



Societal Relevance of Research on Demographic Change

An internal JPI-MYBL survey on the relevance of research themes
by
the Societal Advisory Board (SOAB)
and the General Assembly of the
Joint Programming Initiative
“More Years – Better Lives” (JPI-MYBL)

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0. Summary

The aim of the JPI-MYBL survey on research themes of demographic change (DC) was to support the development of the Scientific Research Agenda (SRA) by a “virtual vote” of its members on the relevance of selected research themes. The perspective was from a political, organizational, and practical view point; the evaluation of scientific relevance will have to proceed from criteria of the scientific community. To keep them apart at this stage was the rationale for not including the members of the Working Groups (WGs) and the Scientific Advisory Board (SAB).

The survey could profit from work of the WGs and FUTURAGE (2011) especially by their providing a broad scope of research themes and analyses which laid out the field of relevant concepts and topics. Five themes were selected for each of nine categories (sustainable welfare; social systems; social and health care; work and productivity; education and learning; housing, living environment and mobility; technologies and social innovation; knowledge and information; ethics and welfare principles). These 45 questions constituted the core of the study; some additional questions and open questions were included. A total of 44 respondents - from the SOAB (N=11), General Assembly (N=14) and national experts or policy advisors (N=19) - filled out the questionnaire. The study was conducted as an internet questionnaire during February 2013.

A systemic 3-level model of the important realms of societies which are affected by DC – the SOAB model - was introduced to guide the selection of a comprehensive set of research themes and the interpretation of results. The central concept is “societal sustainability”; societal relevance is defined as the expected contribution of a practice (here: research activities) to the establishment or maintenance of societal sustainability. The SOAB model distinguished between economic, political, cultural, and social sustainability and corresponding dimensions of societal relevance.

For each research theme, the medium value (range from no priority 1 to high priority 5) was determined. Following a logic of “voting”, the “top five” and the “lowest five” were determined for assessments of the priorities of each group. Interestingly, the 3 participating groups had clearly differing opinions on the relevance or priority of themes:

- For all respondents, economic and technological themes showed the highest priorities, while ethical issues clearly received low priority.
- SOAB members displayed a notably different pattern. Themes which are “closer to home” like the living environment and housing policy have priority combined with a priority for integrated social and health care. Interestingly, economic and political considerations are issues with low priority.
- GA members chose a rather broad spectrum of economic, technology and health themes including themes with a reference to social inequalities. Still, ethical aspects rank low, so does - quite surprisingly – the measurement of policy outcomes.
- National experts show a somewhat higher priority for technological over economic themes, and they clearly see a priority for a better work-life-balance and integration of older persons into the workforce. One is tempted to conclude that they envision for themselves the benefits of a longer working life as experts. Ethical issues, again, have low priority as have options for unpaid work – apparently not a priority for experts.

These results should motivate to respect in the formulation of the SRA the different perspective on societal relevance by different stakeholders. Also the implementation of the SRA will have to reckon with different interests on different levels of the implementation process. Clearly, different stakeholders were perceived as holding influence on the EU, national and regional/local level.

Additionally, the medium priorities for each of the nine themes and for each dimension of societal relevance (economic, political, cultural, social) was calculated. Among the themes social and health care ranked highest; among the four relevance dimensions the economic dimension ranked highest.

An analysis of the underlying patterns structuring the responses revealed 9 factors which could be interpreted pretty well within the framework of the SOAB model. This gave additional support to arguments for the recognition of hierarchical levels, a life course perspective, welfare principles, and dimensions of societal sustainability and societal relevance (political, economic, cultural, social), as well as technological and social innovation, and environmental constraints as cross-cutting considerations in the elaboration of the SRA. Moreover, the current 4 overarching themes for the SRA – sustainable welfare, governance, economic and social productivity, and Well-being and QoL – could be interpreted as more abstract perspectives on the SOAB model and the results of the survey. The results of the study speak clearly for acknowledging the distinct importance of an additional overarching theme “social inclusion, social cohesion, and cultural diversity” do to justice to the relative independence of a meso-level of society. The importance of this realm in societies translates into a specific research field for DC, since the effects of DC are quite different on different levels of society.

1. Aim and scope of the survey

The Scientific Research Agenda (SRA) of JPI-MYBL on the effects of demographic change (DC) is based not only on the perspective of science and the needs for knowledge for evidence-based policies in the EU. The SRA acknowledges the perspective of stakeholders on all societal levels in politics, economy, culture and education, civil society, and of interest groups representing the European citizens affected by social change and the transition to an “ageing Europe”.

The Societal Advisory Board (SOAB) represents relevant stakeholder organizations on the level of the EU and is engaged in the development of the SRA. To make sure that at least all stakeholders in the JPI-MYBL can contribute to the discussion, a survey on the societal relevance of research themes was conducted in the J-AGE project that supports JPI-MYBL.

The aim of the study was a “self-survey” modeled on the idea of a “virtual voting”. The stakeholders in the JPI-MYBL are organized in two bodies, the General Assembly (GA) and the SOAB and these bodies defined the sample of the survey. The responses do not represent any broader audience of “the” stakeholders in the EU, but only the opinions of the participants.

Since not all stakeholders in JPI-MYBL participated in the study, even the representativeness of the results for JPI-MYBL may be questioned (see the response rates below). But the responses can and should be interpreted as “votes” given in a “virtual meeting” of JPI; not everybody participates in discussions and voting in meetings, yet in a context where membership is defined and everybody has a fair chance to enter his/her vote – like in the present study – we still interpret “votes” as representing a group opinion.

The “voting” and, accordingly, the survey questionnaire was designed to evaluate *scientific* research themes from the respondents own political, organizational and practical perspective. The evaluation of scientific themes by societal stakeholders will reflect their view on the relevance of corresponding research for societal problem solution.

The survey did not directly address the challenges and opportunities of demographic change as perceived by societal stakeholders. This issue is discussed in the SOAB and formulated in recommendations to the Scientific Advisory Board (SAB) which is responsible for drafting the SRA (see SOAB Report 2013).

2. Conceptual approach: Identifying research themes

The conceptual background of the survey could draw on the previous work of the JPI-MYBL. Besides the Vision Paper, two “authorized” sources for research themes were available: the reports of the five Working Groups (WG) of JPI-MYBL and the roadmap of FUTURAGE (2011), one of the declared starting points for the SRA. Additionally, discussions in the SAB and SOAB on the WG reports and the possible structure of themes in the SRA were integrated into a conceptual scheme for structuring the questionnaire and selecting questions.

The central concepts were “societal relevance” and “societal sustainability”. As discussed in more detail below, societal relevance was the criterion in the evaluation of potential research themes on the impact of demographic change (DC). The *relevance* was estimated subjectively by the survey participants by the expected contribution of research to the establishment or maintenance of societal sustainability. There exist various definitions of sustainability in the literature, but there is no agreed definition and no generally accepted way of measurement. Moreover, sustainability is further differentiated into concepts of e.g. environmental, economic, political, financial, cultural, and/or social sustainability. For our present purposes, we distinguished environmental and *societal sustainability* leaving environmental issues outside of the scope of the study. Societal sustainability is, then, understood to comprise economic (including financial), political, cultural, and social sustainability. Again, the study relied on an implicit understanding of the concept of societal sustainability.

The concepts will be elaborated below, but at this point it might be helpful to point out that *social* sustainability is defined here as a narrower concept distinct from economic, political, and cultural sustainability; frequently, it is defined residually to comprise all aspects which are *not* economic. The concepts of *societal* relevance and *societal* sustainability are proposed to include economic aspects and to support a more “holistic” or systemic view on the impact of DC. We are aware that societies, in turn, have to be seen in a context of globalization, but - unlike the concept of nation state - the concept of society can more readily be generalized to international relationships like the European society.

2.1 The societal “landscape” of DC effects

Demographic change affects all societal realms and consequently a broad, complex and multi-disciplinary scope of research themes characterizes the potential content of the study. The focus of JPI-MYBL is on the impact of DC, and, more specifically, on the effects of a changing population structure – the “ageing society” – on societal sustainability.

The basic “story” is described in Figure 1:

Societal progress produces the challenges and opportunities of DC as well as other challenges. DC has an impact on societal institutions; these include our welfare systems, which are at the center of attention, but also other institutions, for example, the institutions regulating family, work life, and political decision making. Social policies are to be re-designed to adapt to DC and implemented in social innovations. The distinction of policies and social innovations is relevant, because not all social innovations are simply implemented “top-down”; a lot of creativity in society works “bottom-up” from good practices. Finally, the effects on individual quality of life (QoL) constitute an outcome of policies which is decisive in policy evaluation and the evaluation of DC effects. The feedback leads eventually to social investments including or inducing change of the institutional framework.

Moreover, individuals react to social change and try to achieve QoL over their life course; they are agents participating in societal life. In as much as they are empowered - e.g. by democratic rules, health, education and secure incomes – they will influence and even initiate social innovations.

In this “story”, three levels of DC impact can already be distinguished:

- the level of societal institutions (e.g. welfare systems with certain responsibilities within and between the generations),
- the level of social policy and social innovations (e.g. the actual distribution of welfare benefits or the negotiation of the “care mix” by public, private, and voluntary providers), and
- the level of individual households (e.g. the work-life balance in the family or of individuals).

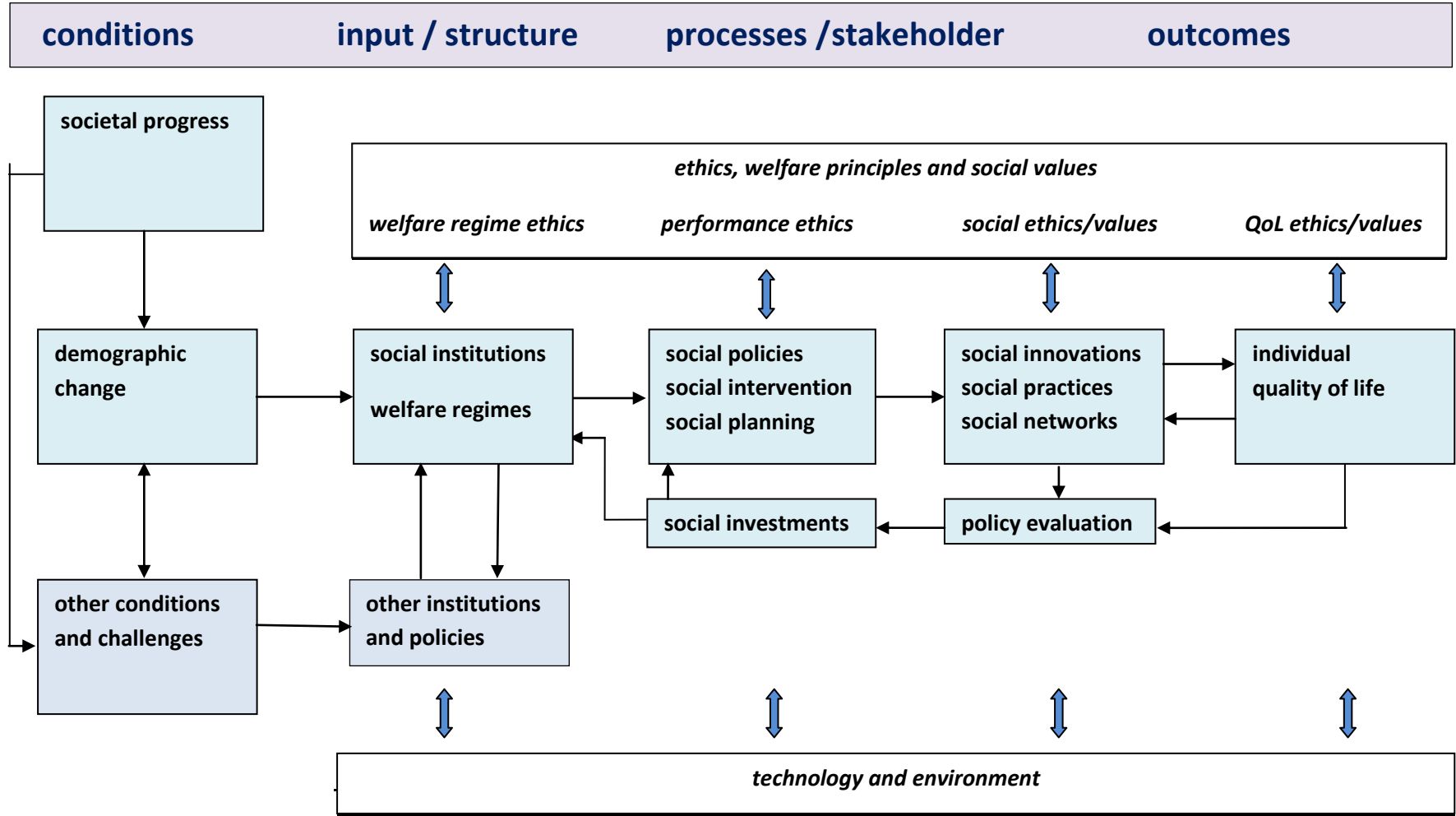
The effect of DC will, accordingly, consist of

- the structural effects on institutions (e.g. the increasing percentage of persons in retirement),
- the effects of shifting stakeholder influence in social policy (e.g. older persons dominating political decision making), and
- the effects of longer lives on the capacities of (not only) older persons to achieve QoL (e.g. longer life phase in old age with risks of health and social exclusion) and to contribute to society (e.g. by voluntary engagements).

Societal sustainability will depend on the success of policy makers in balancing social investments in (new) institutions with individual aspirations and contributions by means of social innovations. As indicated in Figure 1, this balance has to be achieved while respecting basic ethical values to which we are committed in the EU and within the restrictions set by technological innovations and environmental sustainability. High expectations are directed toward science and technology to assist in the search for solutions.

For the study on societal relevance of research themes, the task was to identify relevant research themes in this societal “landscape” and to evaluate their relevance from the perspective of societal sustainability.

Figure 1: Welfare policy under the impact of demographic change



2.2 Conceptual structure of the questionnaire

The structure and content of the questionnaire had to be comprehensive, but also practical. Unfortunately, at the time of the survey an explicit framework conceptualizing DC and its impact was not yet available; it will be the task of the SRA. Still, a conceptual framework had to be introduced to guide the study. As described in more detail below, three basic approaches were combined into a conceptual scheme referred to as the SOAB model (see Figure 2): the thematic structure of the five Working Groups (WG1-5), a three level societal “landscape” as introduced above, and a concept of societal relevance distinguishing four basic dimensions (see below).

Eventually, the questionnaire was structured by 12 sections or thematic categories:

0. Types of policies for societal sustainability
 1. Sustainability of the welfare society (sustainable welfare)
 2. Social participation and cohesion, civil society, and social services (social system)
 3. Health promotion and social and health care (health)
 4. Work and productivity (work)
 5. Education and learning (education)
 6. Housing, living environment and mobility (housing & mobility)
 7. Technologies and social innovations (technology)
 8. Knowledge, information and information exchange (science & information)
 9. Ethics, welfare principles and policy outcomes (ethics)
10. Governance: Influential stakeholders on 3 levels of policy making - EU, national, regional/local
11. Summary evaluation: Relevance of DC versus relevance of other issues

The sections 1 – 9 are the central thematic parts of the questionnaire; they will be referred to as “**categories**” in the following analyses.

The 5 WG reports furnished 5 substantial categories to be addressed: WG1 Health and Performance (3.), WG2 Social Welfare and Social Systems (1.+2.), WG3 Work & Productivity (4.), WG4 Education & Learning (5.), and WG5 Housing, Environment & Mobility (6.). The themes emerged as relevant research fields in the constitution of workshops of JPI-MYBL and can be interpreted as reflecting societal challenges as well as key factors of social policies. Health, employment and education stand for basic factors in Human Development strategies and interventions worldwide (UNDP 2008; OECD 2001; Sen 2001). Welfare sustainability is the major concern and challenge associated with demographic change, both on the level of national welfare regimes and the level of supportive social systems. Issues of housing, environment and mobility introduce the challenges of concretely organizing and integrating society and welfare in time and space, especially (but not only) on the regional and local level.

The themes of scientific knowledge as evidence-base for policies (category 8) and technologies as central factors in social innovations (category 7) emerged as cross-cutting themes in the WG reports. The importance of science seems to be obvious in a SRA, but still the role of science and the societal conditions for its influence can be questioned.

One important aspect is the availability of basic information for scientific analyses which can only be guaranteed by cooperation of political-administrative organizations and scientific institutions. The Fast Track Initiative on Data of JPI-MYBL addresses this issue and is reflected also in WG reports. Another aspect

is the way science is integrated into societal problem solving or social innovations on different levels. The role of “good practices” as kind of “bottom-up” learning strategies is a case in point.

The importance of technologies and social innovations was stressed repeatedly in different discussion forums (GA, SAB, SOAB), but the appropriate way of integrating these aspects was not yet decided at the time of the study, i.e. as cross-cutting dimension or as overarching theme. Including it in the study as a distinct theme was expected to provide further arguments for the specific treatment of this issue as distinct from other EU research programs such as Ambient Assistive Living or Smart Cities.

Ethical issues (category 9) appeared as a cross-cutting theme in the WG reports without a systematic treatment. It is obvious that concepts like welfare, quality of life, attitudes toward ageing, and social inequality rely on normative or ethical principles or social values. The SRA should contain a systematic place for ethical considerations, for instance, in reflections on the history and philosophy of social welfare or the issues of intergenerational equity implied in concepts of social sustainability. The questionnaire tried to give room for ethical aspects to provide further arguments for the discussion on their place in the SRA.

Following the “landscape” of DC impact above, a distinction between the level of welfare societies (1.) and the level of social systems (2.) was introduced. The distinction was suggested by the broad scope of the WG2 theme reaching from the issues of welfare systems (pensions, care insurance, employment policies) (macro-level) to issues of social communities, voluntary organizations (civil society) and private enterprises (meso-level), and down to households and individuals organizing their quality of life over the life course (micro-level). The questionnaire tried to deal with this complexity by looking at the relation between macro and meso in category 1, and between meso and micro in category 2.

The distinction of levels motivated additionally a separate set of questions (section 10.) which asked for the most influential actors on different levels of policy making – EU, national and regional/local. The argument being that the SRA has to be implemented on different levels and should reflect the interests of different stakeholders. They, in turn, are expected to recognize and to introduce into the policy process the differential impact that demographic change will have on different levels of society.

Obviously, it was impossible to do justice to the complexity of the categories within the frame of a questionnaire. A set of about 50 questions was seen as an absolutely upper limit; simple arithmetic reveals that about 5 items could be included in each category. Even given the character of a “self-survey”, which would warrant the expectation that respondents would show high motivation and endurance, it was signaled by the participant that a short version would be appreciated.

Additionally, the questions had to have a considerable degree of complexity. The questions had to be simple enough to be understood by a heterogeneous group of respondents from diverse professional backgrounds, but the questions also had to formulate issues which could be accepted as substantial issues for future research. After all, the aim of the survey was the evaluation of potential *scientific* research themes, although from the point of view of societal stakeholders and national research policy makers.

Given the limit of about five questions per category, it appeared to be best to treat the set of questions as impulses for the respondents to suggest further own questions or “missing questions”. Each category, therefore, offered the possibility to add own questions in a free format.

2.3 The concept of societal relevance

The aim of the study was an assessment of the *societal relevance* of research questions (vs. scientific relevance which is concerned with the growth of knowledge and standards of “truth”). It can be argued

that relevance in a societal perspective means that research on a given question will contribute to policies and innovations which serve to produce or maintain societal sustainability and sustain QoL for future generations.

Then:

Societal sustainability can be defined as the capacity of society to (re-) produce its essential features under changing conditions by established practices and social innovations.

