Deliverable 5.2 –
In-house incentive coordination plan

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Main Author	Frederic Renouard
Institution	Université de Rennes 1
E-mail	Frederic.renouard@univ-rennes1.fr
Abstract	This document is deliverable (D5.2) of the EDUC work package 5 (WP5) Task 5.3. Within EDUC, one of the tasks aimed at gathering information about each university's in-house incentive schemes to encourage teachers to work actively on developing innovations in teaching and learning. This allows coordinating and, when possible, adjusting existing instruments such as financial funding, training, teaching load regulations and support services for transformation activities. In this way, resources can be mutualized and better allocated to motivate EDUC teaching collaborations and collaborative content production. This Deliverable is an Action Plan in which local incentive schemes used to motivate teachers for working on pedagogical innovations are identified and described. It

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	is addressed to EDUC's member university boards and central administration units.
Keywords	Human resources, teachers' incentives, benefits, pedagogical innovation, pedagogical cooperation, professional development

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1 Purpose of this document

This document is the Deliverable (D5.2) produced within the EDUC Work Package 5 (WP5) Task 5.3 'Harmonizing in-house incentives to adjust change mechanisms'.

It covers the main outputs of the mentioned Task:
- the definition of a comprehensive common framework for teachers' incentives in EDUC,
- the analysis of existing incentives and of incentives harmonization feasibility at each university,
- the mapping of incentives from the common framework on the EDUC activities and WPs,
- the action plan for incentives implementation in academic-year 2020-21,
- the identification of orientations and potential joint initiatives for 2021+.

Practically, this document will offer to EDUC's member university boards and central administration units:
- a view on the currently available teachers' incentives schemes in the 6 EDUC Universities,
- a presentation of the first pooled teachers' incentives that could be offered since 2020 to serve the first EDUC activities and projects during academic-year 2020-21,
- a proposed action plan including orientations to further develop coordinated teachers' incentives in 2021 (for academic-year 2021-22) and beyond.

2 Summary

How to incentivize people to engage in activities that are consistent with an organization's strategic orientations is a challenge in general. This is even more the case when these people are teachers – having a diversity of research, pedagogical and management tasks to handle, having little room for additional tasks and benefiting from academic autonomy – and when the organization is an Alliance of Universities – with heterogeneous situations and regulations.

As stated in **chapter 3**, this report on Incentives is the result of a Task in EDUC devoted to virtual mobility. Nevertheless, the scope of our work on Incentives goes well beyond the scope of virtual mobility, to cover Incentives for all the overarching objectives of EDUC.

As explained further in **chapter 4**, the work has been undertaken with 2 horizons in mind: (1) short term: i.e. how to orient and improve our Universities Incentives schemes to ensure teachers' engagement in the EDUC-Pilot activities; (2) long term: i.e. how to orient and improve our Universities Incentives schemes in the long run, including beyond the EDUC Pilot.

In **chapter 5**, we explain how we organized our work. Notably why and how we came to adopt an agile and iterative development method, so as to be able to implement quickly a first batch of incentives to serve the first EDUC activities in 2020-21 and also reflect upon longer term orientations for 2021-22 and beyond.

Chapter 6 covers the key design principles we considered for teachers' incentives in the EDUC Alliance context. They are some 'good practices' that emerged while we analyzed the current incentives schemes or designed new ones. Namely:
1. cover all aspects of teachers' motivation,
2. cover all EDUC activities (and EDUC-Pilot),
3. be suitable for joint and collaborative EDUC activities,
4. separate incentive schemes and incentivized activities,
5. enable frugal and scalable economical models,
6. be suitable for multiple funding sources,
7. be suitable for 'flexible harmonization', depending on feasibility.

Chapter 7 is the core part of this Deliverable. It regroups the main outcomes of Task 5.3:
1. the definition of a comprehensive common framework for EDUC incentives,
2. the analysis of existing incentives and of incentives harmonization feasibility at each university,
3. the identification of generic incentivized teachers' roles in EDUC activities,
4. the action plan for incentives implementation for academic-year 2020-21,
5. the identification of orientations and potential joint initiatives for 2021+.

Some obstacles and challenges have been identified in the course of this Task 5.3 implementation that are listed in **chapter 8**. We focus on the obstacles and challenges relating to the '(monetary) HR benefits' category of incentives. We have tried to find workarounds and solutions in some cases. In some other cases, solutions will need to be found at universities, national or European levels.

EDUC reflection on the Incentives includes – on top of the design principles explained in chapter 6 – some mid-term considerations that are grouped in **chapter 9**. They are about:
1. Continuous improvement,
2. Sustainability and economic model,
3. Level of harmonization.

The issues analysed and described in this document need to be handled at political level at EDUC universities. In this respect, EDUC can be seen as an appropriate arena (a 'sand box') to test solutions that universities need to think about while they address major trends (like for instance the recognition of online teaching in teaching services).

3 Objectives and outputs of task

Within the Task resulting in this deliverable, we aimed at (1) gathering information about each university's in-house incentive schemes to encourage teachers to work actively on developing innovations in teaching and learning; (2) coordinating and adjusting existing offers such as financial funding, trainings, teaching load regulations and support services for transformation activities. In this way, resources can be mutualized and better allocated to motivate EDUC teaching collaborations and collaborative content production. Then, the main expected **output** of this Task is **a coordinated incentive-framework where EDUC resources and incentive schemes are pooled and harmonized**, as much as feasible.

Actually, the objective with this Task were set according to 2 horizons:
- **Short term (during the 'EDUC-Pilot'):** Create the context that makes it possible to mobilize teachers on EDUC: to involve them (1) in the EDUC activities (as students' advisors on EDUC programs, as members of workgroups, …) and (2) in the evolution of their teaching through courses transformation projects in the context of EDUC, notably towards virtual mobility.
- **Long term (including 'post-EDUC-Pilot'):** Contribute to the evolution of our universities incentives schemes in ways that are (1) aligned with the strategic objectives of EDUC, based on synergies with our universities' strategies, notably regarding the digital transformation and internationalization of our education; (2) coherent, in a context where we foster cross-universities teachers' cooperation.

4 Design principles

In the course of Task 5.3, guiding design principles – for the EDUC incentives framework – have been defined or have emerged as a result of the running of activities. They are explained below:

1. cover all teachers' motivation levers,
2. cover all EDUC-Pilot activities,
3. be suitable for joint and collaborative EDUC activities,
4. separate incentive schemes and incentivized activities,
5. enable frugal and scalable economical models,
6. be suitable for multiple funding sources,
7. be suitable for 'flexible harmonization', depending on feasibility.

4.1 Cover all teachers' motivation levers

Teachers' motivation is multi-dimensional. For instance, teachers are sensitive to the opportunity of enriching their lessons to the benefit of their students, but they need to free up time to undertake the necessary developments.

There are different ways to free up time for teachers:
- Reduce the teachers' teaching load,
- Provide human resources support to the teachers (dedicated to their project or mutualized).

Hence, the relevance of considering – in a single framework – these different ways to achieve the same goal. It is indeed our aim, with the EDUC common framework of Incentives, to cover all dimensions:
- benefits in the form of extra salary,
- benefits in terms of teaching load reduction,
- professional qualification development and recognition,
- technical/pedagogical support to projects,
- training support,
- mobility support,
- Etc.

