity reports (timesheets) in which he/she will summarise key issues and emerging and day-to-day tasks undertaken. In addition, the M&E Officer will prepare progress and ad hoc reports and documents where so required by the Project. These reports will be provided on paper (when necessary) and online in the English/Serbian language.

7. Terms of Payment

The contract, in the form of the Standard World Bank Time-Based Contract for Small Assignments, will be entered into between the M&E Officer and the MoESTD. Payment for services rendered will be made monthly.