Societal sustainability will include

- economic sustainability – the capacity of productivity, exchange with the environment, and distribution in order to provide resources, goods and services for societal and personal welfare in accordance with standards of social justice (dimension of **social security**)
- political sustainability - the capacity to make decisions and to implement them in order to provide effective **governance** including the effective and democratic participation of citizens (dimension of **social empowerment**)
- cultural identity sustainability – the capacity to develop and maintain a cultural identity, cultural values, social justice, social rights, and the rule of law in order to produce legitimacy and social inclusion for all and to reduce social inequality (dimension of **social inclusion**)
- social sustainability – the capacity to develop and maintain social justice and the social order through social cohesion and social integration, i.e. through trust, solidarity and cooperation in communities, networks and caring relations. (dimension of **social cohesion**)

The suggested definition of societal sustainability should help to clarify the meaning of terms like social inclusion, social cohesion, empowerment, and social security or social protection which are frequently used in discussions on EU policies.

Societal relevance can be defined as the extent to which a social practice or activity - including scientific research – contributes to (one of) the four **dimensions** of societal sustainability.

Note:

The definitions draw on quite general conceptions of “living systems” applied to societies (usually equated with nation states), but also to social systems below the level of society (e.g. organizations, households) or above (e.g. international relations in the EU). What does it mean to be living? An important feature of living systems - namely, to be organized in hierarchical levels (e.g. macro, meso, micro) - has already been mentioned. Moreover, for a society or a social (sub-) system to be “living” at least 4 basic functions - economic, political, cultural, social - have to be effective: they correspond to the 4 elements of societal sustainability above. The 4 dimensions apply also to social organisations, e.g. social and health care systems; they can also be applied to the individual level of QoL (e.g. living standard, capabilities, social identity, affective well-being)(Vaarama et al. 2008). These functions are related to a substantial body of social science theory (see for basic reference: Parsons 1978), but for the purposes of the survey they were used only heuristically.

The relevance is here especially related to the functional or causal significance of some feature or factor in the production of sustainability. Education, employment, and health care, for instance, are seen as relevant for societal sustainability due to their functional role. This role gives relevance to corresponding research. A problem with this view is that we, in fact, do not know how great the contribution to sustainability is, if only because we do not have a precise empirical concept of sustainability. In the literature, we find as a kind of substitute the concept of a “virtuous circle” linking several factors in a positive feedback loop. Thus, health may enable learning capacities, which enable work capacities, which enable democratic participation and socio-cultural activities leading to QoL which, in turn, contributes to health. Sustainable societies, in this view, are successfully institutionalizing “virtuous circles”. Since all 4 functions, as stated above, are seen as necessary for “living”, we can venture the hypothesis that effective “virtuous circles” incorporate at least one important factor from each dimension of societal sustainability. This approach can be traced back to Gunnar Myrdal who was one of the founding researchers of the social investment approach and the Nordic welfare model (Hagfors/Kajanoja 2009; Hemerijk 2011).

Societal Relevance can, however, not be reduced to a functional or empirical issue. The “virtue” of the “circle” rests on the positive evaluation of its outcomes. This requires the introduction of social values and ethics: economic welfare has to be valued over austerity; political freedom from repression and for the pursuit of own interests has to be valued over the stability of a life ruled by traditions; cultural identity has to be maintained as valued in a situation of cultural pluralism; social integration is always in conflict with very individual pursuits of happiness without regard for others. Ethical considerations can create relevance for (the prohibition

of) research over alternative research options, even when and especially when the causal role for sustainability is not well understood. The ethical dimension of societal relevance is essential for a vision of a future “aged” society, but it was not directly addressed in this study.

The 4 dimensions of societal relevance were specifically incorporated in the questionnaire in the first section (0.) on kinds of relevant policies (see Annex 1 and 4). The responses to the 4 policy options were to indicate the basic inclination of the respondents toward economic, empowering, human rights, or integrative policies. The expectation was that the correlation of question with these policy questions would help in the interpretation of the way the respondents interpreted the questions as relevant in one or more dimensions.

Since the question of relevance can be raised with regard to any activity, we can look for themes within each category which address predominantly (not exclusively) one of the 4 dimensions: economics, political-administration, cultural diversity/inequality, and social integration. For instance, asking about the relevance of education (category 5), we can inquire about the economic contribution of education, or the contribution to political empowerment, or about the reduction of social inequalities, or about emotional well-being. It should be noted that an important theme was identified in the discussion on the WG reports as largely missing, namely, the issue of inequalities and discrimination (of aged, gender, sub-cultures, minorities). This issue is now acknowledged as a dimension of societal relevance and was included as a cross-cutting aspect in the selection of questions in each category. Additionally, the 3-level structure implied for the selection of questions to address different levels in each category.

2.4 The SOAB model or the THL approach

The SOAB model brings all elements of the approach into one visual scheme (Figure 2):

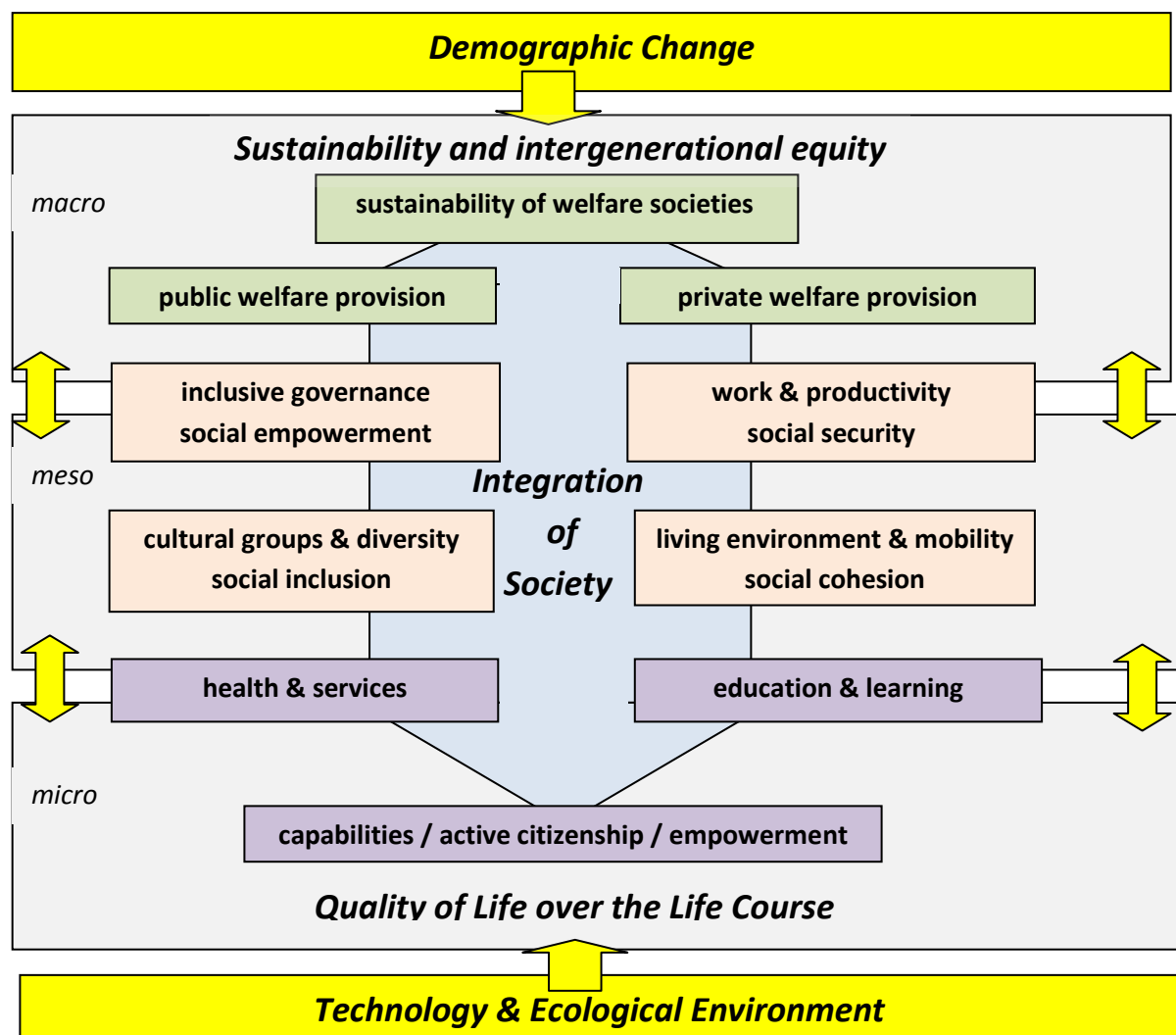
From the welfare policy perspective, we incorporate the 3-level structure with a focus on the (macro) institutional framework, the (meso) level of policy making involving stakeholders from all sectors of society, and the (micro) level of individual QoL as outcome and the person as active citizen.

From the perspective of the WG themes and their grounding in the Human Development approach, we keep the 5 central themes or categories, although they are somewhat differently interpreted: They are placed now into the “landscape” of society. Health & services (WG1) and education & learning (WG4) are considered now especially from the perspective of their role for QoL over the life course; they link the individual capabilities to the opportunities and conditions provided by the social system. Work & productivity (WG3) connects the individual on the meso-level to the level of public and private welfare provision; typically, this will occur through paid employment, but other productive contributions to society like unpaid voluntary or household work are included here. Over the life course, this also comprises savings and insurance (private) as well as accumulating rights to pensions and social and health care (public). Social security will depend largely on the biography of gainful employment; that is why social security is connected in the model to work & productivity. The substitution of income from own employment with social benefits will vary in different welfare regimes. Living environment & mobility (WG5) addresses especially the organization of social relations, social policies and social planning on the meso-level. Social systems and welfare (WG2), as indicated above, is divided into sustainable welfare provision and social systems which are located on the meso-level, and are often referred to as civil society.

From the perspective of societal sustainability and societal relevance, we become aware that two issues tend to be neglected: governance and socio-cultural diversity. Public welfare provision is, in fact, organized and guaranteed through effective and inclusive governance on all levels. This is also an aspect of the policy making process described above. Inclusiveness points to the fact that this process has to follow welfare principles of social justice and fairness by including all members of society. Cultural diversity, in turn, draws

attention to the pluralism of European societies and issues of integration and intergenerational equity. Some diversities and inequalities are based on local traditions, other forms are the effects of migration; in these cases, they are also included in the organization of the living environment. Other diversities, like those based on religion, ideologies, age, or gender are not necessarily localized and are better understood as related to societal institutions or social rights. Thus, between the sustainable welfare system and the active citizens we find the “active society” which realizes the 4 basic functions of economic, political, cultural and social sustainability through the activities of stakeholders and individuals.

Figure 2: The SOAB model or the “THL approach”



Having spelled out the “landscape”, we can again ask for the effects of DC (upper box in Figure 2):

- the effect on public provision of welfare: e.g. pension systems, social and health care
- the effect on private provision of welfare: e.g. substitution of public by private responsibilities
- the effect on political processes or governance: e.g. capacities of political innovation
- the effect on work and employment: e.g. employment security, productivity
- the effect on cultural diversities and inequalities: e.g. ageing minorities, cultural ageism
- the effect on social cohesion in living environments: e.g. segregation of old, mobility of young people
- the effect on social and health care services and their support of QoL: e.g. challenges of integrated care
- the effect of education opportunities and their support of QoL: e.g. challenges of life-long learning
- the effect of population change on the opportunities over the life course: e.g. new work-life-balance.

And we will have the expectation that science and technology (lower box in Figure 2) will help us to find solutions, which are not in conflict with environmental sustainability.

The model should assist in structuring the questions and it should guide us in the interpretation of the results of the study. Moreover, we will have to check, if the results of the study give some support to the model itself.

3. Methods

As indicated already, the questionnaire was designed as “virtual voting” of participants of JPI-MYBL. The questionnaire was administered as an internet questionnaire on the website of THL during February 2013. The methods and the analyses were restricted mostly to “hands-on” procedures which are transparent to the “voters”. The following description of methods should support this transparency.

3.1 Design of the questionnaire, selection of questions and distribution of responses

Underlying the selection of questions was a matrix combining the 9 substantial research categories with the 4 basic dimensions of societal relevance. Additionally, the 3 levels of society (macro, meso, micro) were considered. Obvious, in the selection of 5 questions for each category not all (4x3) aspects could be readily accommodated. Especially, the levels were not systematically addressed, and compromises had to be made in the interpretation of questions as representing a given dimension (say, social integration). The initial assignments of questions to dimensions are indicated in Annex 1.

The following matrix demonstrates the strategy of selection:

Aspects of societal sustainability and Societal Relevance	Level	Themes								
		1	2	3	4	5	6	7	8	9
economic welfare	macro/meso									
social security	meso/micro									
political-administrative	macro/meso									
social empowerment	meso/micro									
cultural diversity & inequalities	macro/meso									
social inclusion	meso/micro									
social integration	macro/meso									
social cohesion	meso/micro									

The matrix asks for 72 possible questions; a sample of 45 (9x5) was eventually selected. The questions were selected from a list containing all questions (about 340) explicitly formulated in the 5 WG reports and in the FUTURAGE report (2011). A few questions (e.g. on “good practices”, questions on ethics) were newly introduced to cover neglected aspects (from the point of view of the matrix above). Most questions were reformulated to fit the format of the questionnaire (How...?; What...?) and to reduce their length (see questionnaire in the annex).

As will be demonstrated by the results below, the first “face value” assignment of questions to certain dimensions was not always confirmed by the ways the respondents interpreted the question. The initial objective – to include a wide spectrum of questions to capture the complexity of the issues – still seems to have been reached with this strategy.

The answers were standardized by a scale with 5 degrees of priority reaching from “no priority” to “very high priority”. The option “no priority” was selected only in about 3% of the possible responses. This might be expected, since the questions were intended to describe relevant research themes. In almost half of the questions the answers were skewed to the end of “very high priority”, i.e. this option was the mode of the distribution. The range of the responses did spread over the entire scale with only 3 exceptions: most participants (34 of 44) confirmed at the end (11.) that the issue of demographic change has “very high priority” while the others (10 of 44) attributed only “high priority”; in two other questions (0.2 on “Policies that develop the capabilities...” and 2.3 on “Improving the effectiveness and efficiency of services...” only the three higher options were chosen). In only 4% of the possible responses, no valid answer was given.

The questionnaire was subjected to 3 rounds of evaluation: (1) by three members of the THL team, (2) by the WP leaders of the J-Age project (including an English native speaker) and a representative of Age Platform Europe as external expert, and (3) again by the THL-team to incorporate feedback. The main issue certainly was the complexity of the questions which had to be adjusted in each step. To allow for waving the answer of too difficult questions, the option of “I have not sufficient expertise to answer” was introduced.

Apparently, this process was quite successful, since there was only little feedback after the survey by respondents complaining about complexity, and there was only limited use of the “exit” option (about 4% of the responses over all respondents and questions).

3.2 Description of the sample

The survey was focused mainly on the members of the SOAB, since their evaluation of research themes with societal relevance was to be supported by the results. Each organization represented in the SOAB was to provide one questionnaire. It could choose who would answer for the organization; in some cases two questionnaires were submitted. An overview over the members of SOAB is provided in table 1. It demonstrates the wide scope of interests represented in the SOAB. Most members supplied a questionnaire; the return rate was 82% (9 of 11) and a total of 11 questionnaires (2 additional) were included in the study.

However, the scope of the study was extended to other stakeholders within JPI-MYBL, namely, the GA members as representatives of research policy makers and, additionally, to a selection of national experts. The argument was that each country representative might like to broaden the political stakeholder perspective by including experts who typically are located either in the administration (“policy doers”) or function as policy advisors.

Each country was asked to supply one questionnaire filled out by a GA member, and up to 3 questionnaires from national experts could be nominated by the GA member. The response rate for the GA was 66% (10 of 15) with a total of 14 questionnaires due to extra responses by 5 countries. The somewhat low response rate is partly explained by the fact that some GA members delegated the response to a national expert. Only one country did not submit a questionnaire. The response rate of experts – counting that at least one expert was invited to join the survey – was 80% with a total number of 19 questionnaires included. A number of countries had more than one and up to three experts were responding.

The total sample amounted to 44 questionnaires. As already noted, the questionnaires were largely complete, only in about 4% of the possible responses the option “I do not have the expertise to answer” was selected. Following the principles of a secret “vote”, the actual respondents are not identified in this report. Only the membership in SOAB, GA and national expert group is used to distinguish the different interests of societal stakeholders, research policy makers and administrative advisors.

Table 1: List of respondent from SOAB, GA and national experts N=44

List of SOAB member organizations	List of countries of GA and national experts
Age Platform Europe, Council of European Municipalities and Regions Eurocarers Eurochambres European Association for the Education of Adults European Hospital and Health Care Federation European Social Network European Trade Union Confederation Hospitaller Order of St. John of God Insurance Europe International Society for Gerontechnology Dr. Alexandre Sidorenko, Independent Policy Adviser (not yet a member at time of study)	Austria Belgium Denmark Finland France Germany Italy The Netherlands Norway Poland Spain Sweden Switzerland Turkey United Kingdom
responses 9 of 11 = 82% total responses with extra responses N=11	responses of GA 10 of 15 =66% total responses with extra responses N=14 responses of national experts 12 of 15 =80% total responses with extra responses N=19

It should be emphasized again that the sample was not designed to be representative beyond the participating groups themselves. Consequently, the following analyses and interpretations have to be read with the appropriate caution. This applies especially to results based on statistical analyses, which can only have an explorative character indicating trends in the responses. The results, as argued above, may be seen as “votes” in a “virtual meeting” of JPI members; the results will be used in subsequent discussions as additional input.

4. Results: The research priorities of stakeholders in JPI-MYBL

The aim of the survey was to identify those research themes which are regarded by the SOAB and – in comparison – by GA members and national experts as themes with high or very high priority. Accordingly, the analyses focus on the questions which received the highest “votes” from members of the different groups. We will also look at the questions receiving the lowest “votes” to gain a better understanding of priorities.

Additionally, the responses to the question on the most important theme (11: “If you had to suggest only one issue...”), about other challenges with even higher relevance than demographic change (11.) and themes regarded as missing in the questionnaire (open question at the end of each category) are presented.

Finally, an explorative analysis will be made of the structure of underlying factors which can account for the pattern of responses. To some extent we will expect that themes within a given category (e.g. health) will be “voted” as similarly important. So the categories might represent a pattern of responses. Also the 4 dimensions of societal relevance, which were deliberately inserted into the questionnaire, might be expected to produce a clustering of similar responses to questions with the same dimension (e.g. economic dimension). An analysis of the response patterns might, thus, reveal underlying factors of relevance, which, in turn, could provide suggestions for a conceptual framework. Moreover, the relevance of categories or of the 4 dimensions of societal relevance can be assessed by considering the relevance of the set of corresponding themes.

4.1 Priorities of categories and research themes – all respondents

Themes for research received quite different “votes” on their priority by different respondents (N=44). The total number of “votes” given to each theme on a scale from “no priority” to “very high priority” is presented in the summary of the responses in annex 3. To describe the central tendency of all responses, the medium for each category and for each theme was calculated (see table 1). Including the 4 policies for societal relevance (question 0.1-4), the medium over all themes was 3. 83 (on the scale from 1 to 5).

Looking first at the priorities for the categories of the questionnaire (see list 1. to 9. above), we observe:

- health, social system, housing&mobility, and technology range above average;
- education, system sustainability, work, and science range in the middle;
- the ethical category is clearly less prioritized.
- somewhat surprisingly, the themes addressing the sustainability of the welfare system taken together do not rank above average, although – as we see below – the specific question (1.1) on the sustainability or the welfare system has the “top priority” in the sample and among GA members.
- the 4 kinds of policies are clearly considered to be important, although we note that policies for “empowerment” (0.2) have the edge over policies supporting solidarity in social systems (0.4).