4.2 Cover all EDUC-Pilot activities

Many of the activities that are key to EDUC's success rely on teachers' commitment. This is of course true when it comes to the transformation of our courses and programs (towards virtual mobility, internationalization, pedagogical cooperation), but it is also the case when it comes to fostering mobilities in any form, be it physical, hybrid or virtual.

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It is our aim, with the EDUC common framework of Incentives, to cover teachers' commitment in all EDUC activities where such teachers' engagement is key to success. Regarding the EDUC Pilot, we aim at tackling teachers' incentives for the various work packages.

4.3   Be suitable for joint and collaborative EDUC activities

A key objective of harmonizing / coordinating our teachers' incentive schemes is to support joint and collaborative activities within EDUC. In effect, this leads to:
- a clearer and more powerful message to teachers regarding the EDUC Alliance,
- the ability to offer incentives not only at the individual level but also at the level of cross-universities projects,
- the ability to allocate the EDUC support – in the form of incentives – in a balanced way.

4.4   Separate incentive schemes from incentivized activities

From a methodological standpoint, and also for consistency with many Universities' incentive schemes observed, the incentive schemes are separated from the incentivized activities.

A same incentive scheme (e.g., a salary supplement) may be used to incentivize different activities (e.g. teacher's contribution to a virtual mobility project, teacher's role as a student advisor, member of a working group, etc.).
In the same way, the same activity (e.g., teacher's contribution to a virtual mobility project) may be incentivized in different alternative ways (e.g., salary supplement as well as mutualized project support).

This approach offers robustness to take into account new activities in the future. This also gives flexibility to overcome potential roadblocks in implementing some of the incentive schemes locally at a university due to regulatory constraints, by offering different alternatives. For instance, for the same activity, a salary supplement may be replaced by a direct project support.

4.5   Enable frugal and scalable economical models

Even though the EDUC Pilot will see the development of a limited number of projects and activities, it is the goal of the EDUC Pilot to prepare a full-blown deployment of the activities in the future. For instance, if in the EDUC-Pilot, we will deal with the development of 50 virtual mobility courses, we are indeed preparing a massification of the virtual mobility courses in the longer term.

With this in mind, it is essential to give priority to incentive schemes that are frugal and scalable.

For instance, mutualized pedagogical engineering and mutualized technical support solutions could be preferred to the direct funding of additional human resources on projects.

4.6 Be suitable for multiple funding sources

Some of the existing incentive schemes at our universities are funded by different sources (the universities themselves, national or European instruments and projects).

In the context of EDUC, that has to be also the case. Noting that the EDUC funding can be used as a seed funding to test new incentive schemes or orient existing incentives towards the achievement of EDUC Pilot objectives.

4.7 Be suitable for 'flexible harmonization' depending on feasibility

What does harmonization for the teachers' incentives mechanisms in EDUC mean? Different possible harmonization levels along two axes have been identified:
- depending on the incentives' scope (what is incentivized),
- depending on the incentives' mechanisms similarity.

Harmonization of the incentives scope:
- level 1: Having teachers incentivized to contribute to the same **overarching EDUC objectives** in all of our universities: internationalization and mobilities, digital transformation and distant learning, teachers' collaboration. It may be with different incentives mechanisms.
- level 2: Having teachers incentivized to contribute to the same **generic EDUC roles** (as defined in 7.3) in all of our universities: contribution to projects, to communities of practice, as students' advisor on EDUC activities.

In the course of the EDUC pilot, we will go from 'no harmonization' (starting point) to level 1 or 2 depending on the challenges and obstacles (as explained in chapter 8), but also on the a priori benefit-to-cost ratio estimate.

Along this axis, harmonization may be 'flexible' meaning that only a subset of the objectives or roles will be covered and/or only in a subset of the EDUC universities, with a progressive improvement of the coverage over time.

Harmonization of the incentives' mechanisms:
- level 1: Mechanisms kept different in the different universities, but harmonized in scope,
- level 2: Mechanisms made similar across the universities with different parameters (e.g., hourly rate),
- level 3: Mechanisms made similar across the universities with the same parameters or unique mechanism distributed in the EDUC Alliance.

In the course of the EDUC pilot, we will go to level 1, 2 or 3 depending on the incentives' categories, considering the challenges and obstacles (as explained in

chapter 8) and on the a priori benefit-to-cost ratio estimate. For some incentives, notably when they come in the form of monetary benefits (salary supplement), the national laws, regulations and practices may make levels 2 or 3 difficult to achieve or put them even out of reach, at least in the timeframe of the EDUC Pilot.

As above, along this axis, harmonization may also be 'flexible' in the sense that the different EDUC universities may achieve different levels, with a progressive improvement over time.

5 Task outputs

Main outputs of Task 5.3 are:
1. the definition of a comprehensive common framework for EDUC incentives,
2. the analysis of existing incentives and of incentives harmonization feasibility at each university,
3. the identification of generic incentivized teachers' roles in EDUC activities,
4. the action plan for incentives implementation in academic year 2020-21,
5. the identification of orientations and potential joint initiatives for 2021 and beyond.

5.1 Common framework for EDUC incentives

The common framework defines in a structured manner diverse teachers' incentives such as: financial support, training, teaching load reduction and projects support services.

Such common framework is a way to:
- categorize the universities' incentive schemes and the EDUC support according to the kind of value they bring to teachers and to their projects,
- ease the harmonization and/or coordination of the incentives – across our universities – in each category,
- open a door to the coherent mutualization and coordinated allocation of resources for incentives in each category,
- present in a structured way – to teachers and to other stakeholders – the teachers' incentives in the EDUC context.

As explained above, it may not be feasible to offer the same incentives in all universities due to the diversity of the local and national rules and regulations. Our approach aims at designing a common framework of generic incentives for EDUC activities. Such generic incentives will then be transposed / implemented:
- either through the adaptation of local incentive schemes and instruments at each university,
- or through the development of incentive schemes and instruments at the EDUC level.

Some of the generic incentives may also not be considered at all – at least in the context of EDUC – either because their impact is questionable or because their harmonized or coordinated implementation is not feasible.
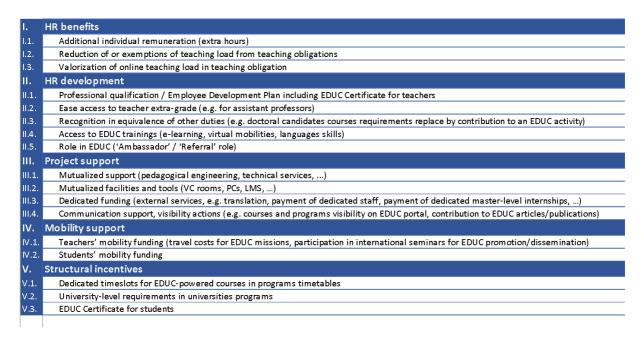
The common framework is organized in 5 main categories of incentives:

Figure 2: EDUC Incentives framework - Categories of incentives.

| HR benefits |
| HR development |
| Project support |
| Mobility support |
| Structural incentives |

Each category of incentive is in turn divided into a couple of generic incentives as listed in figure below.

Figure 3: EDUC Incentives framework – Generic incentives.

I.	HR benefits
I.1.	Additional individual remuneration (extra hours)
I.2.	Reduction of or exemptions of teaching load from teaching obligations
I.3.	Valorization of online teaching load in teaching obligation
II.	HR development
II.1.	Professional qualification / Employee Development Plan including EDUC Certificate for teachers
II.2.	Ease access to teacher extra-grade (e.g. for assistant professors)
II.3.	Recognition in equivalence of other duties (e.g. doctoral candidates courses requirements replace by contribution to an EDUC activity)
II.4.	Access to EDUC trainings (e-learning, virtual mobilities, languages skills)
II.5.	Role in EDUC ('Ambassador' / 'Referral' role)
III.	Project support
III.1.	Mutualized support (pedagogical engineering, technical services, …)
III.2.	Mutualized facilities and tools (VC rooms, PCs, LMS, …)
III.3.	Dedicated funding (external services, e.g. translation, payment of dedicated staff, payment of dedicated master-level internships, …)
III.4.	Communication support, visibility actions (e.g. courses and programs visibility on EDUC portal, contribution to EDUC articles/publications)
IV.	Mobility support
IV.1.	Teachers' mobility funding (travel costs for EDUC missions, participation in international seminars for EDUC promotion/dissemination)
IV.2.	Students' mobility funding
V.	Structural incentives
V.1.	Dedicated timeslots for EDUC-powered courses in programs timetables
V.2.	University-level requirements in universities programs
V.3.	EDUC Certificate for students

5.2   Pre-existing incentives and implementation feasibility

This second output of T5.3, presented below, was produced in 2 steps:
1. identification of the pre-existing incentives at each university, focusing on the 'HR benefits',
2. feasibility analysis of the Incentives identified in the EDUC Incentives framework.

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5.3 Pre-existing incentives at each university

In this section we describe the main incentive schemes pre-existing in the EDUC universities. We focus this analysis on the 'HR benefits', as defined in the common framework for EDUC incentives, when they are destined to foster teachers' engagement towards pedagogical innovation, e-learning, internationalization of courses and pedagogical collaborations.

Pre-existing incentives at University of Cagliari

In 2019, the University of Cagliari issued with Rector's Decree no. 1234 of November 7, 2019, the regulation for a reward fund attributing additional remuneration to professors, researchers and technical-administrative staff.

The Reward Fund is aimed at assigning incentive compensation:

- to professors, researchers and administrative technical staff who have contributed directly or indirectly to the achievement and management of public or private funding;

- to professors and researchers in relation to commitments, additional to those mandatory, in research, teaching and management activities.

The additional remuneration can be paid provided that specific assignments have been given and that no other indemnity or remuneration relating to these assignments has already been recognised.

The assignments must have as their object specific activities, functions or projects that do not fall within the official duties.

The incentives are assigned according to the criteria approved by the Administrative Board.

The incentive remuneration payable annually cannot exceed 50% of the gross annual remuneration of the interested person, even if the same is involved in several projects.

There are two other schemes of incentives currently in use at the University of Cagliari:

1) **Institutional and Educational reward**, in place since 2014, and promoted and managed by the Directorate for Research and Territory.

This incentive scheme recognizes an annual contribution, for research purposes, to teachers and structured researchers who are engaged in assignments related to Study Programme procedures or, more generally, in institutional duties within the university.

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The annual economic incentive is attributed in relation to the institutional and Educational assignments carried out in the reference year, based on the criteria approved by the Administrative Board.

The amount recognized ranges from a minimum of € 1,000 (eg. Erasmus Faculty Coordinator or Member of a Study Programme Self-Assessment Committee) to a maximum of € 3,000 (Director of Department).

2) <u>Economic incentive to encourage the teaching offer in English</u>. These economic incentives are assigned, since the academic year 2016/2017, to those teachers who choose to teach their course in English, thus improving the quality of the educational offer at the University of Cagliari and increasing its attractiveness.

<u>Only the courses included in the annual course catalogue</u> (Bachelor's Degree, Master's Degree, Single-cycle Master's Degree) <u>and which for the first time are taught in English can benefit from the incentives</u> (language courses which are usually taught in English are excluded from this kind of funding).

The remuneration cannot exceed the gross amount of € 50.00 per each hour of face-to-face lesson.

Pre-existing incentives at University of Masaryk

Masaryk University boasts a very stable, considerably decentralized and highly performance-focused system of internal budgeting. This means that the yearly budgets of the faculties/departments are fixed to a great extent by a complex set of performance criteria approved every year by the University Academic Senate and that, as a result, there are several levels of incentivization – university level, faculty level, and department/research centre level – in compliance with the priorities stipulated by the basic strategic documents of the University.

Internationalization being one of the key points of the Long-term Development Strategy of the University and its yearly updates, an important funding is regularly allocated to various aspects of the internationalization process: creation of new study programmes in foreign languages/English, creation of courses in foreign languages, teaching in foreign languages, visiting academics, different types of support to students, academics and non-academics for study/work stays abroad etc.

Such financial support can be distributed to the academics through different schemes: as a general rule, some of the incentives are ad hoc, i.e., depending on the applicant´s success in a specific internal grant call, others become a part of the person´s regular remuneration. Besides the basic salary (which reflects the rank of the academic – assistant, associate professor, professor – and is fixed by the internal wage regulations valid for the whole University and approved in regular intervals by the relevant University authorities), there is an important variable part of the salary falling within the competence of the Heads of the departments/research centres. This part can be considerably different (up to 100 % of the basic salary is not exceptional), and it depends not only on the indicators describing each employee's "performance" in the key indicators that encompass all the aspects of his/her activity (research – grants,

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publications etc., teaching – numbers of teaching hours, students, credits awarded, diploma theses supervised etc.; internalization – courses in English, teaching assignments abroad, etc.; or even public activities), but also – given the decentralisation of the internal budgeting of the University – on the "performance" and consequently on the financial possibilities of each faculty/department/research centre. Such method stimulates not only each employee´s involvement in fulfilling the strategic priorities of the University, but it reinforces also the team spirit of the Faculties and departments/research centres of the University.

The activities above are assessed and taken into consideration in the regular evaluation of the employee development plan.

Pre-existing incentives at University of Nanterre

The internal document procedure title "circulaire de service" describes internal incentives mechanisms at Université Paris Nanterre. This document describes how academic staff can get incentivized while participating into further assignments and/or teaching activities beside service obligation in their faculty or research unit.

This can be done in two different ways with maximum limits :

- teaching hours discharge in the service obligation,
- supplement teaching hours (HETD) paid according to a flat hourly rate.

The number of HETD and modalities are validated by a specific commission composed of representatives of the Presidency of the Université. Decisions of each specific commission are reported once a year, end of January, to the HR department.

Pre-existing incentives at University of Pécs

The University of Pécs examined faculty performance assessment systems at a university level and proposed to integrate the common criteria for internationalization and distance learning into performance assessment systems that otherwise fall under the scope of the faculties. Proposed by the Educational Development Committee the following are now part of the incentives as a category of assessment:

- participation in higher education methodology training,

- participation in e-learning curriculum development,

- participation in international mobility,

- teaching in a foreign language.

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Although the results of the performance assessment systems do include different amounts of additional monetary benefits and varies between faculties, in most cases these amounts are rather symbolic and do not serve as real incentives.

For the teachers of the university, PTE supports the use of Microsoft Teams and Moodle. The colleagues of the IT Department made many instructional videos (available for every teacher in a Moodle course) and provides continuous support to assist the usage of both platforms. In addition to IT support, it is the goal of the university to expand that to a methodological training, as well.