Looking at the “top five” and the “lowest five” in the total sample, we get the following results:

Five themes with highest priority	All Respondents / mean relevance
1.1 How can we ensure that social welfare systems will continue to provide social and health care, social security benefits and pensions as well as adequate incomes and employment in the future?	4,61
7.1 How can technologies be used to innovate and to optimize the provision of welfare including the organization and delivery of social and health care services?	4,52
3.3 How can the special needs of older persons with chronic frailty and physical or mental disabilities be best addressed in social and health care?	4,26
4.3 How can public and private employers be motivated by regulations and/or incentives to employ and to adequately integrate and to promote both the youngest and the oldest age groups in the future?	4,17
7.2 How can education and technology enable the competent use of technologies by older people and support older people in participating in public, social and cultural life?	4,16
Five themes with lowest priority	
9.5 How can disagreements and conflicts about social values and ethical principles between groups in society be resolved and which institutions and regulations lead to solutions which are accepted?	3,33
9.1 Concerning the challenges and opportunities of demographic change: What are the attitudes and values of different groups and generations and how are they discussed in public policies and in the media in the EU?	3,32
3.5 What are the challenges and opportunities of increasing migration of care workers and “tourism” of health care consumers for coordinated social and health care system in Europe?	3,29
7.4 How do new technologies (e.g. internet, social networks) affect the development of common values, principles and policies of welfare systems in Europe?	3,02
9.4 What is the role of spirituality, religion and religious institutions for personal quality of life and for the adaptation of the welfare state to demographic change?	2,71

Economical (1.1; 4.3) and technological (7.1; 7.2) themes show the highest priorities, joined by a health theme with a focus especially on those persons with the greatest needs (3.3) and - we might like to add – responsible for the highest costs; the latter interpretation is supported by high correlations of this theme with other economic questions. Research on solutions to economic problems - emphasizing technology and focusing on the gravest health issues - appears to have the highest priority.

The lowest priorities are clearly reserved for issues concerning ethics and welfare principles (9.1; 9.4; 9.5) with the value-effects of technologies included (7.4). Somewhat surprisingly the issue of “welfare tourism” is given low priority. Checking on the correlations of this theme with other themes it appears that it is not so much perceived as a political or economic issue, but rather seen in connection with themes of health, life style, and (again) ethics.

4.2 Priorities of SOAB members

The priorities of the SOAB members (N=11) show a notably different pattern. With only a total of 11 respondents, we should remind us that the results should be interpreted with caution. The SOAB members were selected to represent a wide scope of interests on the level of the EU and they are experts in their own field, but they will not strictly represent the priorities of all stakeholders in the EU. Still, as a group in JPI-MYBL they seem to set different priorities, as shown in the following table:

Five themes with highest priority	SOAB Members / mean relevance
6.1 How can changes in the living environment (e.g. housing, infrastructures, ecological quality) and the social environment (e.g. social networks, neighborhood, community) affect the quality of life of all age groups?	4,78
6.4 How can policies coordinate public provision of housing and private housing markets to ensure that the quantity and quality of dwellings and infrastructure are adapted to the needs of demographic change?	4,71
7.1 How can technologies be used to innovate and to optimize the provision of welfare including the organization and delivery of social and health care services?	4,70
3.3 How can the special needs of older persons with chronic frailty and physical or mental disabilities be best addressed in social and health care?	4,60
3.1 How can the interdependence of biomedical, psychological and social factors of health over the life course be better addressed by integrated strategies of assessment, treatment and care?	4,55
Five themes with lowest priority (4 with same priority)	
3.5 What are the challenges and opportunities of increasing migration of care workers and “tourism” of health care consumers for coordinated social and health care system in Europe?	3,40
7.4 How do new technologies (e.g. internet, social networks) affect the development of common values, principles and policies of welfare systems in Europe?	3,40
8.3 How can we improve understanding and modeling of past and future developments over longer periods of time to evaluate the challenges and opportunities of demographic change in Europe?	3,40
9.1 Concerning the challenges and opportunities of demographic change: What are the attitudes and values of different groups and generations and how are they discussed in public policies and in the media in the EU?	3,40
4.4 Considering their different views on welfare policies: How do public, private and voluntary stakeholders in the economy influence policies for the adaptation of the labor market to demographic change?	3,27
1.5 To meet the challenges of globalization: How could responsibilities and capacities of welfare policies be better organized and distributed between political and administrative levels (European, national regional, local)?	3,18

Interpreting the different priorities of SOAB, it seems that themes which are “closer to home” like the living environment and housing (6.1; 6.4) have a priority. This includes the – technologically enhanced (7.1) – organization of care, not only for the most needy, but also as integrated care for everybody (3.3; 3.1). Economic or political considerations are not up front.

Interestingly, political themes do range among the themes with lowest priority: globalization (1.5), European development (8.3), the influence of stakeholders (4.4) and welfare tourism (3.5). Even research on themselves as stakeholders (!) does not have priority. On the other hand, compared with the total sample and the other groups, ethical issues and welfare principles are not so prominent among the themes with the lowest priority. Only the theme on general values (9.1) and the evaluation of the effect of technology on values (7.4) do appear in the lowest five. Even the theme of religion (9.4) escaped the lowest ranking.

4.3 Priorities of GA members

GA members, again, show a different pattern. The group is small (N=14), but they represent the central interests of the participating countries of JPI-MYBL. The following table displays their priorities.

The priorities of the GA members appear to show a broad view on welfare conditions from the level of the society (1.1) to economic aspects (4.3) as well as to social conditions of health (3.1; 3.2) and technology (7.1). It should be noted that at least 2 themes (3.2; 2.1) explicitly refer to social inequalities emphasizing

the issue of inclusion, while themes related to the living environment or education do not feature among the top five.

Among the lowest priorities are value issues (9.4; 7.4; 3.5 – “tourism” seen as ethical issue by respondents) and two themes concerning knowledge (8.5; 9.2). It is somewhat surprising that the measurement of policy outcomes (9.2) is ranking so low; we need evidence-based information not only for policies, but also for their outcomes.

Five themes with highest priorities		GA Members	/ mean relevance
1.1	How can we ensure that social welfare systems will continue to provide social and health care, social security benefits and pensions as well as adequate incomes and employment in the future?		4,78
3.2	What are the conditions and risks for a long, healthy and active life due to socio-economic and gender inequalities, cultural differences, and life styles?		4,64
3.1	How can the interdependence of biomedical, psychological and social factors of health over the life course be better addressed by integrated strategies of assessment, treatment and care?		4,54
2.1	What are the effects of demographic change on our life styles including differences in gender, and cultural and ethnic diversity, and socio-economic inequality?		4,35
4.3	How can public and private employers be motivated by regulations and/or incentives to employ and to adequately integrate and to promote both the youngest and the oldest age groups in the future?		4,28
7.1	How can technologies be used to innovate and to optimize the provision of welfare including the organization and delivery of social and health care services?		4,28
Five themes with lowest priorities			
3.5	What are the challenges and opportunities of increasing migration of care workers and “tourism” of health care consumers for coordinated social and health care system in Europe?		3,38
9.2	How are the goals of social welfare, social sustainability and quality of life effectively determined, measured and implemented in social policies in different EU member states?		3,35
8.5	How can the assessment of benefits and costs of information systems and information exchange be improved to guide investments on all levels of the “information society”?		3,18
7.4	How do new technologies (e.g. internet, social networks) affect the development of common values, principles and policies of welfare systems in Europe?		2,92
9.4	What is the role of spirituality, religion and religious institutions for personal quality of life and for the adaptation of the welfare state to demographic change?		2,64

4.4 Priorities of national experts

The priorities of the national experts nominated by GA members correspond closest to the priorities of the total sample. This is not so surprising, since the national expert comprise the largest group (N=19). Still, as the following table shows, there are some interesting differences:

The priorities of the experts may be slightly more technological (7.1; 7.2) rather than economic (1.1) in comparison with the total sample. A remarkable difference, however, is the priority for a better work-life-balance (2.2) which goes along with the concern for employer incentives to integrate older persons in the total sample (4.3). One is tempted to conclude that experts have a great interest in a better work-life – balance and would like their employers to offer them options for a longer working life.

The lowest priorities show the same pattern for ethical issues as in the total sample. Additionally, it seems that experts don’t consider options for un-paid work to be important. Again, one is tempted to conclude that experts see here little problems for themselves. Noteworthy might be the fact that the theme of disagreement and conflict resolution (9.5) does not appear in the low ranking ethical issues of SOAB and

GA; thus, the low rank in the total sample is likely to be due to the experts. It is somewhat disturbing, if one would have to conclude that experts in policy advisory positions may feel to have influence enough and do not place high priority on the improvement of regulations and institutions designed to resolve conflicts in society.

Five themes of highest priority		National Experts / mean relevance
7.1 How can technologies be used to innovate and to optimize the provision of welfare including the organization and delivery of social and health care services?		4,61
1.1 How can we ensure that social welfare systems will continue to provide social and health care, social security benefits and pensions as well as adequate incomes and employment in the future?		4,58
2.2 How can we combine periods of work and retirement, training and education, family and care, leisure and voluntary activities, and engagement in public and political life in new and flexible ways over the life course?		4,21
7.2 How can education and technology enable the competent use of technologies by older people and support older people in participating in public, social and cultural life?		4,16
4.3 How can public and private employers be motivated by regulations and/or incentives to employ and to adequately integrate and to promote both the youngest and the oldest age groups in the future?		4,11
Five themes of lowest priority		
4.5 How can we use the productivity of un-paid work by males and females more effectively over the life course while respecting individual needs and principles of gender equality and social justice?		3,16
6.2 How do differences in mobility and access to transportation affect the economic, political, social and cultural opportunities of different age groups?		3,16
7.4 How do new technologies (e.g. internet, social networks) affect the development of common values, principles and policies of welfare systems in Europe?		2,89
9.5 How can disagreements and conflicts about social values and ethical principles between groups in society be resolved and which institutions and regulations lead to solutions which are accepted?		2,87
9.4 What is the role of spirituality, religion and religious institutions for personal quality of life and for the adaptation of the welfare state to demographic change?		2,33

4.5 Summary of group priorities

Summarizing this section on the research priorities of the three groups, we should point out that some of the results may appear to be “telling”, but still we should be cautious with the interpretation. We see them as a reminder that different positions in the policy making process will have an influence on what is perceived as relevant for an EU research agenda.

The differences between themes are rather small, and we should focus more on the interpretation of all (high and low) themes rather than on particular rankings. The total sample more or less confirms our expectations that economics and technology count and that health is important while ethics and social values rank clearly lower. It should be kept in mind, however, that a lower rank in the “votes” does not indicate “no priority”, since this valuation could be made explicitly and is quite rare.

Focusing on particular groups, we observe that the general position as policy maker, expert advisor or stakeholder does have an influence on the themes with “top priority”. We also see some tendencies to rank themes high which correspond to own interests and to rank themes low which either are too distant from own life situations (e.g. un-paid work for experts) or too close (e.g. research on stakeholders for SOAB). In general, SOAB members attribute higher priority scores; GA members follow next while experts tend to give scores lower than the total sample. This might indicate that experts have a more “detached” attitude to the challenge of DC.

4.6 “Most important” and “missing” themes as noted by the respondents

At the end of the questionnaire the respondents were given the opportunity to identify the most important theme “if they had to suggest only one issue”. A total of 31 respondents took the opportunity and actually named a broad range of themes covering every category of the questionnaire. The sustainability of the welfare society (9 nominations) and social and health care (7 nominations) collected the most “votes” confirming again the relevance of those themes; technology (2 nominations) could not attract more “votes” than other themes like, for instance, the ethical issue of equity (2 nominations).

The questionnaire asked also – in an open question – to state whether other issues have a higher priority than the impact of demographic change. A total of 23 themes (6 respondents giving 2 answers) were identified; perhaps not surprisingly, the economic crisis (8) and ecological issues (5), and - somewhat less obvious - rising social inequalities (5) emerged as more important challenges.

One respondent emphasized in an extensive statement that there is a great need for a vision “to give hope and perspective to the EU population” and for a “core message reaffirming positive and stirring objectives to the EU, leading to the construction of a highly self-confident zone relying on adequate economic governance, integration of new technologies, high human values, that should lead to the well-being of each citizen, should he/she be a EU citizen or not.”

Perhaps we should read this statement as a reminder that questionnaires are not necessarily instruments which allow for an easy and direct access to what is really important – and that also the SRA needs an inspiring vision!

Finally, the open answers to the question on “missing policies” (0.1-4) and “missing themes” offered in each of the 9 categories (1. – 9.) have to be evaluated. They should give additional information on themes not adequately addressed in the questionnaire. Unfortunately, the responses are difficult to evaluate, because in many cases the “missing” themes actually were included at a later part of the questionnaire, maybe with a somewhat different formulation or emphasis.

Perhaps three themes on missing kinds of policies - addressed in the 20 entries to the open question - are, not covered sufficiently:

- (a) the relationship of demographic change and its economic challenges with environmental sustainability; there is only one theme in housing&mobility (6.5) touching on the problem,
- (b) innovation policy for both social and technological innovations; the category on technology (7.) has a focus on the uses and impacts of technology in relation to DC, but it does not directly address the importance of innovation policies as a condition for innovation;
- (c) a reference to fertility rates and family needs points to themes related to population policies and shrinking populations; the JPI-MYBL made a decision to focus on the impact of ageing population structures, but there may be a need to address – besides mortality/health and migration – also fertility and population size in their effects on population structure and its impact.

All three themes are somewhat at the periphery of SRA, but it may be worthwhile to at least mention these aspects in the vision and mission of JPI-MYBL.

Additionally, the themes claimed to be missing in each category give some information on relevant themes perceived to be underrepresented. A total of 62 responses were made; about 5 to 8 respondents made comments for each category, but only 2 commenting on the ethics category; 9 respondents submitted 2 themes. Again, the themes are difficult to evaluate, since many may be interpreted as not really missing. Still, 9 themes can be identified which are felt to be underrepresented:

- (a) global social policy as context for EU policies
- (b) inequalities, age discrimination, minorities and migrants
- (c) role of technology and the role of older persons in design and use
- (d) social and technological innovation
- (e) e-learning, e-education and ICT in the information society
- (f) civil society, coproduction of providers and users of services, and public employment
- (g) health research in advanced fields (e.g. computer neurology)
- (h) fertility rates and family policies

Some of the themes are repeating comments made already above with regard to important and/or missing policies. It is interesting that global social policy is mentioned which indeed may be a missing theme; the items c, d and e can be interpreted as pointing to a general underrepresentation of the developing “information society” changing the life situation (not only) of older persons at work and in everyday life; the emphasis on voluntary work and work in public services points to a possible neglect of the impact of public (supported) employment on the labor market.

Especially the SOAB will have to consider, if these – and other themes raised by the survey – should be included in the recommendations to the SAB for SRA.

4.7 The influence of stakeholders on EU, national and regional/local level

At the end of the questionnaire, the respondents were asked to estimate the influence of different kinds of actors on social policy (see annex Q10.1-3). Realizing the opportunities as well as coping with the challenges of DC will have to rely on the disposition of stakeholders to engage in and support social policies in a broad sense and on all levels. Five stakeholders from politics, administrations, juridical system, private business and unions, professional organizations, research and education as well as from civil society could be selected from a list of the most influential stakeholders on the EU level, the national level and the regional/local level. The results may not be totally surprising to anyone following the newspapers, but still they are worth noting and to be kept in mind when referring to “the” policy makers who are to implement scientific recommendations into practice.

First, on all levels the elected representatives and the political administration are perceived as most influential, although – quite typically and realistically the regional/local elected bodies are seen to have clearly less influence. This is to be expected, since a wealth of laws and regulations tends to restrict the choices on a more local level.

Second, however, on each level stakeholder assert a relative high level of influence which they do not have on other levels:

- On the EU level, we observe an alliance of parliament and administration with big business and science and professional organizations. Also the juridical system and political movements are seen as influential. Together they paint the picture of a modern ruling elite – not surprisingly.
- On the national level, things are much more “traditional”. Here political parties, employer organizations and trade unions have their, relatively, largest influence. Any policy addressing the labor market, clearly, has to go through the – very different – corridors of the national policy arena.
- On the level of regions and municipalities, again a different set of stakeholders wields relative influence, if only within the bounds set by higher levels. Small and medium business, educational institutions, and a diversity of voluntary organisations, religious institutions and (sub-) cultural groups have influence supported by a relatively high influence of the public media like TV and the press. It is not really news, that even EU level initiatives and programs can meet serious opposition when the regional and local public can be mobilized.

These results are not only important in the context of implementing social policies – possibly well based on scientific evidence. Each local, regional and national context has its own history of previous attempts to solve problems and to aspire for a better future. This implies that the process of DC meets quite different conditions and takes quite different routes in different parts of Europe. Not only the well acknowledged differences of welfare regimes in Europe have to be considered, there are also large differences within national boundaries. And perhaps even more important, within a “Europe of Regions” and a globalized networking of stakeholders in “information societies”, the national political arena will not necessarily be chosen or accepted by regional initiatives as the adequate level of coping with the challenges of the future.

4.8 The structure of research themes: Factors underlying the responses

The meaning of themes or questions is better understood in context with other related questions. A factor analysis can reveal the underlying relationships between questions, i.e. to what extent questions share some more common meaning. The preconditions for a factor analysis (in this case especially a normal distribution of the priority “votes” for each question) are not strictly fulfilled. Still, an explorative factor analysis - interpreted with caution - can shed some light on the underlying factors or concepts. As noted above, we would expect that the categories and possibly the 4 dimensions of societal relevance emerge as underlying conceptual factors. But this need not be the case, since respondents will connect their own meaning to the themes.

In table of annex 2, the results of the factor analysis are shown. (Some more technical information on the procedure and results are given there.) The questions are listed (Q0.1 to Q9.5) for each category 1-9 of the questionnaire. On top of the table 9 factors are identified with acronyms; the factors are described in table 3 below. The numbers in the table indicate to what extent the question are positively or negatively related to each factor or “loading” on a given factor. The five highest loadings are accentuated in the table, since they indicate that the meaning of that factor is closely related to the meaning of the corresponding questions. As the distribution of loadings reveals, the questions are specifically related to certain factors and not to others. Some factors are closely related to categories of the questionnaire as indicated by the fact that all questions in that category show high loadings on that factor (e.g. factor 3 and health; factor 4 and ethics; factor 6 and technology). Again, a note of caution: the mapping of questions on a set of factors and their interpretation is to some extent an “art” rather than a rigorous method – alternative solutions are possible, but they will be more or less convincing.

The factor analysis produced 9 factors which we labeled

1. inclusive governance (GOV)
2. educated agency (QoL)
3. inclusive care (CARE)
4. ethics (ETHICS)
5. economics and welfare (ECON)
6. technology (TECH)
7. stakeholder influence (STAKE)
8. housing and environment policies (ENVIR)
9. social policy and civil society (SOC)

In table 3, there is a short description of each factor relying on the questions with high loadings. The five highest loadings are highlighted in the table and identify the five questions (see table 3) characterizing the

meaning of the factor (for the questions see table 1). Also indicated is the mean relevance of these top five themes – similar to the top five rating, we made for the members of different groups.

Table 3: The factor structure of the survey

factor name	description	high loading questions	mean relevance
1. inclusive governance GOV	the factor combines evidence-based welfare policies with other political themes and social inclusion, note: economic aspect (Qo.1; Q1.1) are not included	Q8.1, Q8.3 Q1.5, Q4.1, Q5.1	3,90
2. educated agency and QoL QoL	the factor combines QoL and autonomy by education with life style, social relations and mobility	Q5.2, Q5.4, Q5.5 Q2.1, Q6.3, Q1.3	3,70
3. inclusive care CARE	the factor is centered on social and health care, but it reaches out to political, institutional, civil and work-related aspects	Q3.1, Q3.3 Q3.4, Q2.5 Q4.5	3,86
4. ethics and values ETHIC	the factor has a clear and independent focus on ethical issues and social values	Q9.1, Q9.3 Q9.4, Q9.5 Q7.4	3,29
5. economics, welfare & work ECON	the factor has a clear focus on welfare economics and work life including information costs, employer incentives, and efficient care	Q1.1 Q2.2, Q3.3, Q4.3 Q9.3	4,25
6. technology TECH	the factor represents the category of technology themes with relations to individual capabilities	Q7.1-5	3,86
7. stakeholder influence STAKE	the factor is positively relating to public (communities), private (employers) and voluntary (services) stakeholders and negatively to technological aspects and the living environment	Q4.3, Q4.4 Q5.3, Q6.3 Q8.2	3,78
8. housing and environment policies ENVIR	the factor combines housing and living environment policies and service organization; note: except mobility related to factors 1 and 2	Q6.1, Q6.3 Q6.4, Q6.5 Q2.3	3,95
9. social policy and civil society SOC	the factor has a focus on aspects of social cohesion, social policies and civil society; social inclusion is (like in governance) not seen as ethical issue (Q0.3), but as “good practice”	Q2.2, Q2.4, Q2.5 Q8.4, Q9.1	3,79
		average mean of relevance of all questions	3,83

First, we ask whether the categories and WG themes correspond to a specific factor:

Category 1+2: Social welfare and social systems (WG2)

The themes in category 1 and 2 are captured - together with a strong labor market component from category 4 Work – in factor 1 GOV. Note that aspects of social systems do migrate to an own factor 9 SOC; the content of the category “Social Welfare and Social Systems” turns out to be heterogeneous, as we mentioned before. On the other hand, scientific information (category 8) contributes strongly; governance is, obviously seen as evidence-based, and it also includes themes related to social inequalities – therefore, the label “inclusive governance”.

Category 3: Health and Performance (WG 1)

The themes of category 3 are dominating in factor 3 CARE. But CARE receives enriching elements from other categories, especially some aspects of social inclusion, most obviously by the loading on that kind of policy (Q0.3). So the theme of health care as described by CARE appears to reach out into the social context of the civil society.

Category 4: Work and Productivity (WG3)

These themes are mostly “absorbed” by factor 1 GOV on social welfare. Apparently, they are seen as part of public welfare policies. Questions addressing other economic aspects form an own factor 5 ECON.

Category 5: Education and Learning (WG4)

The themes of category 5 are closely relate to factor 2 QoL; but the factor labeled QoL also collects high loadings which might best be characterized as enriching education in the direction of self-determination and agency of life styles (Q2.1) in social relations (Q0.4) including even mobility (Q6.2; Q1.3; Q3.5).

Category 6: Housing, Environment and Mobility (WG5)

The themes of category 6 cluster clearly in factor 8 ENVIR with the notable exception of mobility (Q6.2). The efficient organization of care services is strongly related to factor 8. The factor EMVIR seems to capture aspects of social organization on a regional and local level. However, other aspects of local integration tend to be associated with other factors, i.e. with stakeholder influence (factor 7 STAKE) and social cohesion (factor 9 SOC). The issues of social integration – originally at the center of WG5 - appear to be distributed over quite different factors.

Cross-cutting Themes: Science&Information, Technology and Ethics

The categories (7-9) of technology, science and ethical issues were included as cross-cutting themes. In fact, they emerge as quite independent (cross-cutting) factors. The notable exception is information which is integrated into evidence-based inclusive governance (factor 1 GOV).

Concerning technology, it is noteworthy that the factor TECH has a strong relationship to individual capabilities (e.g. Q0.2).

Concerning ethics, it is somewhat surprising that inclusive policies (Q.03) are generally included in factor 4 ETHICS. However, more specific themes addressing social inequalities are apparently interpreted more as political issues or social issues placing them into “inclusive governance” GOV or “social policy and civil society” SOC.

5 Discussion: Toward a conceptual framework for the SRA

Obviously, the categories are not reproduced in the factor analysis in any straightforward way. This raises questions whether the WG themes do structure the effects of demographic change on societies effectively. We come back to that issue, but, first, we want to look at the relationship between the emerging factors and the SOAB model.

5.1 The SOAB model and the survey results

Comparing the SOAB model and the factor structure we project the factors onto the SOAB model. The result is depicted in Figure 3 which contains the 3-level structure for orientation.

A number of observations can be made:

First, “inclusive governance” (GOV) occupies the place of public welfare provision *and* governance. We recall that the factor combines welfare systems and policies with inclusive policies reducing social inequalities. Governance is, at the same time, seen as evidence-based policy incorporating science and information systems. While labor market policies are seen as part of welfare policies, other economic issues of welfare production are combined in a distinct economic factor (ECON) which reaches also into the (meso) level of good practices and efficient care services.

Second, on the (meso) level of social integration of society we find three factors sharing the themes of the organization of living environment and civil society or social cohesion, combining it with a meso-level of governance, namely, a perspective on public, private and voluntary stakeholders. “Top-down” governance is distinguished from “bottom-up” influence on policy making. Urban planning of housing and the physical and social environment is an important domain of regions and municipalities. Civil society, work-life balance and the integration of inequalities and diversity are the objectives of local social policies. Missing on the meso-level is a distinct factor of social inclusion, social inequalities and cultural diversity. Part of the problem is that social values and cultural diversity were only addressed in conjunction with other themes (e.g. “the effects of XYZ on inequalities”); these themes, for instance “inclusive government”, “absorbed” the issue of inclusion.

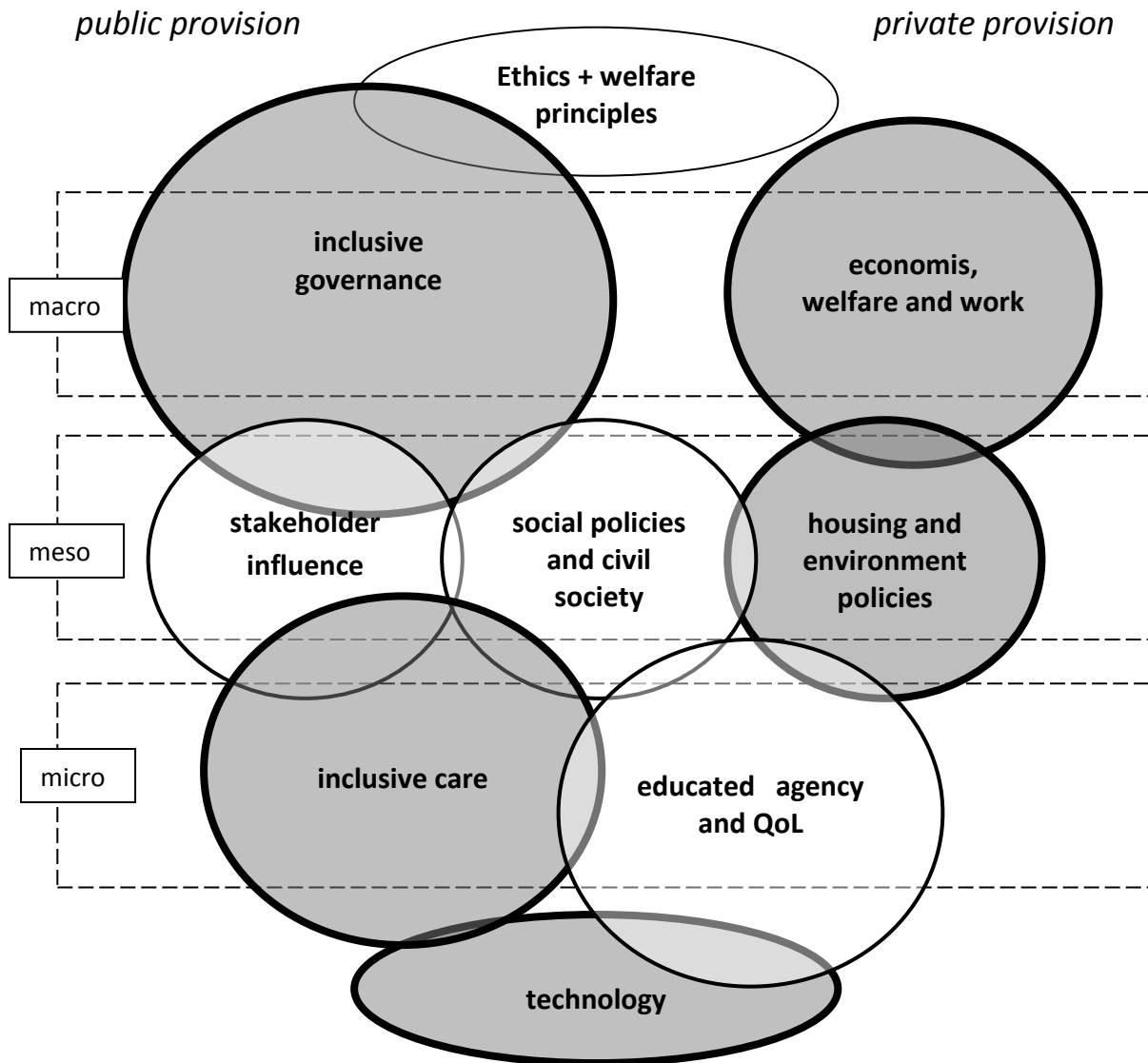
Third, two factors – CARE and QoL – focus especially on the interface of the individual with the level of social integration. Two issues addressed in the WG reports – health and education – dominate these factors and they both focus on QoL. Social and health care services are obviously seen as an inclusive public responsibility, but they also are related to the work-life balance and gender equality of males and females. The special needs of vulnerable older persons are a central concern. The factor QoL describes an educated agent of his/her life with self-determination and mobility who contributes also to the QoL of others in the community. The capabilities of the individual are enhanced by a relation to technologies and social innovations.

Fourth, technology is seen as an important independent, cross-cutting factor in coping with the challenges of demographic change, but it also is acknowledged as an important aspect of empowerment (not only) of older persons.

Finally, ethical issues and social values emerge as an independent factor which addresses the value-orientation in public and private welfare provision, technological and social innovations, and QoL. Recall that social inequalities are partly considered political or social concerns, but still ethical issues are “voted” to have priority, if not the highest priority which they might have in a more principled perspective.

Figure 3: Clusters of themes in the survey based on factor analysis

(shaded circles indicate clusters which are ranking above the mean (3,83) in relevance as measured by the relevance of their characteristic questions; the size of the circle roughly indicates the relative importance of the cluster in explaining the pattern)



Thus, some basic features of the SOAB model (see Figure 2) receive support from this analysis of the underlying factors in the priority “voting” for research themes. We can ask, additionally, what the relevance or priority of these underlying factors is referring again to five corresponding themes with highest priority. In Table 3, the mean relevance of the factors is indicated: Compared with an overall mean of all themes (3,83), economics, environment, governance, inclusive care, and technology have above average priority, while civil society, stakeholders, QoL, and ethics are below the average. (Note that again only the five top themes are counted to avoid a too strong influence of some very low priority.) Somewhat surprisingly, the

issues of urban planning and living environment (ENVIR) show a relatively high priority, ranking even above governance. This speaks again for the importance of the meso-level in the SOAB model.

5.2 Societal Relevance of research themes in the study

The priorities of certain research themes can be inferred from their “votes”. We have seen that there are quite informative differences between the three groups of respondents. The SOAB members – unlike the other two groups – have placed high priority on themes related to the regional and local level of coping with demographic change.

The priorities can also be seen in the context of the “landscape” of society on three levels. In this perspective, we have shown that issues concerning welfare economics, the living environment, governance, inclusive care, and technology are attributed relative higher priority.

The priorities can, finally, be associated with the aim of societal relevance as introduced above. In this perspective, we have to identify themes which can be interpreted to be connected (predominantly) to one of the four dimensions of societal relevance. We, then, can apply our “voting” approach again and look for the mean relevance of those themes.

The identification of themes belonging to one of the dimensions could go back to the original strategy of selecting questions for each category. Unfortunately, one of the results of the factor analysis is that the respondents in many cases saw the questions in a different light. Therefore, the questions acquired often a quite different meaning looking at their relationships to the factors. Perhaps even more important, the structure of the categories dominated part of the factors; after all, they grouped the questions as belonging to a common theme.

Moreover, we have to conclude that the differentiation of levels – welfare system, social integration, individual QoL – interfered with the emergence of the four dimensions. The problem is perhaps most pertinent in the case of social inclusion and cultural diversity. The themes were absorbed by four different factors – inclusive governance, inclusive care, civil society, QoL – besides belonging to the ethical issues. These factors spread over all three levels of the model. The themes could not “decide” – like in the case of politics, economics, or even social cohesion – to which level they mainly belong. So ethics and social values ended up “on top”, while a genuine factor comprising social values and cultural diversity on the level of social integration did not emerge and appeared in “inclusive government”.

Taking this into consideration, we still can argue that the four dimensions of societal relevance and societal sustainability are adequately represented by the factors. Governance and economics are readily associated with politics and economics respectively; ethical issues clearly represent social inclusion. Only in the case of social cohesion, we have to agree that actually all three factors on the meso-level contain important elements of social integration. As stated above, QoL comprising health (CARE) and education (QoL) should be treated as a distinct criterion of outcome quality; technology is included separately as cross-cutting theme.

Following again the “voting” approach, we can select the five highest priority “votes” from each factor, and the five highest from the three meso-level factors combined. We also suggest that we translate the means back into statements of low, moderate or high priority.

To define the border between high and moderate we suggest the lowest value reached by one of the top five themes in the groups: “top fives” all had a medium of 4,14 or higher. The border between moderate

and low can similarly be defined as above the highest value achieved by the lowest five: “lowest five” reached values of 3,50 or lower. (This rule might work with the “voting” approach in this study; it certainly is no substitute for a more sophisticated measurement of societal relevance.)

Following this rule, the dimensions have a relevance of

governance	moderate
economics	high
social cohesion	high
social inclusion	low

This means that – in general – those research themes which address themes related to a given dimension of societal sustainability received a relatively higher or lower priority:

- it may be not surprising that economic relevance got the highest priority;
- it is somewhat unexpected that social cohesion (or social integration) was valued highly relevant;
- it is somewhat discomforting that research on social values or social inclusion were clearly ranked lower.

Calculating the overall relevance is not meaningful, since there is no other challenge to compare it with. As reported above, the challenges of the economic crisis, the ecological crisis, or social inequalities were named as challenges with higher priority. The first two are not included in the survey; for the latter we have to raise some doubt in view of the results above, whether the challenge of rising inequalities really is considered so pressing by all respondents.

5.3 Comparing the SOAB model with the overarching themes of the draft SRA

In a last step, we want to bridge between the SOAB model and the results of the survey, on the one hand, and the current discussion on the SRA, on the other. Two basic decisions are determining the on-going development of the SRA:

- (a) the 5 WG reports provide the basic scientific analyses for the SRA
- (b) the overarching themes are identified as governance, sustainable welfare, economic and social productivity, and well-being and QoL

Concerning (a), the survey directly builds on the WG reports by selecting the questions from the reports (and from FUTURAGE). The WG themes are also incorporated as 6 of the categories of the questionnaire. The results should be interpreted as reflecting – to some extent – the structure of the content of the WG report.

Concerning (b), the overarching themes were not available at the time of the survey. Instead, the discussion in the SOAB was focusing on recommendations for the SRA. The attempt to sketch out a conceptual framework for the recommendations and the survey led to the SOAB model, which - in different versions - was also presented to the SAB and the GA for discussion. Distinct features of this so-called THL approach were

- a 4-dimensional framework for the “landscape” of society, societal relevance and social sustainability and the effects of DC, and
- the incorporation of a hierarchical, 3-level structure.

The distinction of levels was also strongly endorsed by the SOAB, since stakeholders see themselves and are seen by others as operating on the meso level between national “top-down” policy making and the individuals and social groups trying to influence policies “bottom-up”. Societal relevance of DC is, thus, determined especially by the effects it has on the mediating processes within and between all levels. To capture this complexity, the SOAB model had to be more differentiated including explicitly the meso-level and the 4-dimensional framework. The discussion of the SRA tended to confront structural problems of the

welfare system (macro) with their individual outcomes (micro) for older persons (although the WG reports are also making further distinctions).

Trying to consolidate the SOAB model with the 4 overarching themes, we suggest to elaborate the overarching themes with sub-themes using the SOAB model. As Figure 4 shows, the 4 SRA themes can be interpreted as interlocking broad perspectives, which structure and summarize the content of the SRA on a more abstract level:

Sustainable welfare	would research DC especially as to the relationship between public and private provision of welfare, the sustainability of different solutions and their evaluation in view of basic principles of the welfare society such as intergenerational equity.
Governance	would research DC especially as to the effects on policy making and policy doing on all levels both “top-down” (e.g. effective implementation) and “bottom-up” (e.g. democratic representation and empowerment) with a focus on social rights, social inclusion and social inequalities violating basic rights.
Economic and social productivity	would research DC especially as to the effects on economic innovation and productivity in all spheres of production and work, i.e. public, private and voluntary organizations as well as household and individual activities; before and after retirement; as paid and un-paid work.
QoL and well-being	would address DC especially as to the effects on QoL and well-being and on the conditions for the individual “pursuit of happiness” such as effective social and health care and open access to education and learning over the life course. Well-being would focus more on the subjective experience at a given time; QoL would refer more to the objective capabilities of individuals over their life course. QoL should be considered not only as a policy outcome, but also as an input which determines the functionality of future welfare production on all levels. Empowered individuals participate in the (co-) production of social welfare in everyday life and their living environment.

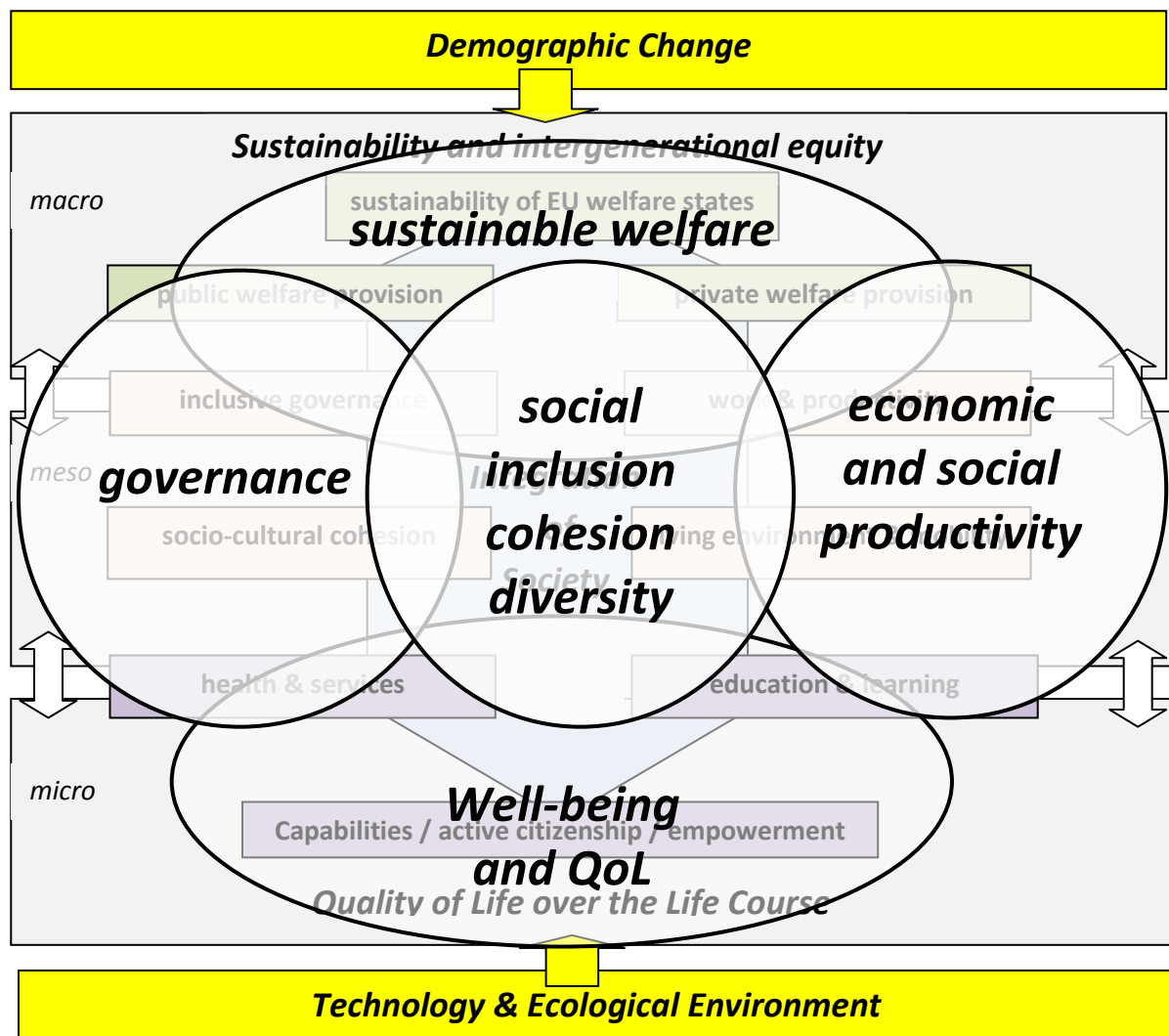
The problem with this solution is that the important “inner core” of social integration is missing and has to be distributed over the four overarching themes:

- sustainable welfare has to reach down to include different “welfare mixes” and public support for informal social and health care;
- governance would have to explicitly address the different levels and stakeholders in the policy and decision making process including the participation *within* organizations and institutions;
- economy and social production has to include large parts of the civil society to describe effects of DC on voluntary work also after retirement;
- QoL has to reach up to comprise socio-cultural ways of life and the diversity of sub-cultures including issues of social integration in communities and networks; social cohesion appears in this perspective as individual-centered quality rather than as a quality of the community;
- the important meso-level of decision making and planning in organizations, of planning of services and infrastructures, housing and enterprises on the regional level is not explicitly addressed, although the impact of DC will be substantial and quite different from higher levels.