The Institutional Development Plan of the University of Pécs 2021/24 includes the goal of setting up the Digital Learning and Teaching Methodology Center within the Knowledge Center (University Library), which will be responsible for training teachers in pedagogical methodology (online and offline training). It will be a specific task of the Centre to make some course curricula available for distance/digital learning. On a pilot basis, from funds received from tenders, some teachers already prepared courses with distance learning methodology in the 2020 school year. In the autumn of 2020 the results were presented at a conference where participants got to exchange experiences.

Pre-existing incentives at University of Potsdam

At the University of Potsdam incentives for virtual and blended teaching are currently organized on two different levels: the university and the faculty level. Measures at both levels are characterized by the limitations that according to the German Labour and Collective Bargaining Law as well as to the German Civil Service Law, additional remuneration is practically excluded for academic staff. Only in very restricted cases, a performance-based funding scheme could be feasible. Another exception would be academic personnel that is hired part-time. This is generally the case for research associates simultaneously working on a Ph.D. They are mostly employed on the basis of contracts with 50%, 65% or 75% workload. However, also in these cases, additional remuneration is only viable if in accordance with an increase of working hours fitting into the respective legal system.

1. on the university level, two different versions of incentives are practiced:
   a) Calls and Awards with prize money like the annual *E-Learning Award* and the call for *Innovative Teaching Projects* - both initiated by the Vice-president for Teaching and Studying - as well as the *Teaching Award Brandenburg* introduced by the Regional Ministry of Education.
   b) it is possible to apply for a formal recognition of blended and online-teaching scenarios as equivalent to face-to-face teaching as part of the respective teaching load.
2. on the faculty level, small budgets (around 1000 Euro per year) are reserved for funding student assistants and technology costs for smaller e-learning and e-teaching projects (this does apply only to a selected number of faculties). Furthermore, the university is currently in the concept stage of a pilot project that will run at the Faculty of Arts and Humanities. The goal of the project is the

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integration of E-Learning into a performance-based funding scheme for chairs and departments (that are currently measured according to teaching, numbers of graduates and research publications per chair).

Pre-existing incentives at Université de Rennes 1

The main Incentives mechanism at Université de Rennes 1 is based on "Educational responsibility bonuses" ("Prime de Responsabilité Pédagogique" – PRP): when a teacher endorses selected education responsibility, he is eligible to the payment of "additional hours". There is a fixed list of eligible education responsibilities with a fixed number of complementary hours (typically 12 to 48 hours). These additional hours may be funded on university budget or strategic projects budgets (like would be the case of EDUC). In the list of eligible education responsibilities, we currently have:
- piloting international educational projects,
- educational innovation.

To be noted that the translation of a course in English is not specifically supported under this mechanism. The system is currently very constrained, including through ceilings (96 hours per teacher per year).

Another mechanism, launched in Jan 2020, is based on offering an "Educational project leave" for teachers committing themselves to a significant course/program development project. He/she will then be released of his/her teaching obligations for a period of 6 months to 1 year. This mechanism is funded by the French Ministry of HER. A limited number of slots is available (16 for University of Rennes 1 in 2020).

In the list of eligible projects, we currently have:
- setting up of sector, differentiating diplomas,
- creation of modules,
- internationalization of existing sector,
- study and implementation of innovative teaching methods.

It is already stated in the 2020 call for application that: "Careful consideration will be given to the articulation of these projects with those carried transversely across the establishment: EDUC, NCU, EUR, Erasmus".

5.3.1 Incentives implementation feasibility

The implementation of the generic incentives may be envisaged in different ways:
1. adaptation of existing incentives schemes at university level,
2. creation of new incentive schemes at university level,
3. creation of new incentive schemes at EDUC level.

Before going into an action-plan, a feasibility study has been done – at each university – to determine, for each incentive category in the EDUC Incentives framework:
- if the incentive fits into an existing incentive scheme at university, to be adapted?
- which will be the stakeholders in a decision to adapt/create an incentive at university?
- may it be funded by University, by a department/service, by EDUC?

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- what is a feasible implementation timeline?
- what are potential blocking/helping factors?

5.3.2 Main learnings

Main learnings of the existing incentives and feasibility analysis are listed below, grouped by incentive's category. Learnings are about: relative importance of the incentive mechanisms in the EDUC context, feasibility of a coordinated implementation considering obstacles, what can be achieved in the timeframe of the EDUC Pilot.

HR benefits

The **payment of extra hours, bonus or other form or monetary HR benefits** is existing or feasible at most of our universities.
- universities where it is feasible with no major obstacle:
    o based on existing mechanisms UPN, UR, UNICA,
    o based on new mechanism to be developed: PTE, MUNI,
- universities where it is not feasible due to current regulations: UP.
This kind of incentive is extremely valuable in the sense that it is generic enough to incentivize all Teachers' roles (as defined in 7.3), when other incentive mechanisms are more specific (e.g. project support). The funding of these incentives is heavily relying on local and national rules and regulations, and also on EDUC Erasmus funding rules when it comes to EDUC funding.
The possibility to progressively align and coordinate such incentives in the timeframe of the EDUC Pilot is taken into consideration.

Teaching obligations reduction is a strong incentive – maybe the strongest – but is not existing or feasible at all universities, due to current local or national regulations.
- universities where it is feasible with no major obstacle:
    o based on existing mechanisms UPN, UR, UNICA (*),
    o based on new mechanism to be developed: PTE,
- universities where it appears not feasible: UP, MUNI.
(*) In the case of UNICA, it is more a compensation of teaching hours rather than a reduction.
Another way to look at this matter is to offer - to teachers that do not achieve their number of teaching obligation hours - to consider hours worked on EDUC activities to bridge the gap.

Indeed, the ability to free time for teachers to engage into EDUC activities appears as the strongest need. So, there is a need to circumvent the obstacles noted above and consider alternatives in the 'HR Development' or 'Project support' categories, such as project-specific HR funding. Such alternatives are not 'HR benefits' for the teachers but they are a way to offer more resources for their EDUC-related activities.

HR Development

Professional qualification / Employee Development Plan are currently not at the same level of development in our universities:
- PTE: appear to have a sound basis in which teachers' contributions to EDUC activities could be valorized,
- MUNI, UNICA, UPN, UP, UR: require a more important work to first develop a consistent basis in which teachers' contributions to EDUC activities could then be valorized.

This could benefit from a dynamic created through an EDUC Certificate for teachers (also developed within EDUC).

Easing **access to teacher's promotion** (e.g. for assistant professors) through contribution to EDUC activities generally looks not feasible or appropriate. Only mentioned (by UNICA) possible approach is as an element to be included in the assignment of teachers' positions to be announced/published.

Recognition in equivalence of other duties (e.g. doctoral candidate course requirements replaced by contribution to an EDUC activity) is not seen as possible in a majority of our universities due to strict rules on doctoral candidates' activities. Nevertheless, there is potentially a significant benefit in engaging the doctoral candidates in the EDUC activities, one of them being to train the future teachers to the EDUC ways of teaching. An approach could be to have the universities that are able to implement a mechanism targeting doctoral candidates, do an experiment in the context of the EDUC Pilot.

Access to EDUC training (e-learning, virtual mobilities, languages skills) is a no-brainer and a clear goal of EDUC (it is covered through the EDUC Academy).

Formalization of teachers' role in EDUC ('Ambassador' / 'Students' Advisor role) is a possibility in the hands of EDUC. This would be under the control of EDUC and does not have to be formally integrated into the universities' mechanisms.