Considering the heterogeneity and complexity of the issues, it is not conceivable – at this point – how this can be achieved convincingly within the 4 overarching themes. A framework which acknowledges a overarching theme of “social inclusion, social cohesion and diversity” between those themes and recognizes technology and social innovations as additional cross-cutting theme would be more adequate in light of the results of the survey.

The recognition of hierarchical levels, a life course perspective, welfare principles, societal relevance (political, economic, cultural, social aspects), technological and social innovation, and environmental constraints as cross-cutting considerations would spell out the “holistic and systemic approach” guiding the SRA. The acknowledgment that the effects of DC will open up new opportunities as well as posing challenges for the future of our welfare societies should encourage us to specify an vision of living a long, healthy and active life and conduct it with dignity over the whole life course.

Figure 4: Projecting the SRA overarching themes on the SOAB model



6 Conclusion

The aim of the JPI-MYBL survey on research themes of DC was to support the development of the SRA by a “virtual vote” of its members on the relevance of selected research themes. The perspective was from a political, organizational, and practical view point; the evaluation of scientific relevance will have to proceed from criteria of the scientific community. To keep them apart at this stage was the rationale for not including the members of the Working Groups (WGs) and the Scientific Advisory Board (SAB).

The survey could profit from work of the WGs (and FUTURAGE) especially by their providing a broad scope of research themes and analyses which laid out the field of relevant concepts and topics. A model of the important realms of societies which are affected by DC – the SOAB model - was introduced to guide the selection of a comprehensive set of research themes. Following a logic of “voting”, the “top five” and the “lowest five” were determined for assessments of the priority of each theme. Interestingly, the 3 participating groups – SOAB members, GA members, and national experts – had clearly differing opinions on the relevance of themes:

- For all respondents, economic and technological themes showed the highest priorities, while ethical issues clearly received low priority.
- SOAB members displayed a notably different pattern. Themes which are “closer to home” like the living environment and housing policy have priority combined with a priority for integrated social and health care. Interestingly, economic and political considerations are issues with low priority.
- GA members chose a rather broad spectrum of economic, technology and health themes including themes with a reference to social inequalities. Still, ethical aspects rank low, so does - quite surprisingly – the measurement of policy outcomes.
- National experts show a somewhat higher priority for technological over economic themes, and they clearly see a priority for a better work-life-balance and integration of older persons into the workforce. One is tempted to conclude that they envision for themselves the benefits of a longer working life as experts. Ethical issues, again, have low priority as have options for unpaid work – apparently not a priority for experts.

These results should motivate to respect in the formulation of the SRA the different perspective on societal relevance by different stakeholders. Also the implementation of the SRA will have to reckon with different interests on different levels of the implementation process. Clearly, different stakeholders were perceived as holding influence on the EU, national and regional/local level.

An analysis of the underlying patterns structuring the responses revealed 9 factors which could be interpreted pretty well within the framework of the SOAB model. This gave additional support to arguments for the recognition of hierarchical levels, a life course perspective, welfare principles, and dimensions of societal sustainability and societal relevance (political, economic, cultural, social), as well as technological and social innovation, and environmental constraints as cross-cutting considerations in the elaboration of the SRA. Moreover, the current 4 overarching themes for the SRA – sustainable welfare, governance, economic and social productivity, and Well-being and QoL – could be interpreted as more abstract perspectives on the SOAB model and the results of the survey.

However, the results of the study speak clearly for acknowledging the distinct importance of an additional overarching theme “social inclusion, social cohesion, and cultural diversity” do to justice to the relative independence of a meso-level of society. The importance of this realm in societies translates into a specific research field for DC, since the effects of DC are quite different on different levels of society.

If the survey and this report have the effect of enriching the discussion on and development of the SRA of JPI-MYBL, then it will have achieved its aim.

8 Annexes

8.1 Societal priorities for research themes – an overview

8.3 Factor analysis of "votes" on research questions

see Part 2 8.3 Responses in %

8.4 Questionnaire

8.5 References

Annex 1: Societal priorities for research themes – an overview

Categories and questions with mean of responses; Scale: no priority 1 - 2 - 3 - 4 - 5 very high priority; Number of respondents N=44; The “top-ten” (shaded, bold) and “lowest ten” (bold) are marked (lowest 11 due to same mean)	dimension of societal relevance: E economic I inclusive P political C cohesive X not classified
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	all respondents N=44	mean / dimension
0. To begin, we would like you to indicate below: What kind of policies should have priority – from your perspective – to cope with demographic change?		4,19
0.1 Policies which ensure economic welfare and security for all generations in the future.		4,36 E
0.2 Policies that develop the capabilities of people over the life course through health, education and participation.		4,52 P
0.3 Policies that protect social rights and reduce social inequalities for all generations in the future.		4,07 I
0.4 Policies that support social relations, trust and solidarity between younger and older generations.		3,82 C
From your political, organizational or practical perspective: 1. How important is research on the sustainability of the welfare state in Europe?		3,80
1.1 How can we ensure that social welfare systems will continue to provide social and health care, social security benefits and pensions as well as adequate incomes and employment in the future?		4,61 E
1.2 What is the most effective “mix” of private, public, voluntary, and informal services in countries with different welfare traditions?		3,95 E
1.3 In cases of mobility of providers and consumers: How can we improve the transferability of welfare benefits between different European social security systems?		3,45 E
1.4 How can we ensure that both younger and older persons are able to participate in decision making and to voice interests concerning their lives on all levels (household, institutions, community, national, EU)?		3,45 P
1.5 To meet the challenges of globalization: How could responsibilities and capacities of welfare policies be better organized and distributed between political and administrative levels (European, national regional, local)?		3,52 P
From your political, organizational or practical perspective: 2. How important is research on social life styles, social services and social policies?		3,87
2.1 What are the effects of demographic change on our life styles including differences in gender, and cultural and ethnic diversity, and socio-economic inequality?		3,70 I
2.2 How can we combine periods of work and retirement, training and education, family and care, leisure and voluntary activities, and engagement in public and political life in new and flexible ways over the life course?		4,14 C
2.3 How can we improve the effectiveness and efficiency of public and private services in order to increase quality of life?		4,14 X
2.4 How are social inclusion or exclusion and discrimination on the basis of age “institutionalized” in laws, policies and social norms in European welfare systems and what regulations do we need for the future?		3,63 I
2.5 How can we strengthen engagement in civil society and support voluntary, self-help and charity organizations by policies on all levels of society?		3,70 C
From your political, organizational or practical perspective: 3. How important is research on health promotion and social and health care over the life course?		3,89
3.1 How can the interdependence of biomedical, psychological and social factors of health over the life course be better addressed by integrated strategies of assessment, treatment and care?		4,07 P
3.2 What are the conditions and risks for a long, healthy and active life due to socio-economic and gender inequalities, cultural differences, and life styles?		4,05 I
3.3 How can the special needs of older persons with chronic frailty and physical or mental disabilities be best addressed in social and health care?		4,26 C
3.4 In case of very old age, serious illness and the end of life: How should we decide on adequate goals for treatments in ways respecting the client’s views on his or her quality of life or end of life?		3,76 I
3.5 What are the challenges and opportunities of increasing migration of care workers and “tourism” of health care consumers for coordinated social and health care system in Europe?		3,29 E

From your political, organizational or practical perspective: 4. How important is research on work and productivity in paid and unpaid work over the life course?	3,79
4.1 How is the productivity of work affected by an ageing labor force on the level of the economy, on the level of work organization, and on the level of individual qualification and training?	3,93 E
4.2 Considering retirement and early retirement in different countries: What are the effects of different retirement regulations and how should social policy regulate opportunities for work after retirement age?	3,93 P
4.3 How can public and private employers be motivated by regulations and/or incentives to employ and to adequately integrate and to promote both the youngest and the oldest age groups in the future?	4,17 E
4.4 Considering their different views on welfare policies: How do public, private and voluntary stakeholders in the economy influence policies for the adaptation of the labor market to demographic change?	3,44 P
4.5 How can we use the productivity of un-paid work by males and females more effectively over the life course while respecting individual needs and principles of gender equality and social justice?	3,49 I
From your political, organizational or practical perspective: 5. How important is research on education and learning over the life course?	3,81
5.1 How does education and learning over the life course increase the economic contribution of older people in working life or in productive activities after retirement?	3,88 E
5.2 How does education and learning over the life course increase the quality of life of older persons and their non-economic (i.e. personal, social and cultural) contribution to others?	3,72 C
5.3 How does education and learning over the life course enhance the capabilities of older persons and increase the quality and efficiency of welfare and health services?	3,83 X
5.4 How can self-determination, autonomy, and political participation of older people be influenced by education and learning over the life course?	3,70 X
5.5 How can education and learning over the life course effectively help to decrease social inequalities, exclusion and discrimination within and between generations?	3,93 I
From your political, organizational or practical perspective: 6. How important is research on housing, living environment and mobility?	3,86
6.1 How can changes in the living environment (e.g. housing, infrastructures, ecological quality) and the social environment (e.g. social networks, neighborhood, community) affect the quality of life of all age groups?	4,12 C
6.2 How do differences in mobility and access to transportation affect the economic, political, social and cultural opportunities of different age groups?	3,67 C
6.3 How is the segregation or spatial concentration of older people in housing, neighborhoods or communities related to social inequalities, discrimination and intergenerational conflicts?	3,63 I
6.4 How can policies coordinate public provision of housing and private housing markets to ensure that the quantity and quality of dwellings and infrastructure are adapted to the needs of demographic change?	4,08 P
6.5 What are the social and economic challenges and opportunities of combining adaptation of the living environment to an ageing population with adaptation for environmental sustainability?	3,79 E
From your political, organizational or practical perspective: 7. How important is research on the impact of technologies and social innovations on demographic change?	3,86
7.1 How can technologies be used to innovate and to optimize the provision of welfare including the organization and delivery of social and health care services?	4,52 X
7.2 How can education and technology enable the competent use of technologies by older people and support older people in participating in public, social and cultural life?	4,16 X
7.3 How can new technology enrich the socio-cultural and emotional quality of everyday life?	3,57 C
7.4 How do new technologies (e.g. internet, social networks) affect the development of common values, principles and policies of welfare systems in Europe?	3,02 I
7.5 How can technologies support new and flexible ways of combining work, education, leisure, family and care over the life course?	3,98 X
From your political, organizational or practical perspective: 8. How important is research on the improvement of knowledge, information and information exchange?	3,71
8.1 How can the exchange of knowledge and experience between sciences, policy makers, practitioners, and interested citizens be organized in ways which enhance principles of welfare and social justice?	3,67 I
8.2 How can the quality and availability of indicators on demographic change be developed, standardized and organized to support comparative research and evidence-based policies across the EU?	3,84 P
8.3 How can we improve understanding and modeling of past and future developments over longer periods of time to evaluate the challenges and opportunities of demographic change in Europe?	3,43 P

8.4 How can comparative research on “good practices” be improved to enable welfare institutions, municipalities and providers to use their own data more effectively and to exchange their experiences?	4,16 C
8.5 How can the assessment of benefits and costs of information systems and information exchange be improved to guide investments on all levels of the “information society”?	3,39 E
From your political, organizational or practical perspective: 9. How important is research on ethics, welfare principles and policy outcomes?	3,37
9.1 Concerning the challenges and opportunities of demographic change: What are the attitudes and values of different groups and generations and how are they discussed in public policies and in the media in the EU?	3,32 I
9.2 How are the goals of social welfare, social sustainability and quality of life effectively determined, measured and implemented in social policies in different EU member states?	3,40 P
9.3 How do different ways (public, private, non-profit) of organizing and financing of social and health care services affect the attainment of goals of social justice, social sustainability and quality of life?	4,05 E
9.4 What is the role of spirituality, religion and religious institutions for personal quality of life and for the adaptation of the welfare state to demographic change?	2,71 C
9.5 How can disagreements and conflicts about social values and ethical principles between groups in society be resolved and which institutions and regulations lead to solutions which are accepted?	3,33 P
11. Summing up:	
How important is the issue of demographic change on welfare and well-being in the EU from your own political, organizational or practical perspective?	4,77 X
Sample mean	3,83

Annex 2: Factor analysis of "votes" on research questions

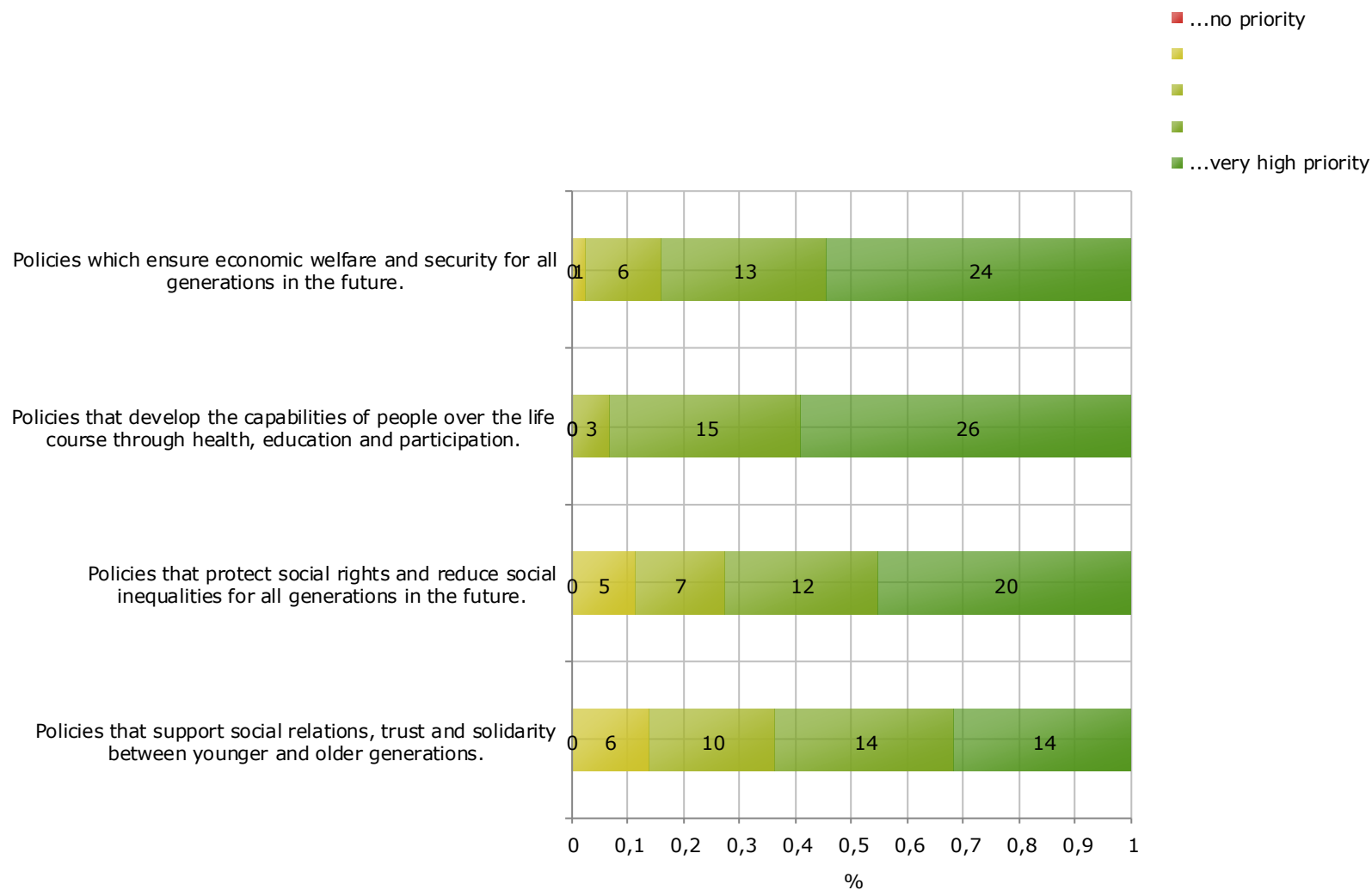
Questions		Component								
		GOV 1	QodL 2	CARE 3	ETHIC 4	ECON 5	TECH 6	STAKE7	ENVIR 8	SOC 9
Q0_1 policies for economic welfare policies			,157		-,322	,620	,174		,239	
Q0_2 policies for capabilities			,349	,305		,341	,380	,372	-,114	,182
Q0_3 policies for social rights			,387	,477	,408	,214		,158		-,425
Q0_4 policies for solidarity		,133	,748	,145	,118				,105	
Q1_1 social welfare sustainable welfare		,106	-,123			,836		,124		-,148
Q1_2 mix of public, private, voluntary		,447		,213			,154	,125	,319	-,241
Q1_3 transferability of benefits		,389	,522		,147		,353			,176
Q1_4 participation in decision making		,443	,346	,471	,148	,247			,102	
Q1_5 policies on different levels		,660	,232	,296		,136	,147		-,138	
Q2_1 effects on diversity social systems		,384	,549	,125	-,120	,116	-,148		,301	,198
Q2_2 work-life balance			,342			,668		-,233	,148	,435
Q2_3 effectiveness of services		-,112	-,300	,352	,144	,327		,216	,424	,173
Q2_4 age discrimination		,450	,208	,161				,156	,185	,533
Q2_5 engagement in civil society		,165	,262	,692	,214		,101		,100	,412
Q3_1 integrated care health		,200	,336	,604			,242			
Q3_2 conditions of health		,378	,342	,498		,363		-,223		
Q3_3 special needs of frailty			-,209	,718	-,121	,427	,117	,204	,101	
Q3_4 adequate goals for treatment		-,152	,256	,690			,232		,300	-,169
Q3_5 welfare "tourism"		,140	,427	,437	,436	,362				,187
Q4_1 productivity of ageing labor work		,632	,197		,119		-,128			
Q4_2 retirement regulations		,552	,142	-,177	,144	,288		-,261	-,244	,351
Q4_3 incentives for employers		,304	-,145			,451	-,162	,408	-,198	
Q4_4 stakeholder influence		,430		,185	,238	,104		,601	-,223	
Q4_5 productivity of un-paid work		,180	,288	,648	,237	-,100	-,246			,211

Q5_1 education and economic contribution	education	,668	,259		,127	,190				,288
Q5_2 education and non-economic contribution		,383	,500	,299	,294	,181	,261		,218	
Q5_3 education and capabilities		,120	,190	,182	,194		,356	,641	,123	
Q5_4 education and autonomy			,741	,203			,108	,198		,197
Q5_5 education and inequalities		,474	,594	,279		-,132	-,111	,257	,170	,135
Q6_1 effects of living environment	housing&mobility	,267	,102	,373	,132		,141	-,476	,515	-,159
Q6_2 mobility and access		,455	,559	,122	,206		,243		,289	-,140
Q6_3 segregation in housing			,444		,167			,587	,403	
Q6_4 public policies for housing			,124			,189	,154		,742	
Q6_5 living environment and environmental sustainability		,329	,263	,153	,252	-,151			,645	,105
Q7_1 technology and services	technology		-,308	,271	-,101		,757		,164	
Q7_2 technology, education and competence			,247				,730		,174	
Q7_3 technology and life enrichment		,143	,278	-,125	,221		,778	,155		
Q7_4 technologies and values		,416		,172	,550	-,129	,569	-,116		
Q7_5 technologies and work-life –balance		,409		,155	,226	,237	,471	-,536		,125
Q8_1 evidence-based policies	science&information	,722			,212				,241	
Q8_2 indicators of change		,581			,376		,141	,304		,103
Q8_3 modelling DC		,837		,131			,189	,190		
Q8_4 "good practices"			-,171	,264	,258	,411	,278	,273		,362
Q8_5 benefits and costs of information		,529		,550	,207		,193			-,181
Q9_1 attitudes and values	ethics	,389	,285		,540					,378
Q9_2 implementation of goals in policy		,241	,218	,158	,431	,277	,291	,111		,259
Q9_3 effects of financing and values			,127		,494	,651		-,108		
Q9_4 spirituality and religion		,226		,131	,804			,108	,117	
Q9_5 ethical conflict resolution		,291	,211	,164	,672	,163		,253	,179	-,142
Q11_1 importance of DC			,548		,238		,251	-,276	-,194	-,113

Extraction method: Principal Component Analysis; Rotation Method: Varimax with Kaiser Normalization converging in 16 iterations

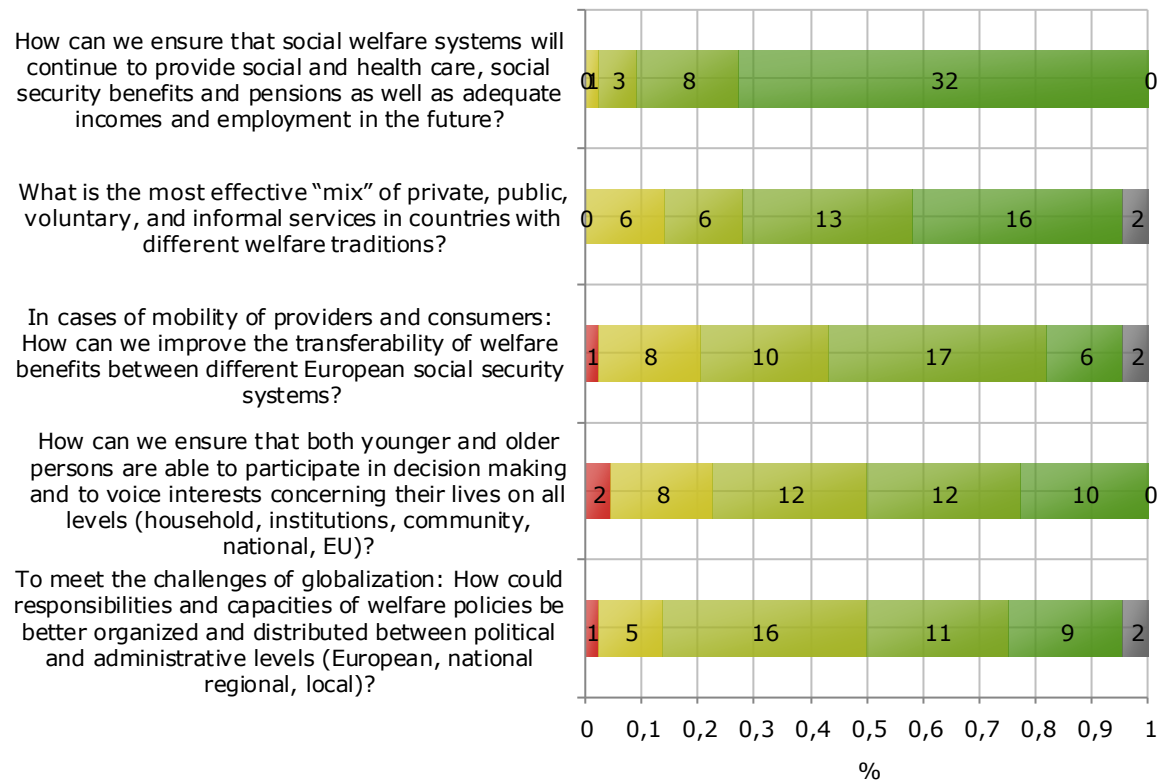
Annex 3: Frequencies of responses

To begin, we would like you to indicate below: What kind of policies should have priority – from your perspective – to cope with demographic change?: These policies have... (N = 44)

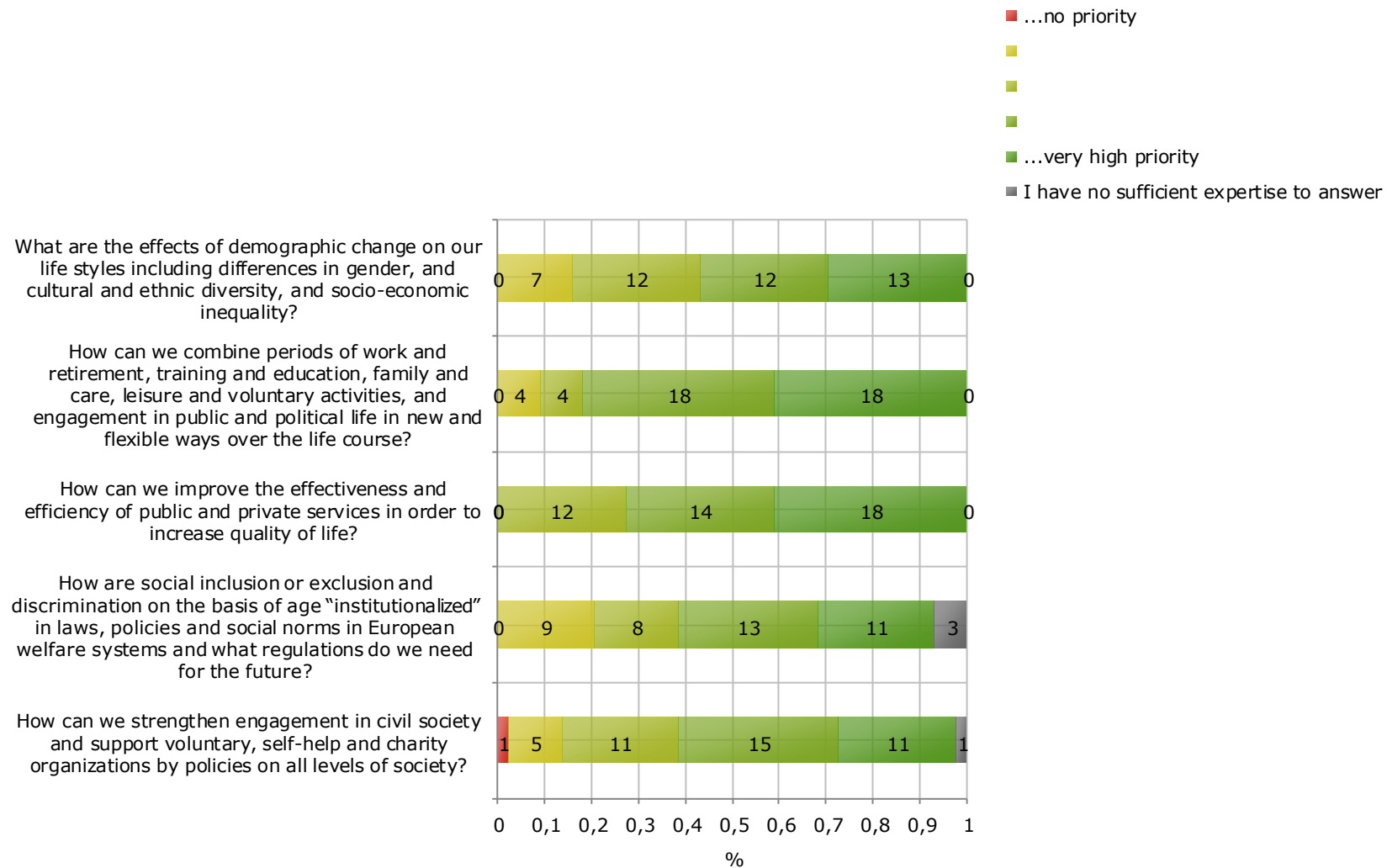


From your political, organizational or practical perspective: 1. How important is research on the sustainability of the welfare state in Europe?: This question has... (N = 44)

- ...no priority
-
-
-
- ...very high priority
- I have no sufficient expertise to answer

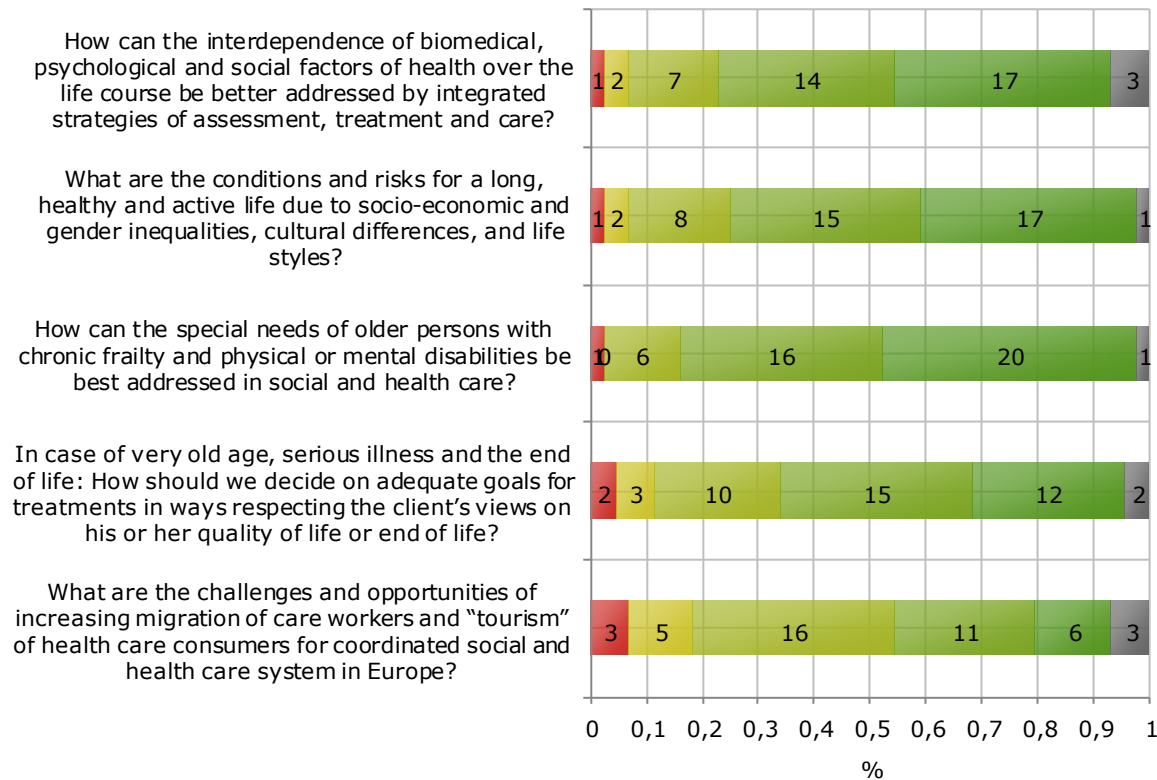


From your political, organizational or practical perspective: 2. How important is research on social life styles, social services and social policies?: This question has... (N = 44)



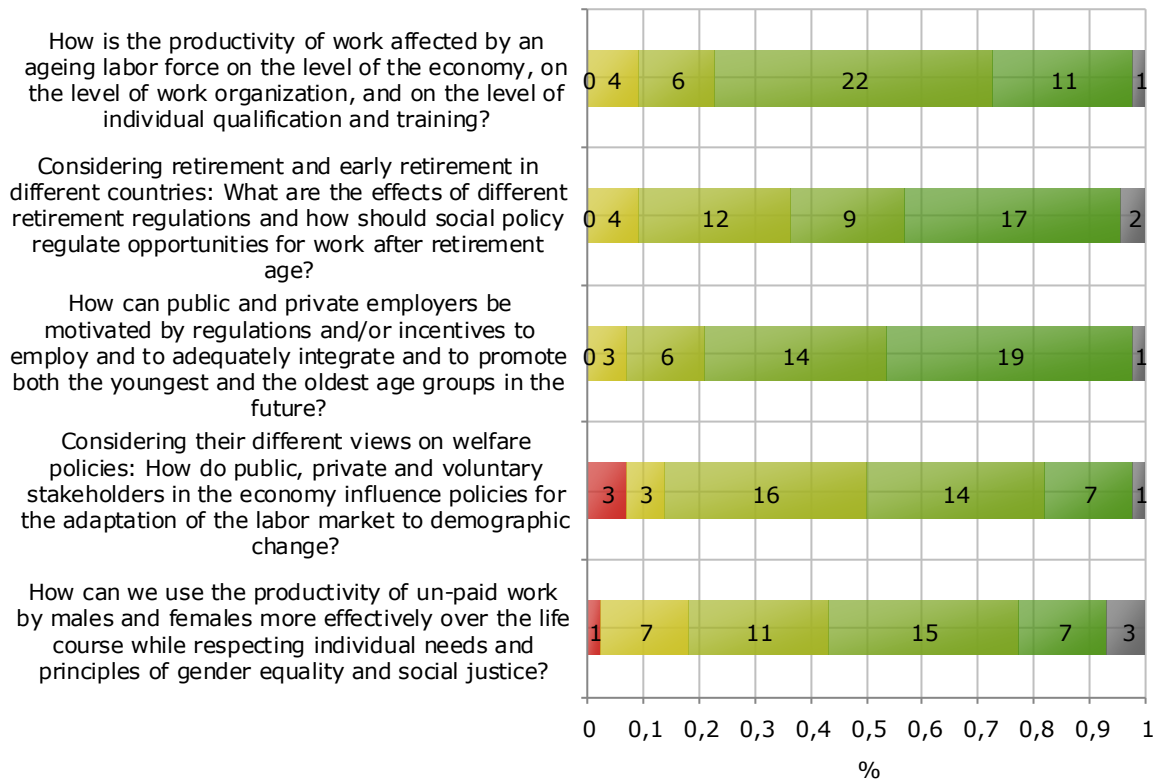
From your political, organizational or practical perspective: 3. How important is research on health promotion and social and health care over the life course?: This question has... (N = 44)

- ...no priority
-
-
-
- ...very high priority
- I have no sufficient expertise to answer



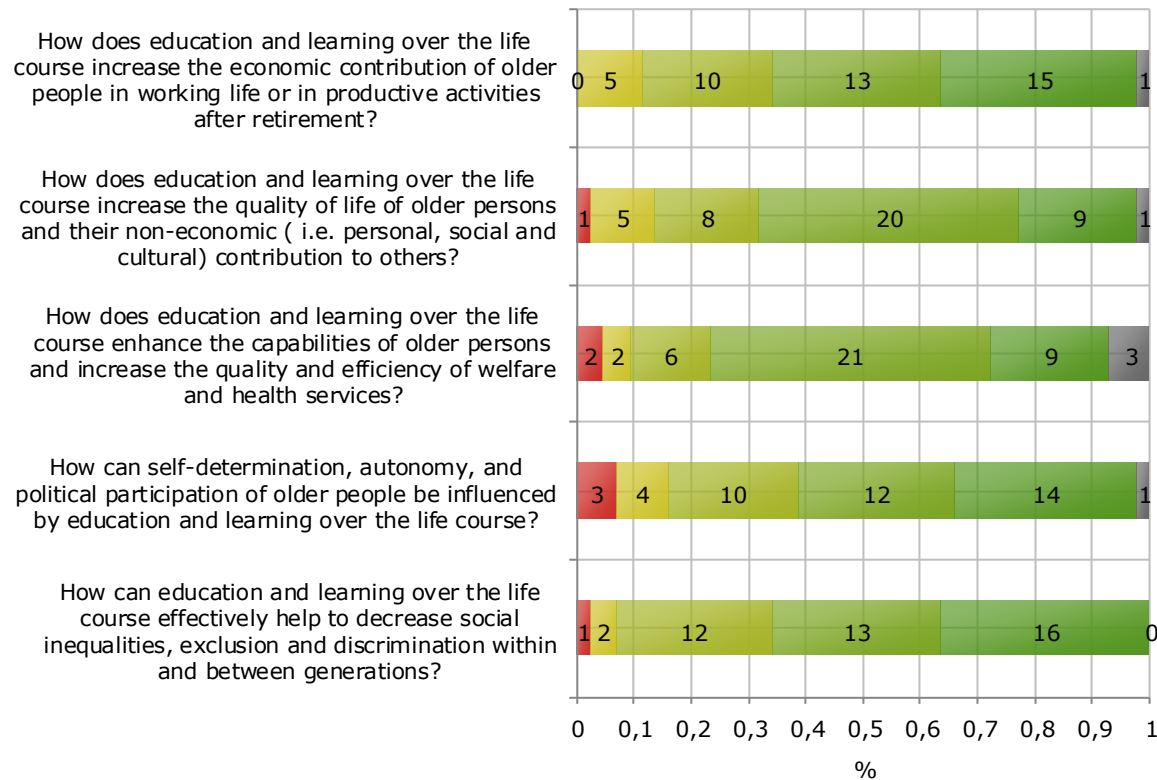
From your political, organizational or practical perspective: 4. How important is research on work and productivity in paid and unpaid work over the life course?: This question has... (N = 44)

- ...no priority
-
-
-
- ...very high priority
- I have no sufficient expertise to answer

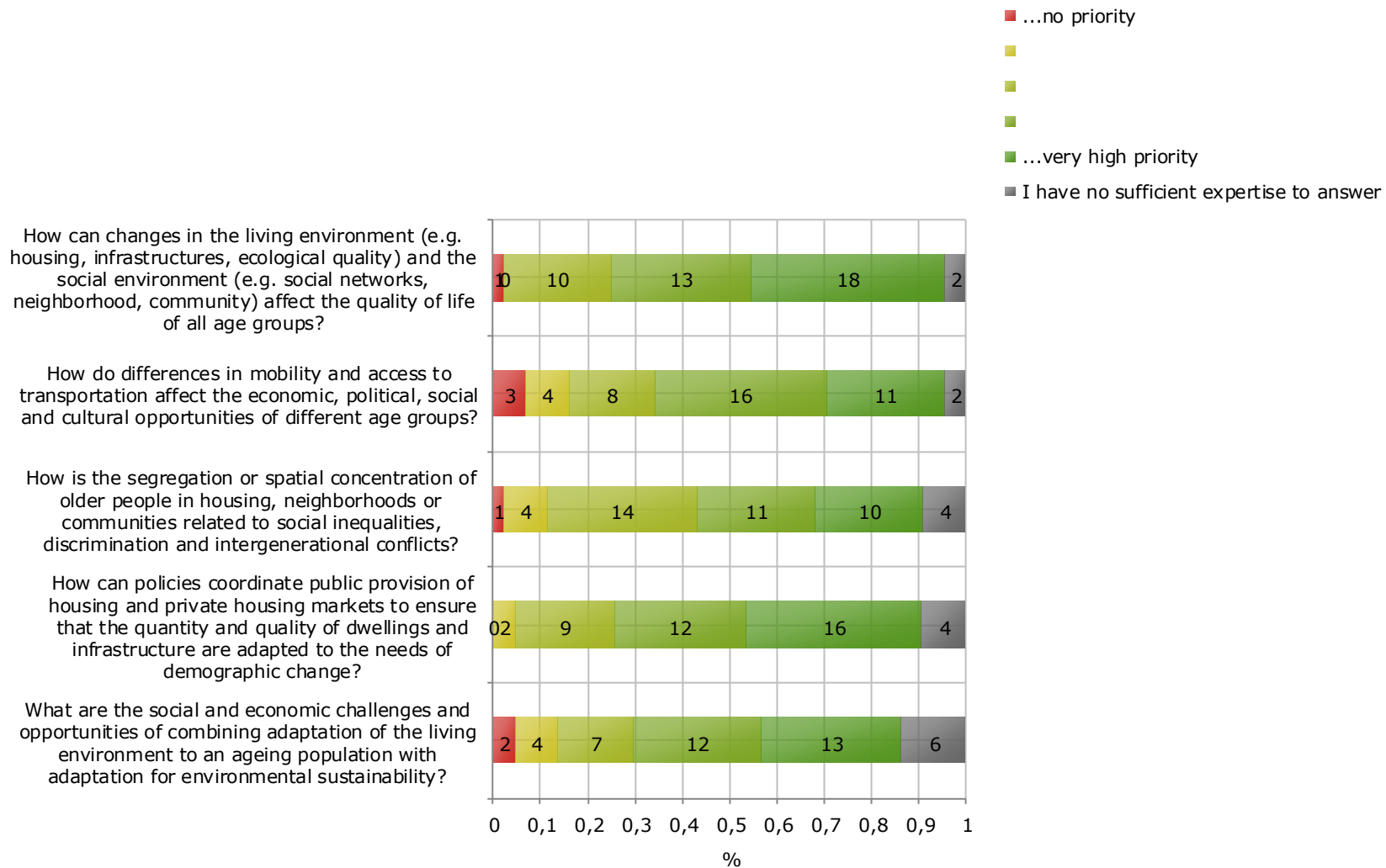


From your political, organizational or practical perspective: 5. How important is research on education and learning over the life course?: This question has... (N = 44)