Project support

Mutualized support (pedagogical engineering, technical services, …) is an important instrument. It is indeed a key way to support teachers' and reduce their own time spent on the EDUC activities. A mutualized approach – as considered in EDUC – is the best way to optimize the use of resources. A good integration of the EDUC resources with the local teachers' support services is a must. It is also key that the EDUC resources work as a tightly integrated network to support teachers' distributed projects and develop a common base of EDUC practices.

Mutualized facilities and tools (VC rooms, PCs, LMS, …) is also perceived as a must to support teachers in their EDUC activities. While some facilities and tools may be

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coordinated at the EDUC level (like the LMS), most have to be handled locally (VC rooms, PCs, …). It is doubtful whether we need – or can reach – significant coordination for these later.

Dedicated funding (external services, e.g. translation, payment of dedicated staff, payment of dedicated master-level internships, …), in the form of direct funding of specific projects, may be necessary to cope with projects specific needs (that cannot be covered by mutualized services) or to circumvent obstacles to HR benefits in some universities. It is unclear at this stage what level of coordination is desirable / achievable. A diversity of funding sources should be considered here, EDUC funding being part of it. Such dedicated funding is heavily relying on local and national rules and regulations, and also on EDUC Erasmus funding rules when it comes to EDUC funding.

Communication support, visibility actions (e.g. courses and programs visibility on EDUC portal, contribution to EDUC articles/publications) is a no-brainer. It will be a must for the courses, programs, pedagogical resources offered in the context of EDUC. This will be the objective of the EDUC online catalogue. In addition to such a course catalogue, other ways to make our contributing teachers more visible could be considered.

Mobility support

Teachers' mobility funding (travel costs for EDUC missions, participation in international seminars for EDUC promotion/dissemination) is generally seen as valuable. A diversity of funding sources should be considered here.

Structural incentives

Dedicated time slots for EDUC-powered courses in program timetables: this topic is important but generally not seen as achievable in the short term. It is addressed in a more general way in the EDUC Guidelines: Cf. sections 3 and 8 of the EDUC Guidelines regarding the integration of virtual mobility courses in programs. This matter is worth further exploration in the rest of the EDUC Pilot.

University-level requirements for universities programs: this topic is important but not seen as achievable in the short term. This matter is worth further exploration in the rest of the EDUC Pilot.

5.4   Generic teachers' roles in EDUC activities

As a way to ease harmonization of the Incentives, we found appropriate to define:
- generic teachers' roles that contribute to EDUC activities and objectives,
- the mapping of these roles on activities in EDUC.

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Incentives are preferably offered in relation to these roles. **The universities and work package leaders have the ability to define additional roles** (e.g., organization-co-organization of research seminars).

Three generic teachers' roles have been identified for EDUC and mapped on the EDUC work packages. They are presented in table below:
- leader or contributor to a teaching innovation project,
- member of a Teachers' Community of Practice,
- students' advisor.

Table 1: Generic teachers' roles in EDUC activities and mapping on work packages.

Generic teachers' role	Description
Leader or contributor to a teaching innovation project (development, execution)	A teacher who is part of a pedagogical team developing a pedagogical project in relation with EDUC objectives (internationalization, e-learning, virtual mobility, pedagogical cooperation)
Member of a Teachers' Community of Practice	A teacher who is part of a Teachers Community of Practice, with goals in relation with EDUC objectives (internationalization, e-learning, virtual mobility, pedagogical cooperation), with a way of working based on practices sharing, co-design of courses, pedagogical resources and guidelines, etc.
Students' advisor	A teacher who is ready to support students in some categories of programs and courses tracks choices, on education matters that relate to all forms of mobilities, physical, virtual, hybrid, long, short.

1.1. Action plan 2020 regarding incentives for academic-year 2020-21

For 2020, the focus has been on first incentives covering the needs of the first EDUC activities running as soon as September 2020, notably the projects on virtual mobilities. They are shown in green and blue in the table below.

Some of these incentives are **implemented at university level**, generally based on an adaptation of existing mechanisms for HR benefits of project support:
- additional individual remuneration (extra-hours, ...): as this is the most versatile incentive scheme, i.e. relevant for all the teachers' roles in EDUC activities.

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- dedicated funding: primarily as a way to circumvent feasibility issues with the additional individual remuneration.

Others have been defined at EDUC level as part of the **projects-support instruments** developed in the context of EDUC:
- access to EDUC training: developed through the EDUC Academy,
- role in EDUC (Ambassador): developed through the EDUC teachers' communities of practice,
- mutualized support: developed through the EDUC methodological guidelines,

Details on these elements may be found in the documentation of the respective Tasks.

Finally, others are being defined in the context of **other EDUC work packages**:
- professional qualification / Employee Development Plan including EDUC Certificate for teachers,
- mutualized facilities and tools (VC rooms, PCs, LMS, ...),
- EDUC Certificate for students.

Details on these elements may be found in the documentation of the respective work packages.

Table 2: Action-plan for EDUC-level incentives implementation in academic-year 2020-21 (in green: in-scope, in grey: out of scope, in blue: dealt-with in another EDUC work package).

		Action-plan 2020 for academic-year 2020-21	
		In scope / out of scope	**Details**
I.	**HR benefits**		
I.1.	Additional individual remuneration (extra hours)	🟩	Experiment through adaptation of existing mechanisms or creation of a new mechanism when feasible (UR1, UPN, MAS, CAG, PEC).
I.2.	Reduction of or exemptions of teaching load from teaching obligations		
I.3.	Valorization of online teaching load in teaching obligation		
II.	**HR development**		
II.1.	Professional qualification / Employee Development Plan including EDUC Certificate for teachers	🟦	As part of EDUC initiatives on administrative harmonization.
II.2.	Ease access to teacher extra-grade (e.g. for assistant professors)		
II.3.	Recognition in equivalence of other duties (e.g. doctoral candidates courses requirements replace by contribution to an EDUC activity)		
II.4.	Access to EDUC trainings (e-learning, virtual mobilities, languages skills)	🟩	As part of EDUC Academy.
II.5.	Role in EDUC ('Ambassador' / 'Referral' role)	🟩	As part of EDUC teachers' communities of practice.
III.	**Project support**		
III.1.	Mutualized support (pedagogical engineering, technical services, ...)	🟩	One EDUC pedagogical engineer per university, all working as a team.
III.2.	Mutualized facilities and tools (VC rooms, PCs, LMS, ...)	🟦	LMS as part of EDUC tools. Other aspects are out of scope.
III.3.	Dedicated funding (external services, e.g. translation, payment of dedicated staff, payment of dedicated master-level internships, ...)	🟩	Local implementations, notably to circumvent obstacles with monetary HR benefits.
III.4.	Communication support, visibility actions (e.g. courses and programs visibility on EDUC portal, contribution to EDUC articles/publications)		
IV.	**Mobility support**		
IV.1	Teachers' mobility funding (travel costs for EDUC missions, participation in international seminars for EDUC promotion/dissemination)		
IV.2	Students' mobility funding		
V.	**Structural incentives**		
V.1.	Dedicated timeslots for EDUC-powered courses in programs timetables		
V.2.	University-level requirements in universities programs		
V.3.	EDUC Certificate for students	🟦	As part of EDUC initiatives on administrative harmonization.

Action plan 2020 at the University of Cagliari

The University of Cagliari considers it strategic to expand the system of incentives activated in previous years (see paragraph 7.4.1 Pre-existing incentives at each university) in order to strengthen and innovate the educational offer and the international collaborations, in line with the transformation goals shared by the University upon joining the European EDUC Alliance. To this end, the governing bodies first approved the Mobility Plan for the academic year 2020/2021, introducing the

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forecast of the total amount of incentives, funded by EDUC, for teaching staff who adhere to the EDUC initiatives, thus contributing to the increase in physical and virtual mobility, to the innovativeness of the teaching provided and to the consolidation of the University's internationalization actions.

Subsequently, the Rectors' Decree n. 125 of March 9, 2021 approved the following scheme of economic incentives envisaged under EDUC:

Activities for which an incentive is recognized	N. hours to be paid for individual teacher
Development of courses related to innovative and international educational projects for the online learning*	from 6 to 48 hours
Participation to the Community of Practice (e-teachers)	12 hours
Participation to the definition and/or management/development of new kind of short mobilities*	from 12 to 24 hours
Recording and/or adaptation of courses to be delivered asynchronously including tutoring and final evaluation	from 6 to 24 hours
Organization and management of Virtual Journal Clubs*	12 hours
Organization or co-organization of international seminars on thematic priority areas *	from 12 to 48 hours

*All incentives are expressed in overall terms: if an activity is carried out by several teachers, it will be divided equally among the members of the group unless otherwise indicated by the leader of the activity who will have to determine the relative percentages of workload. It should be noted that the economic incentives are expressed in hours of commitment. Each EDUC hour is equivalent to the actual hourly cost of each teacher.

Action plan 2020 at the University of Masaryk

The system of internal budgeting/incentives described above in 6.2.1 has already been fully in force in the academic year 2020-21: the role of Masaryk University in various university networks, and above all in the EDUC alliance, being included in the relevant strategic documents of the University, sufficient funding was (2020) and will be (2021) allocated to the activities connected with EDUC, mainly through two internal grant schemes at central level, one of them focused on financial support provided to academics preparing new courses to be offered within EDUC, the other covering all the other activities that may occur within EDUC (pedagogical engineer, summer schools coordination, entrepreneurship activities etc.).

There can also be a system of non-financial support, mostly technical or methodological; the table below gives an incomplete example of the various forms of support:

Objective	Form of support	Level
New courses taught in English	Financial	Central + faculties
New courses with online components	Financial	Central + faculties (Arts, Sports Studies, Economics)
Online contents for courses	Technical (equipment, skilled technical staff)	Faculty of Arts, Fac. of Sports Studies
Teaching strategies and techniques	Training (courses at Masaryk, teaching summer school, etc.)	Faculty of Social Studies

Action plan 2020 at the University of Nanterre

IMPORTANT NOTICE: text here is a draft project not yet validated by the university instances at the time of edition of this document.

The "circulaire de service" was updated in the beginning of October 2020 to make sure that academic staff can get HR benefits while participating in the development of EDUC activities. It has been decided to incentivize only HETD as supplement teaching hours for each assignment of extra teaching activity.

HR benefits regarding the involvement of teachers in developing online courses: we will use the existing incentives scheme for distance learning which is divided into 5 sections:

- EAD (distance learning) 1: Production of online pedagogical resources or blended learning which does not include students' evaluation of the development of a new course using innovative pedagogical tools.
- EAD 2: Production of pedagogical tests and questions.
- EAD 3: Online teaching with the assistance and evaluation of students: pedagogical resources are updated.
- EAD 4: Online teaching with the assistance and evaluation of students: follow-up with students.
- EAD 5: Distance classes with personalized synchronous or asynchronous mandatory homeworks, to be done individually or in group.

The allocation of HETD is different for each section and is calculated taking into consideration the number of teaching hours and a coefficient. The latter is determined by our internal service COMETE in charge of the e-teaching/learning pedagogical development and support.

In addition to the scheme, the EDUC team has developed an additional scheme to retribute specific missions linked to the implementation of EDUC activities. These missions will be allocated to teachers of the university that will be selected on their previous commitment on the subject and/or their interest in the activities. All the positions are now almost confirmed.

The list of teacher task officers ("chargé de mission) is the following:

Type of mission	HETD*
Task officer in charge of the pedagogical implementation of the EDUC gap year (WP8)	24
Task officer in charge of the implementation of an EDUC summer school (WP6) 1 by project	24
Task officer in multilingualism	24
Task officer E-tandem (WP3)	24
Task officer in entrepreneurship (WP10)	24
Task officer in charge of the coordination of distance teaching (2 years) - WP5,6,8,10	24
Task officer : research seminar (WP9) 1 by seminar	24

*as a maximum

Moreover, administrative documents have been developed to support the implementation of task officer:

- a road map which included: the detailed mission, a planning for 2021/2022, expected deliverables, identified needs and points of vigilance. This document will help to follow with the teacher the progress on the mission,
- a mission letter which summarizes the tasks attributed to the teacher as well as the conditions related to his/her involvement (degree of commitment in the university and in EDUC, dates, etc.).

The hours allocated to teachers as task officers are determined by a specific commission once a year. The commission is composed by VP International Relations, VP Europe, VP pedagogical and digital initiatives, VP Education.

Action plan 2020 at the University of Pécs

Apart from EDUC, the University of Pécs has two main initiatives on this domain.
1. During summer 2020 we established the 'Digital Education Development Working Group' at the University, mainly by combining the already existing efforts of the faculties. This Working Group is coordinating a call for teachers for turning their already existing in-class course into blended courses. In this call we supported 10 projects (selected from 74 candidates), primarily for large audiences. The idea is to turn the 'low-activity - large audience' courses into blended / online format. In the next phase, we plan to support 50 projects. As this comes with a huge workload and the personnel working on the support side are mainly in overlap with the EDUC Academy support personnel, we plan to develop a student-run helpdesk. This would come as an obligatory traineeship for students in teacher-training programs. They will receive training from our IT department and from our pedagogical engineers, so they will be able to serve as a 'first contact point' for teachers in the development phase. We also plan to develop our inhouse television channel ('UnivTv') in order to be able to support the multimedia content production for e-learning schemes.
    The supported teachers receive pedagogical and IT support from our experts plus a
    monthly extra financial allowance (HUF 150,000 per month per project).

2. As the autonomy of the faculties are traditionally high in Pécs, many faculties run their own similar schemes.

Action plan 2020 at the University of Potsdam

In order to support the teachers in their first contributions to EDUC in academic-year 2020-21, the specific incentive model of an "eLearning support package" was developed. This package provided financial support for a predefined period of time (around 6 to 7 months) in order to make sure that teachers were able to develop and implement their respective collaborative online teaching project alongside their regular teaching obligation. Teachers were free to choose how to allocate funds between the categories of staff costs for research associates or student assistants, software licenses and honoraries for guest lectures from experts in the respective field of the course. Experience shows that the majority of projects went for additional personnel, either to receive support in developing academic contents, adapting to the didactics of e-Teaching or tackling technical issues.

Besides, teachers were brought together in a local community of practice in order to be introduced to local support centers (e.g. the Center for Quality in Teaching and the Center for Information Technology and Media Management) as well as to profit from each other's experiences. Though this might not be a monetary or sizable incentive, these measures especially addressed the professional and motivational dimension of e-Teaching. Teachers thus got acquainted with the many support infrastructures at the University of Potsdam that were massively extended as a consequence of the

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Coronavirus pandemic. This might inspire scholars to continuously further develop their e-Teaching activities according to the state of the art of now available tools and information technology at the university. Furthermore, the intensive exchange with their colleagues will make teachers feel appreciated for their experiences, competences and knowledge in e-Teaching and for being part of an ever-growing community.