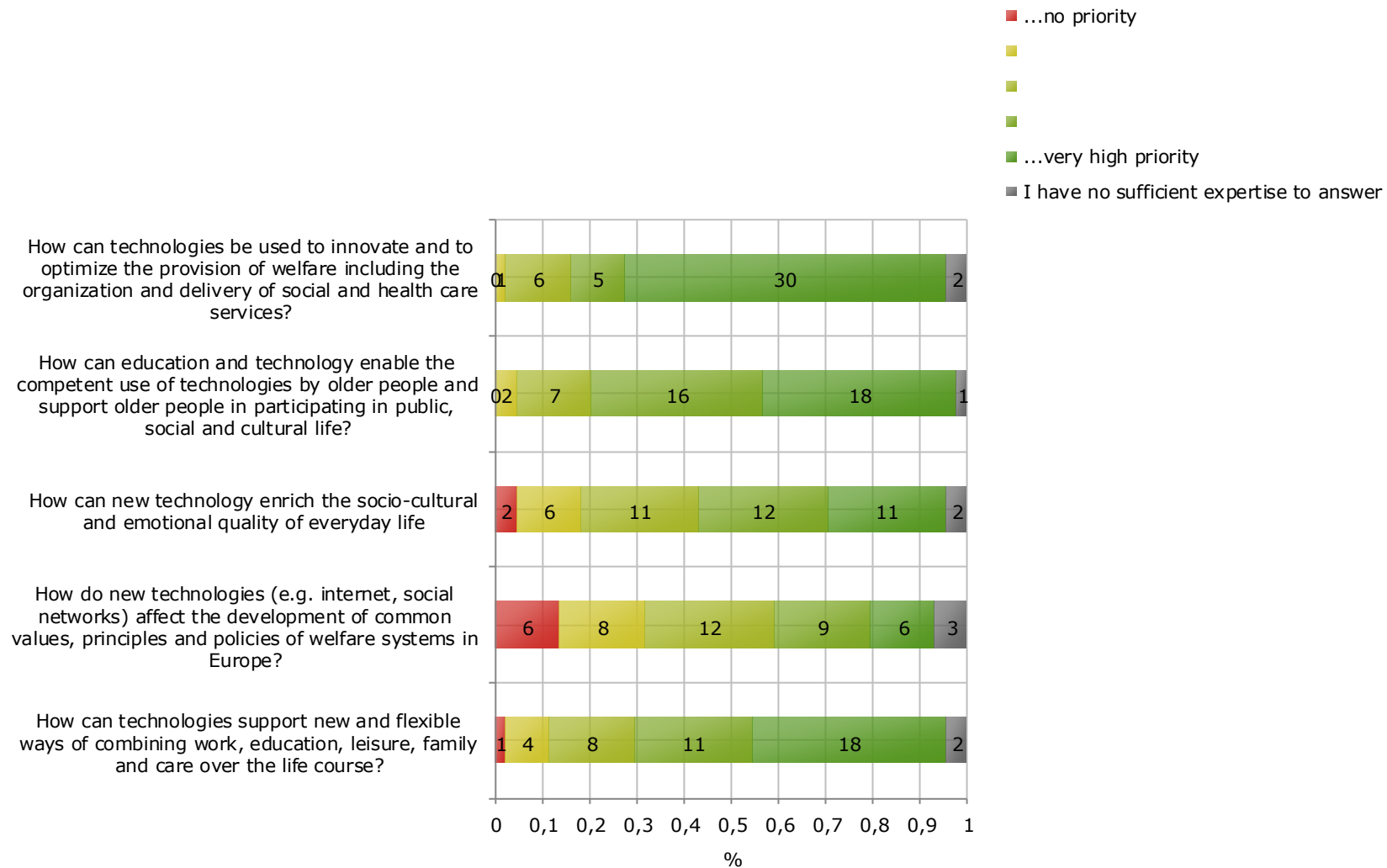
- ...no priority
-
-
-
- ...very high priority
- I have no sufficient expertise to answer



From your political, organizational or practical perspective: 6. How important is research on housing, living environment and mobility?: This question has... (N = 44)

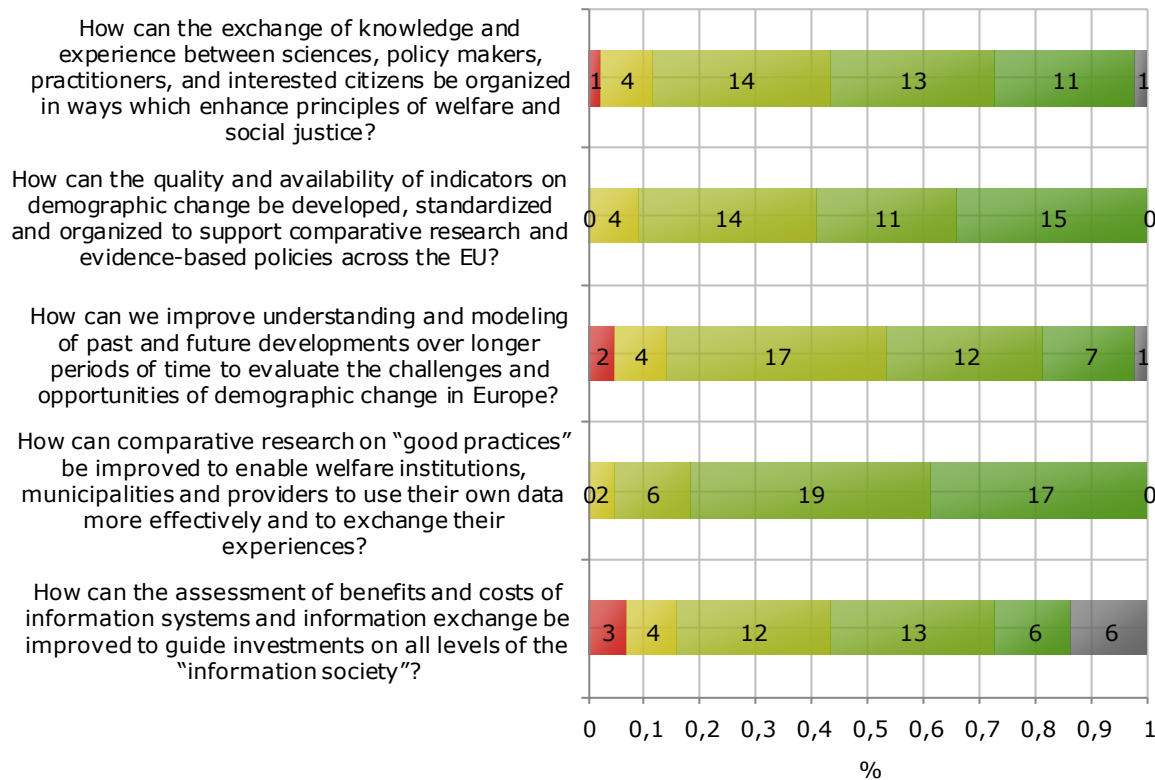


From your political, organizational or practical perspective: 7. How important is research on the impact of technologies and social innovations on demographic change?: This question has... (N = 44)

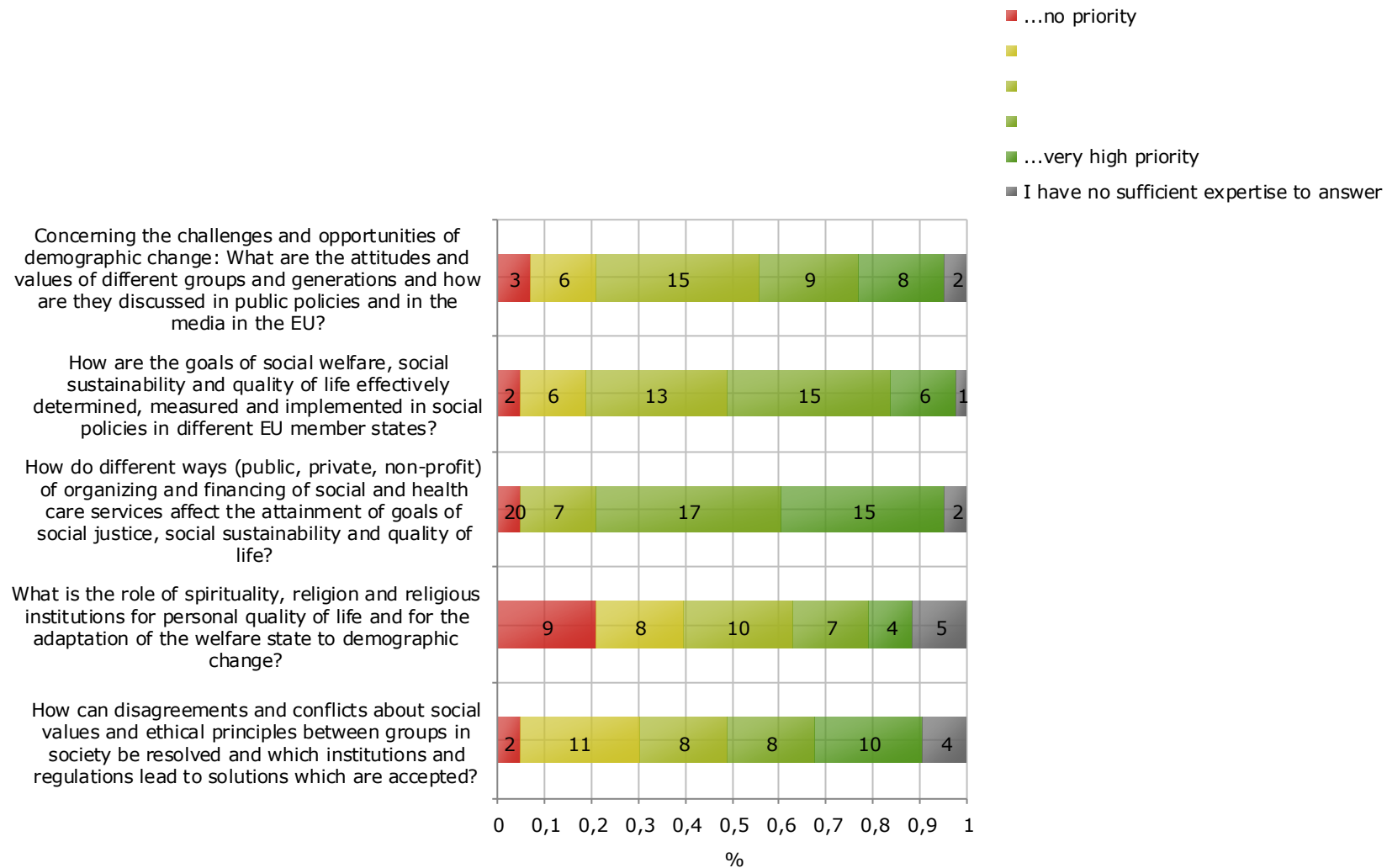


From your political, organizational or practical perspective: 8. How important is research on the improvement of knowledge, information and information exchange? : This question has... (N = 44)

- ...no priority
-
-
-
- ...very high priority
- I have no sufficient expertise to answer

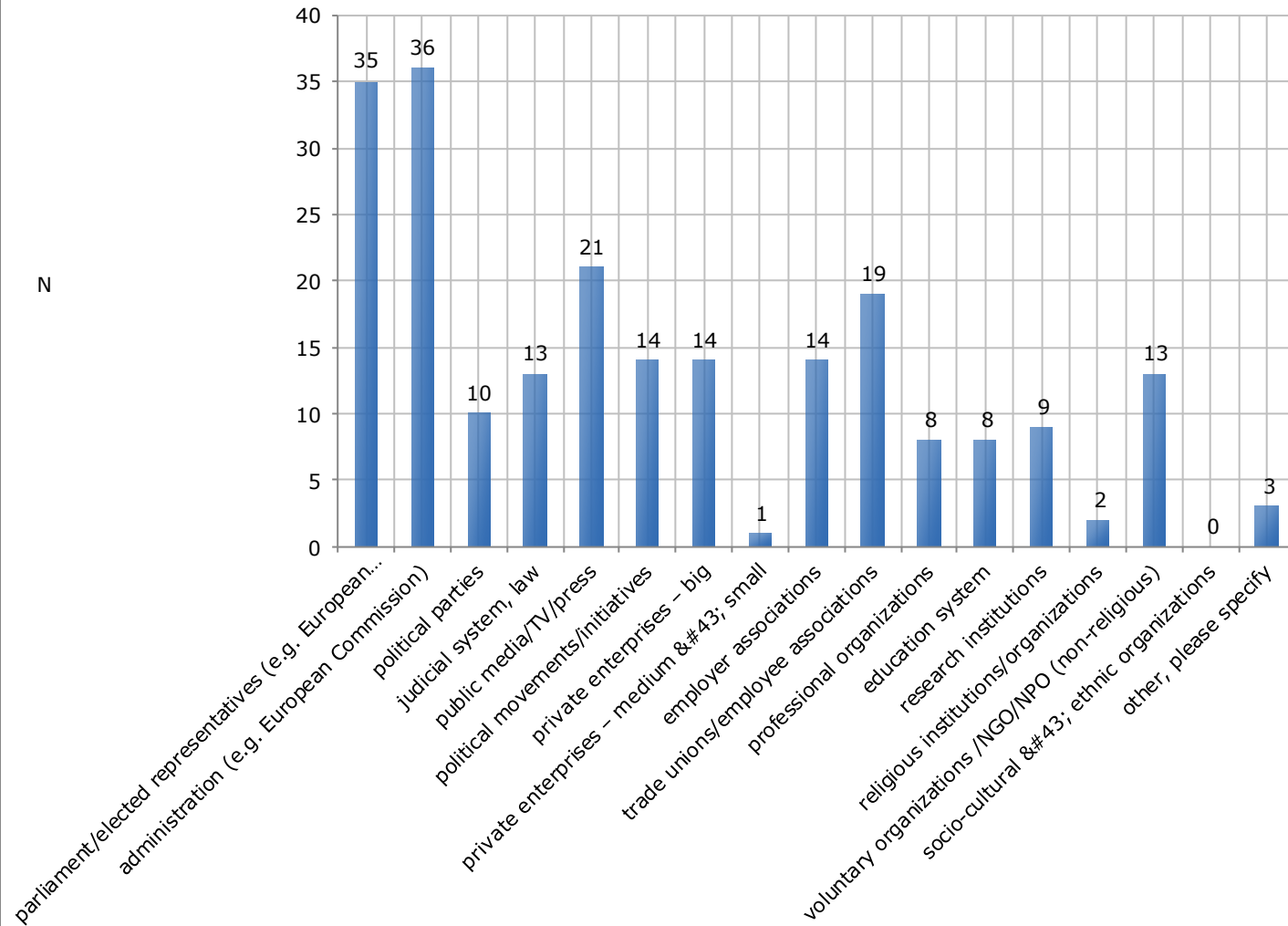


From your political, organizational or practical perspective: 9. How important is research on ethics, welfare principles and policy outcomes?: This question has... (N = 43)

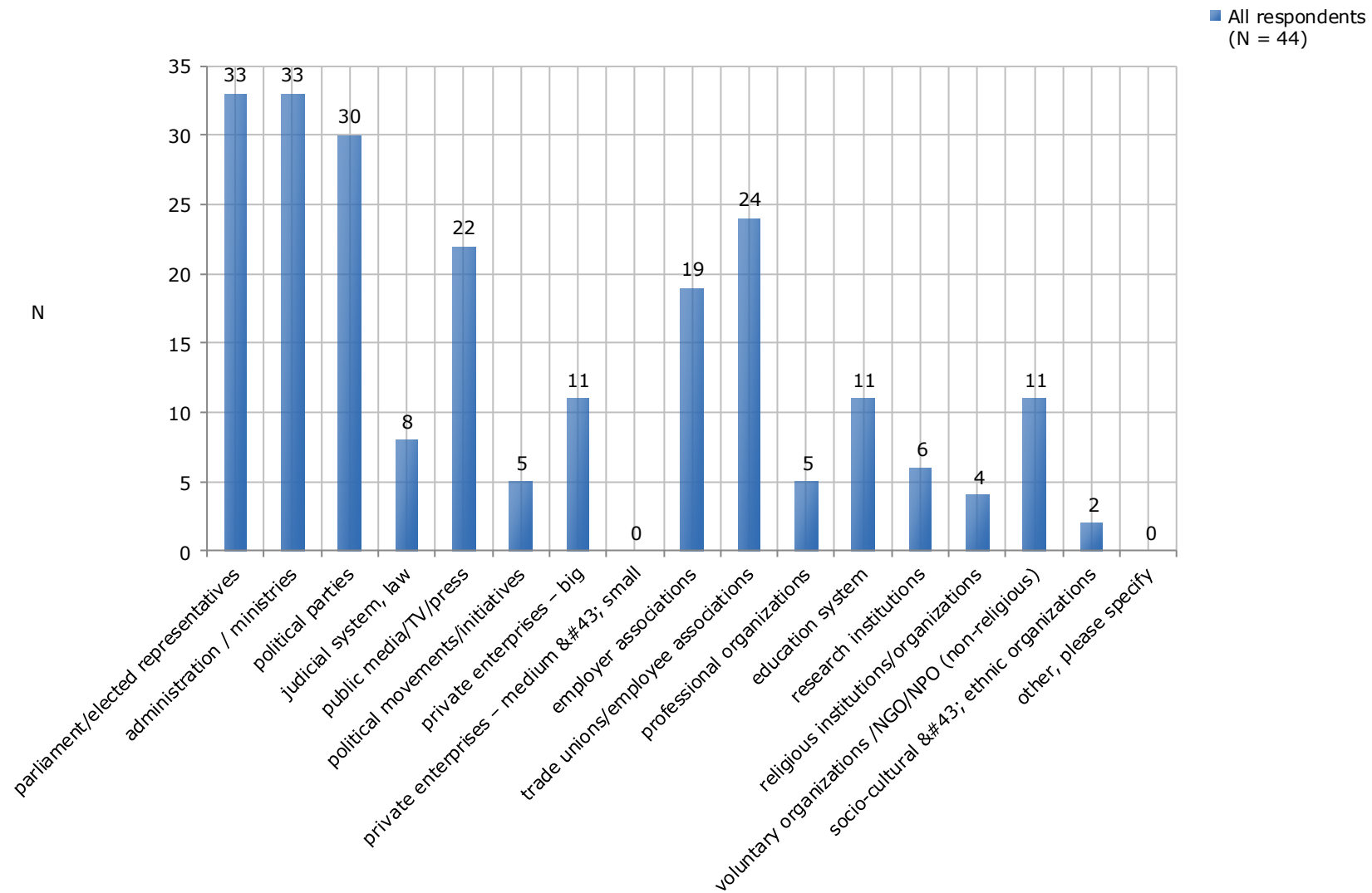


10.1. Please, select five agents on the level of the EU who you consider to have most influence on social policy:

■ All respondents
(N = 44)

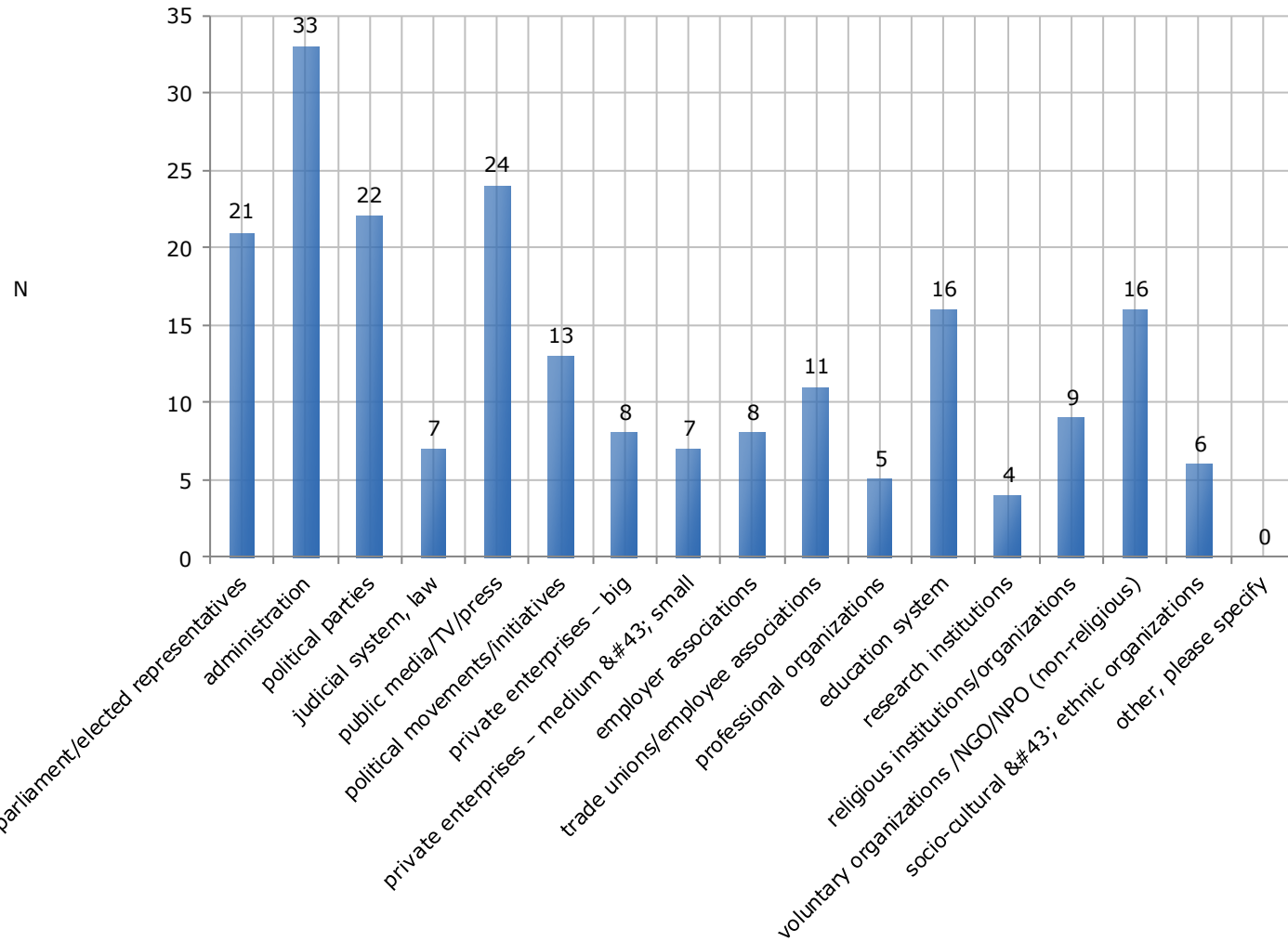


10.2. Please, select five agents on the national level who you consider to have most influence:

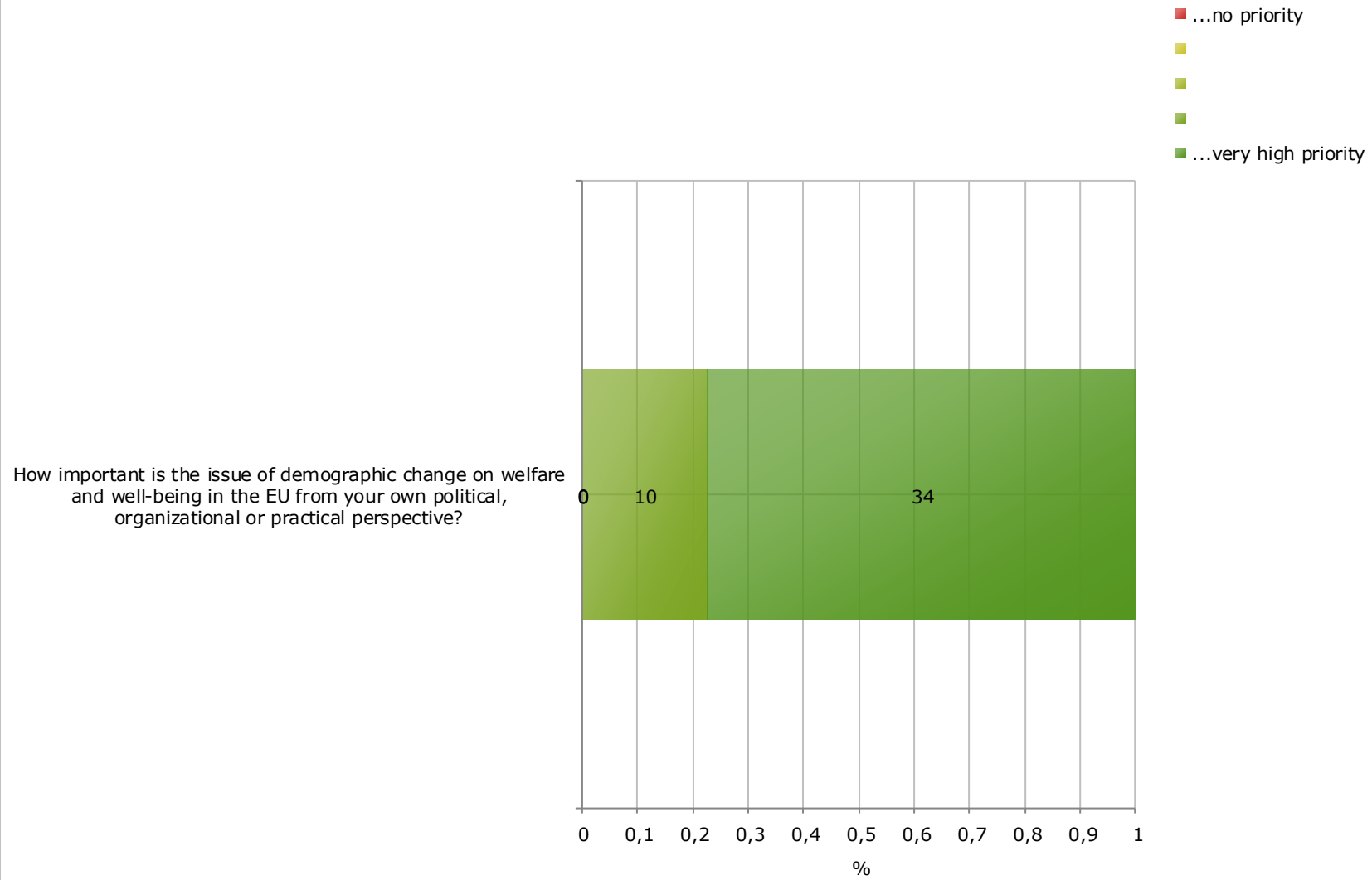


10.3. Please, select five agents on the regional and local level who you consider to have most influence:

■ All respondents
(N = 42)



11. Summing up:: This question has... (N = 44)



Annex 4: The Questionnaire

Demographic Change in Europe

(Final Feb 2013)

Survey on knowledge needs of policy makers and stakeholders

This survey of the Joint Program Initiative “More Years – Better Lives” (JPI-MYBL) aims to support the development of a European Strategic Research Agenda (SRA) on the impact of demographic change on society (see: www.jp-demographic.eu). The SRA will identify important R&D gaps from the perspective of the sciences, but it will also reveal policy makers’ and stakeholders’ knowledge needs on a European, national, regional and local level.

You have been chosen to complete this survey as a member of JPI MYBL, as member of the Societal Advisory Board SOAB), or as a recognized stakeholders or expert in the field of demographic change. Your viewpoints and comments are very valuable for the development of the SRA. So we really appreciate that you take the time to fill in this form.

In this survey we ask you to indicate the importance of different research themes and questions. You are also invited to add own themes or research needs which arise in your field of practice. Please take some time to consider the questions carefully – the quality of the SRA depends also on your response!

Respondent	ID-Number of Questionnaire (to be assigned)
Name:	Affiliation/Organization:
email:	

Your name and address are only important to be able to contact you if needed. In the evaluation of the results we will only refer to organizational affiliation.

The questionnaire should be completed in one session. It should not take more than 30 minute to fill it in.

In the following nine sections you will find examples of research themes or questions which are suggested from the perspective of various sciences. All questions might be considered important, but we ask you to indicate on a scale which priority a theme or a research question should have.

Example:

How can we ensure that social welfare systems are sustainable in the future?

This question has.... no priority ☐☐☐☒ very high priority

Not sufficient expertise to answer ☐

At the end of each section, you will have the possibility to add other themes or questions you would like to include to enrich the scope of the Research Agenda!

To begin, we would like you to indicate below:

What kind of policies should have priority – from your perspective – to cope with demographic change?

Policies which ensure economic welfare and security for all generations in the future.

These policies have... no priority ☐☐☐☐☐ very high priority

Policies that develop the capabilities of people over the life course through health, education and participation.

These policies have... no priority ☐☐☐☐☐ very high priority

Policies that protect social rights and reduce social inequalities for all generations in the future.

These policies have... no priority ☐☐☐☐☐ very high priority

Policies that support social relations, trust and solidarity between younger and older generations.

These policies have... no priority ☐☐☐☐☐ very high priority

From your perspective:

Which other kind of policy is **missing** that should have high priority?

Please, specify:

.....

The following questions are more specific **research questions**, and, therefore, they are difficult to answer.
But the survey does not ask for an answer – this is the task of future research.

In some cases, you might not feel to have sufficient expertise in the field.

Still, try to indicate, if the question addresses from your perspective an important issue and deserves priority.

From your political, organizational or practical perspective:

1. How important is research on the sustainability of the welfare states in Europe?

How can we ensure that social welfare systems will continue to provide social and health care, social security benefits and pensions as well as adequate incomes and employment in the future?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

What is the most effective “mix” of private, public, voluntary, and informal services in countries with different welfare traditions?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

In cases of mobility of providers and consumers: How can we improve the transferability of welfare benefits between different European social security systems?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can we ensure that both younger and older persons are able to participate in decision making and to voice interests concerning their lives on all levels (household, institutions, community, national, EU)?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

To meet the challenges of globalization: How could responsibilities and capacities of welfare policies be better organized and distributed between political and administrative levels (European, national regional, local)?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

From your political, organizational or practical perspective:

2. How important is research on social life styles, social services and civil society?

What are the effects of demographic change on our life styles including differences in gender, and cultural and ethnic diversity, and socio-economic inequality?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can we combine periods of work and retirement, training and education, family and care, leisure and voluntary activities, and engagement in public and political life in new and flexible ways over the life course?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can we improve the effectiveness and efficiency of public and private services in order to increase quality of life?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How are social inclusion or exclusion and discrimination on the basis of age “institutionalized” in laws, policies and social norms in European welfare systems and what regulations do we need for the future?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can we strengthen engagement in civil society and support voluntary, self-help and charity organizations by policies on all levels of society?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

From your political, organizational or practical perspective:

3. How important is research on health promotion and social and health care over the life course?

How can the interdependence of biomedical, psychological and social factors of health over the life course be better addressed by integrated strategies of assessment, treatment and care?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

What are the conditions and risks for a long, healthy and active life due to socio-economic and gender inequalities, cultural differences, and life styles?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can the special needs of older persons with chronic frailty and physical or mental disabilities be best addressed in social and health care?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

In case of very old age, serious illness and the end of life: How should we decide on adequate goals for treatments in ways respecting the client's views on his or her quality of life or end of life?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

What are the challenges and opportunities of increasing migration of care workers and "tourism" of health care consumers for coordinated social and health care system in Europe?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

From your political, organizational or practical perspective:

4. How important is research on work and productivity in paid and unpaid work over the life course?

How is the productivity of work affected by an ageing labor force on the level of the economy, on the level of work organization, and on the level of individual qualification and training?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

Considering retirement and early retirement in different countries: What are the effects of different retirement regulations and how should social policy regulate opportunities for work after retirement age?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can public and private employers be motivated by regulations and/or incentives to employ and to adequately integrate and to promote both the youngest and the oldest age groups in the future?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

Considering their different views on welfare policies: How do public, private and voluntary stakeholders in the economy influence policies for the adaptation of the labor market to demographic change?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can we use the productivity of un-paid work by males and females more effectively over the life course while respecting individual needs and principles of gender equality and social justice?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

From your political, organizational or practical perspective:

5. How important is research on education and learning over the life course?

How does education and learning over the life course increase the economic contribution of older people in working life or in productive activities after retirement?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How does education and learning over the life course increase the quality of life of older persons and their non-economic
(i.e. personal, social and cultural) contribution to others?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How does education and learning over the life course enhance the capabilities of older persons and increase the quality and efficiency of welfare and health services?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can self-determination, autonomy, and political participation of older people be influenced by education and learning over the life course?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can education and learning over the life course effectively help to decrease social inequalities, exclusion and discrimination within and between generations?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

From your political, organizational or practical perspective:

6. How important is research on housing, living environment and mobility?

How can changes in the living environment (e.g. housing, infrastructures, ecological quality) and the social environment (e.g. social networks, neighborhood, community) affect the quality of life of all age groups?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How do differences in mobility and access to transportation affect the economic, political, social and cultural opportunities of different age groups?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How is the segregation or spatial concentration of older people in housing, neighborhoods or communities related to social inequalities, discrimination and intergenerational conflicts?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can policies coordinate public provision of housing and private housing markets to ensure that the quantity and quality of dwellings and infrastructure are adapted to the needs of demographic change?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

What are the social and economic challenges and opportunities of combining adaptation of the living environment to an ageing population with adaptation for environmental sustainability?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

From your political, organizational or practical perspective:

7. How important is research on the impact of technologies and social innovations on demographic change?

How can technologies be used to innovate and to optimize the provision of welfare including the organization and delivery of social and health care services?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can education and technology enable the competent use of technologies by older people and support older people in participating in public, social and cultural life?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can new technology enrich the socio-cultural and emotional quality of everyday life over the life course and support social relations between all generations?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How do new technologies (e.g. internet, social networks) affect the development of common values, principles and policies of welfare systems in Europe?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can technologies support new and flexible ways of combining work, education, leisure, family and care over the life course?

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

From your political, organizational or practical perspective:

8. How important is research on the improvement of knowledge, information and information exchange?

How can the exchange of knowledge and experience between sciences, policy makers, practitioners, and interested citizens be organized in ways which enhance principles of welfare and social justice?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can the quality and availability of indicators on demographic change be developed, standardized and organized to support comparative research and evidence-based policies across the EU?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can we improve understanding and modeling of past and future developments over longer periods of time to evaluate the challenges and opportunities of demographic change in Europe?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can comparative research on “good practices” be improved to enable welfare institutions, municipalities and providers to use their own data more effectively and to exchange their experiences?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can the assessment of benefits and costs of information systems and information exchange be improved to guide investments on all levels of the “information society”?

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

From your political, organizational or practical perspective:

9. How important is research on ethics, welfare principles and quality of life?

Concerning the challenges and opportunities of demographic change: What are the attitudes and values of different groups and generations and how are they discussed in public policies and in the media in the EU?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How are the goals of social welfare, social sustainability and quality of life effectively determined, measured and implemented in social policies in different EU member states?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How do different ways (public, private, non-profit) of organizing and financing of social and health care services affect the attainment of goals of social justice, social sustainability and quality of life?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

What is the role of spirituality, religion and religious institutions for personal quality of life and for the adaptation of the welfare state to demographic change?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

How can disagreements and conflicts about social values and ethical principles between groups in society be resolved and which institutions and regulations lead to solutions which are accepted?

This question has... no priority ☐☐☐☐☐ very high priority
Not sufficient expertise to answer ☐

From your perspective: Is there a high priority question or theme **missing**? Please, specify:

1.
2.

10. Social policies involve policy makers, organizations and interest groups on all levels, and these agents have varying degrees of influence on social policy on different levels – EU, national, and regional or local level.

For successful policy strategies it is important to know, if there are influential agents which can be expected to support it.

10.1. Please, select **five** agents on the **level of the EU** who you consider to have most influence on social policy:

Agent	influential?
parliament/elected representatives (e.g. European Parliament, Committee of the Regions)	
administration (e.g. European Commission)	
political parties	
judicial system, law	
public media/TV/press	
political movements/initiatives	
private enterprises – big	
private enterprises – medium + small	
employer associations	
trade unions/employee associations	
professional organizations	
education system	
research institutions	
religious institutions/organizations	
voluntary organizations /NGO/NPO (non-religious)	
socio-cultural + ethnic organizations	
other, specify:	

10.2. Please, select **five** agents on the **national level** who you consider to have most influence:

Agent	influential?
parliament/elected representatives	
administration / ministries	
political parties	
judicial system, law	
public media/TV/press	
political movements/initiatives	
private enterprises – big	
private enterprises – medium + small	
employer associations	
trade unions/employee associations	
professional organizations	
education system	
research institutions	
religious institutions/organizations	
voluntary organizations /NGO/NPO (non-religious)	
socio-cultural + ethnic organizations	
other, specify:	

10.3. Please, select **five** agents on the **regional and local level** who you consider to have most influence:

Agent	influential?
parliament/elected representatives	
administration	
political parties	
judicial system, law	
public media/TV/press	
political movements/initiatives	
private enterprises – big	
private enterprises – medium + small	
employer associations	
trade unions/employee associations	
professional organizations	
education system	
research institutions	
religious institutions/organizations	
voluntary organizations /NGO/NPO (non-religious)	
socio-cultural + ethnic organizations	
other, specify:	

11. Summing up:

How important is the issue of demographic change on welfare and well-being in the EU from your own political, organizational or practical perspective?

This issue has... no priority ☐☐☐☐☐ very high priority

If you had to suggest only one issue:

What is the most important issue for research and policy for understanding and affecting the impact of demographic change?

Please, specify _____

From your perspective,:

what issues do you feel have *higher priority* than the impact of demographic change?

1. _____

2. _____

Thank You

for supporting this survey on the impact of demographic change!

If you have any question concerning this survey,
please, contact the Finnish project partner of JPI-MYBL:
National Institute for Health and Welfare (THL), Helsinki

Richard Pieper

Mira Koivusilta

email: richard.pieper@thl.fi

email: mira.koivusilta@thl.fi

ANNEX 5: References

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