Action plan 2020 at the Université de Rennes 1

In 2020, the focus for Université de Rennes 1 has been to adapt to EDUC the existing 'Prime de Responsabilité Pédagogique' ('PRP') monetary benefit system.

Brief description of the PRP system: The PRP is a French national mechanism which purpose is to incentivize teachers to take responsibilities in pedagogical innovation, internationalization of education, or other duties in relation with education at their university, beyond their teacher obligation. The PRPs are attributed yearly for 1 university year. It takes the form of extra hours paid, depending on eligible activities and local valorization rules. The eligible activities categories are defined at university Board level based on university strategy. Their 'specialization' is possible, for instance for EDUC. Amount per hour and max number of hours are limited by national or university rules.

The adaptation to EDUC consisted in:
- defining specific categories of eligible activities for EDUC,
- defining specific activities valorization rules and allocation decision process.

Also, the EDUC PRP can be attributed individually or spread over a team (project), when the standard PRP can be attributed only individually.

The eligible EDUC activities are:
- member of an EDUC community of practice
- contributor in an EDUC project
- students' advisor for EDUC activities (in 2021-22)

The attribution is done yearly, in September, for 1 academic-year. The list of beneficiaries is proposed by the UR EDUC team. Approval is by an UR Commission, in line with the standard PRP attribution process. The EDUC PRP is funded on the EDUC budget.

Key parameters for the EDUC PRP are as per the following table.

Table 3: Key parameters of EDUC PRP at Université de Rennes 1.

Key parameters	Value
Euros per hour	41 euros per hour net for teacher; 60 euros per hour cost to university
Maximum amount (in Euros) per year per teacher	41 x 96 = 3 936 euros maximum
Maximum number of hours per year per teacher	96 hours maximum per year, in total for all activities of a same teacher (EDUC + non-EDUC)
Typical amount / number of hours per activity	- Member of an EDUC CoP: 12 hours - Contributor in an EDUC project: 12 to 24 hour per person / 24 to 48 hours per team - Students' advisor for EDUC activities (for year 2021-22): to be defined

5.5 Action-plan 2021 regarding incentives for university year 2021-22

In 2021, a first goal will be to **iterate on the Additional individual remuneration schemes** in a continuous-improvement logic - by building on the learnings of the previous year – and in order to reach a next level in coordination and harmonization.

We will also of course **continue with the other (EDUC-level) schemes initiated in the previous year**.

We will **initiate a joint work on the following incentives schemes**:

* In the context of this Task: exploratory work related to:
- reduction of or exemptions of teaching load from teaching obligations,
- valorization of online teaching load in teaching obligation,
- recognition in equivalence of other duties (e.g., doctoral candidates courses requirements replaced by contribution to an EDUC activity),
- university-level requirements in universities programs.

Joint exploratory work will consist in: practices sharing, feasibility analysis, go/no-go/postpone decision, design of a common basis, first experiments.

* In the context of other Tasks in this work package:
- dedicated time slots for EDUC-powered courses in programs timetables: within the Methodological Guidelines.

* In the context of other EDUC work packages:

- communication support, visibility actions (e.g., courses and programs visibility on EDUC portal, contribution to EDUC articles/publications).

Details are presented in the table below.

Table 4: Action-plan for incentives harmonization in university year 2021-22 (in green: in-scope, in light-green: continuation of previous year action, in grey: out of scope, in blue: dealt-with in another EDUC work package).

		Action-plan 2021 for academic-year 2021-22	
		In scope / out of scope	Details
I.	**HR benefits**		
I.1.	Additional individual remuneration (extra hours)		Share practices and results of previous year. Further identify and discuss the obstacles at all levels. Aim at reaching a next step of harmonization.
I.2.	Reduction of or exemptions of teaching load from teaching obligations		Share practices and explore ability to adapt existing mechanisms or create new ones
I.3.	Valorization of online teaching load in teaching obligation		Share practices and explore ability to adapt existing mechanisms or create new ones
II.	**HR development**		
II.1.	Professional qualification / Employee Development Plan including EDUC Certificate for teachers		As part of EDUC initiatives on administrative harmonization.
II.2.	Ease access to teacher extra-grade (e.g. for assistant professors)		
II.3.	Recognition in equivalence of other duties (e.g. doctoral candidates courses requirements replace by contribution to an EDUC activity)		Share practices and explore ability to adapt existing mechanisms or create new ones, with a focus on doctoral candidates
II.4.	Access to EDUC trainings (e-learning, virtual mobilities, languages skills)		As part of EDUC Academy.
II.5.	Role in EDUC ('Ambassador' / 'Referral' role)		As part of EDUC teachers' communities of practice.
III.	**Project support**		
III.1.	Mutualized support (pedagogical engineering, technical services, …)		One EDUC pedagogical engineer per university, all working as a team.
III.2.	Mutualized facilities and tools (VC rooms, PCs, LMS, …)		LMS as part of EDUC tools. Other aspects are out of scope.
III.3.	Dedicated funding (external services, e.g. translation, payment of dedicated staff, payment of dedicated master-level internships, …)		Local implementations, notably to circumvent obstacles with monetary HR benefits. Explore alternative funding sources.
III.4.	Communication support, visibility actions (e.g. courses and programs visibility on EDUC portal, contribution to EDUC articles/publications)		Courses and programs visibility on EDUC portal: as part of EDUC tools.
IV.	**Mobility support**		
IV.1	Teachers' mobility funding (travel costs for EDUC missions, participation in international seminars for EDUC promotion/dissemination)		Share practices and explore ability to adapt existing mechanisms or create new ones
IV.2	Students' mobility funding		Share practices and explore ability to adapt existing mechanisms or create new ones
V.	**Structural incentives**		
V.1.	Dedicated timeslots for EDUC-powered courses in programs timetables		Explore the different ways to integrate VM courses in the programs; As part of EDUC Guidelines.
V.2.	University-level requirements in universities programs		Explore possibilities to set university-level requirements in universities programs where and when feasible.
V.3.	EDUC Certificate for students		As part of EDUC initiatives on administrative harmonization.

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5.6 Orientations for 2022 and beyond

In 2022, the goal will be primarily to iterate on the actions initiated in 2020 and 2021, in a continuous-improvement logic - by building on the learnings of the previous year – and in order to reach a next level in coordination and harmonization.

These are mainly orientations to be further assessed and detailed in the course of 2021.

Table 5: Orientations for incentives harmonization in 2022 and beyond (in light-green: continuation of previous year action, in grey: out of scope, in blue: dealt-with in another EDUC work package).

		Orientations for 2022 and beyond (to be reassessed by end 2021)	
		In scope / out of scope	Details
I.	**HR benefits**		
I.1.	Additional individual remuneration (extra hours)		Continue 2021 work, towards further harmonization.
I.2.	Reduction of or exemptions of teaching load from teaching obligations		Continue 2021 work, towards further harmonization.
I.3.	Valorization of online teaching load in teaching obligation		Continue 2021 work, towards further harmonization.
II.	**HR development**		
II.1.	Professional qualification / Employee Development Plan including EDUC Certificate for teachers		As part of EDUC initiatives on administrative harmonization.
II.2.	Ease access to teacher extra-grade (e.g. for assistant professors)		
II.3.	Recognition in equivalence of other duties (e.g. doctoral candidates courses requirements replace by contribution to an EDUC activity)		Continue 2021 work, towards further harmonization.
II.4.	Access to EDUC trainings (e-learning, virtual mobilities, languages skills)		As part of EDUC Academy.
II.5.	Role in EDUC ('Ambassador' / 'Referral' role)		As part of EDUC teachers' communities of practice. Consider additional ways.
III.	**Project support**		
III.1.	Mutualized support (pedagogical engineering, technical services, …)		One EDUC pedagogical engineer per university, all working as a team.
III.2.	Mutualized facilities and tools (VC rooms, PCs, LMS, …)		LMS as part of EDUC tools. Other aspects are out of scope.
III.3.	Dedicated funding (external services, e.g. translation, payment of dedicated staff, payment of dedicated master-level internships, …)		Local implementations, notably to circumvent obstacles with monetary HR benefits. Explore alternative funding sources.
III.4.	Communication support, visibility actions (e.g. courses and programs visibility on EDUC portal, contribution to EDUC articles/publications)		Courses and programs visibility on EDUC portal: as part of EDUC tools. Explore alternative means.
IV.	**Mobility support**		
IV.1	Teachers' mobility funding (travel costs for EDUC missions, participation in international seminars for EDUC promotion/dissemination)		Continue 2021 work, towards further harmonization.
IV.2	Students' mobility funding		Continue 2021 work, towards further harmonization.
V.	**Structural incentives**		
V.1.	Dedicated timeslots for EDUC-powered courses in programs timetables		Continue 2021 work.
V.2.	University-level requirements in universities programs		Continue 2021 work.
V.3.	EDUC Certificate for students		As part of EDUC initiatives on administrative harmonization.

6 Challenges and obstacles

Work undertaken in 2020 allowed for the identification of challenges and obstacles that may come from university practices and rules as well as from national and/or European rules and regulations. In some cases, a workaround was found. In some cases, solutions may only be found at university political level or through consideration in national or European regulation.

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We focus here on the obstacles and challenges relating to the 'HR Benefits' category of incentives and especially on the 'Additional individual remuneration' generic incentive, the implementation of which we worked-on in 2020.

Challenges and obstacles	Workarounds and/or solutions
Local / national: No way to implement monetary HR benefits due to local or national regulation (case of UP).	Replace by a 'Dedicated funding' kind of incentive for the corresponding EDUC activity.
Local / national: Differences in teachers' incomes and benefits levels in the different universities. Heterogeneous HR benefits in the same project team.	Even though this is an issue, this does not prevent from using local incentive schemes of this kind even for same EDUC activities. Appropriate communication to teachers is necessary, mentioning that 'the incentives are subject to local conditions'.
Local: Differences across universities in the existing HR benefits schemes: differences in the nature of eligible objectives, teachers' roles, etc.	Adapt local mechanisms to cover at least a subset of the EDUC objectives. Adapt local mechanism to cover at least a subset of the teachers' roles in EDUC activities. Eventually replace by a 'Dedicated funding' kind of incentive for the corresponding EDUC activity.
Local: Differences across universities in the timelines for local incentives instruments regarding attribution and period of reference.	Adapt the period of reference of the incentivized roles if and when possible.
Local / EDUC: Mismatch between the incentives budget that is necessary to match the EDUC objectives/indicators and the available budget.	Combine alternative/complementary funding sources at local, national or European levels. Tune the unit level of the HR benefits to available resources.
European (Erasmus+): Need to ensure that EDUC Erasmus+ funding can be used to fund/co-fund incentives.	This is ensured by the EDUC proposal which includes budget reservation for teachers contributing to EDUC activities.

European (Erasmus+): Need to ensure that costs of incentives for which we need an EDUC Erasmus+ support are eligible under the EDUC Grant Agreement. Comply with European principles of transparency and quality assurance. Comply with Erasmus+ cost eligibility principles.	Produce proper internal/project documentation to comply with principles of transparency and quality assurance. Implement a proper way to document costs of incentives (individual attestation for monetary benefits allocated to teachers).

7 Towards the post-EDUC-Pilot phase

The current pilot phase of EDUC has to prepare the post-pilot life of the EDUC Alliance. In this regard – and on top of the design principles identified in chapter 6 – it is important that the reflection on the Incentives in EDUC includes mid-term considerations regarding:
1. continuous improvement,
2. sustainability and economical model,
3. level of harmonization.

These considerations will have to be included in the reflections while further refining the teachers' incentives in the context of the EDUC alliance.

7.1 Continuous improvement

As a principle, the incentives should be regularly assessed, not only in the course of the EDUC Pilot but also beyond, according to:
- attractiveness to teachers,
- impact for the EDUC objectives and activities,
- benefits-to-cost ratio,
- synergies with connected strategies.

The approach may be based on a yearly post facto assessment and lead to regular adjustments of the incentives' schemes.

7.2 Sustainability and economical model

As we said in chapter 6, a desirable design principle is to *Enable frugal and scalable economical models*. Indeed, a couple of considerations need to be taken into account especially when considering the sustainability of the incentives in the long run:
- how do we do so that the activities started in the EDUC-Pilot survive after the EDUC-Pilot?
- should our incentives support only *transformation* activities or also *execution* activities? I.e., should we incentivize only the development of a new course in virtual mobility? Or also its execution in the next few years? And for how long?
- how should we incentivize activities when it generates asymmetric costs between the EDUC universities? I.e., how should an incentive be funded when 'one university will incur costs for the benefit of the others'? This is for instance the case for a synchronous virtual mobility course offered by teachers in one university to EDUC students in all EDUC universities. Should we then rely on a dedicated EDUC budget?
- how will an incentive scheme scale-up when we go from incentivizing 100 teachers to thousands of teachers? It is useful here to refer to the 'innovation diffusion curve': in the current EDUC pilot, we rely on the 'Innovators' and 'Early

adopters' among the teachers. In the long run, we will need to 'talk' and be attractive to the majority of the 'teachers. Then, the frugality of the incentives will be a must, but additionally the teachers' motivations and support needs may not be the same. During such upscaling phase, we may need to (1) leave the language of innovation to go towards a language of teaching enrichment and productivity; (2) adapt the incentive systems to support change (including - for example - the recognition of online teaching in education services).

7.3   Level of harmonization

In chapter 6 different possible harmonization levels along two axes were identified:
- depending on the incentives' scope (what is incentivized),
- depending on the incentives' mechanisms similarity.

And we said that, in the course of the EDUC pilot, we would target different levels depending on the obstacles and challenges but also of the a priori benefit-to-cost ratio estimate.

In the long run, there may be a progressive improvement over time, again in consideration of the obstacles and challenges but also of the benefit-to-cost ratio.

8 Acronyms

UNICA: University of Cagliari

EDUC: European Digital UniverCity

EDUC-Pilot: Pilot development project of EDUC in 2019-2022 (or 'EDUC pilot')

MUNI: Masaryk University

UPN: Université de Paris-Nanterre

PRP: Prime de Responsabilité pédagogique (monetary incentive scheme at UR)

PTE: University of Pécs

UP: University of Potsdam

UR: Université de Rennes 1

UY: academic-year (September to August)

VM: Virtual Mobility

VE: Virtual Exchange

WP: Work Package