

# THE JPI-MYBL PROCESS

Exploration  
Alignment  
Implementation  
Public Engagement

*Supplement to the  
Strategic Research Agenda*

*The JPI-MYBL Process*  
*Exploration – Alignment –*  
*Implementation – Public Engagement*

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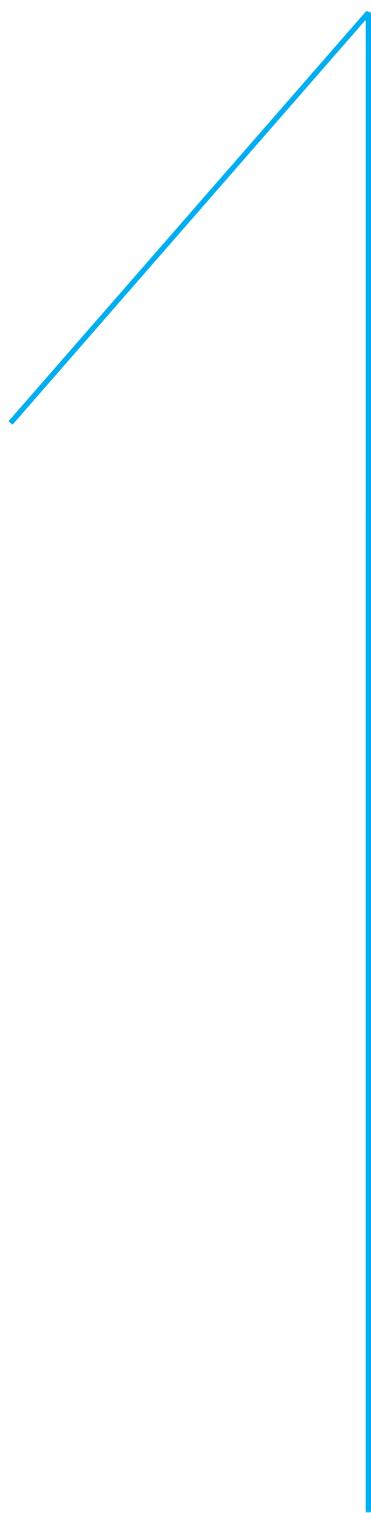
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Supplement to the  
Strategic Research Agenda,  
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# INTRODUCTION

## THE SRA AND THE JOINT PROGRAMMING CYCLE

JPI “More Years Better Lives” (JPI-MYBL) is devoted to research and innovation in the field of demographic change (DC)<sup>1</sup>. The opportunities and challenges of this theme have been discussed and described in the Strategic Research Agenda (SRA); the SRA was presented and launched in Brussels in April 2014<sup>2</sup>. The present supplement aims to complement the perspective on exploration in the SRA by a perspective on alignment, implementation and public engagement placing the SRA in a broader context<sup>3</sup>.

While the SRA is the central document formulating the agenda, it marks also a certain stage in the development of the JPI. At the time of SRA publication many activities were in the planning stage or early in their development and only sketched out in the SRA document<sup>4</sup>. Joint programming in JPI-MYBL was still in the first cycle of research and innovation as described in the “Voluntary Guidelines of Framework Conditions for Joint Programming in Research”<sup>5</sup> leading to the SRA. The focus of the SRA was clearly on exploring the theme of demographic change, delineating a scope of research questions and defining research and innovation priorities. Following the guidelines, this cycle can be depicted in a simplified version as in

Figure 1c “The R&I cycle”. JPI-MYBL had developed a vision, drafted a common strategy, developed an innovative joint programming initiative, is evaluating the ongoing process, and created a Scientific Research Agenda (SRA) raising the initial Vision Paper<sup>6</sup> to a new level and starting the next cycle of alignment, implementation, engagement, and exploration.

In this supplement to the SRA, we will briefly describe the first cycle (section 2) and, then, focus on the next cycle starting with the publication of the SRA (section 3). This supplement, however, will not endeavour to modify the SRA in its content and priorities. This will be left to a later stage based on the experiences with the first R&I cycle guided by the SRA<sup>7</sup>. A short “looking ahead” (section 4) will conclude this report and restate the conclusion of the SRA, namely, our concern and expectation “that research enables more years to mean better lives for all Europe’s citizens.”<sup>8</sup>

Two additional points should clarify the structure given to the supplement: first, although the main topics will be the alignment and implementation of the SRA, the processes forming the cycle cannot be understood as occurring in a strict sequential order. As will become apparent, the processes run to a certain

1. <http://www.jp-demographic.eu/>

2. <http://www.jp-demographic.eu/about/strategic-research-agenda>

3. For similar categories applied to research see JPI FACCE [www.faccejpi.com](http://www.faccejpi.com)

4. SRA, chapter 5

5. p. 24, [http://ec.europa.eu/era/docs/en/voluntary\\_guidelines.pdf](http://ec.europa.eu/era/docs/en/voluntary_guidelines.pdf)

6. <http://www.jp-demographic.eu/about/documents/vision-paper-of-the-jpi-mybl>

7. Upcoming in the J-AGE2 workprogramme

8. SRA, p.9.

extent parallel. For instance, ongoing explorations on the basis of the SRA will already prepare exploration in the next cycle using the experiences of activities of alignment, implementation, and public engagement as a valuable source. In general, later stages will always be anticipated, e.g. alignment of strategies will already take in consideration aspects of implementation and the engagement of partners. The circle can also be applied to the processes themselves, thus, the alignment of alignment strategies will be a task when we create a common alignment strategy on the basis of alignment practices already in place, say, on the national level of Member States. Actually, a first alignment of existing national approaches was one of the basic achievements enabling JPI-MYBL.

This situation will, however, only briefly report on ongoing activities of exploration which aim at the reformulation of research themes and priorities of the SRA. The main objective is a “shift” from exploration to alignment, implementation and public engagement with the SRA as a guiding framework. This will include the clarification of these concepts which are used only in passing in the SRA, thus, enriching the scope of the SRA.

Second, with the shift to alignment and implementation of the SRA, we turn from describing the structure of challenges and societal impacts of demographic change to the processes of intervention by developing research and innovation initiatives. The perspective of societal impacts is shown in Figure 1a, the perspective on the Research & Innovation cycle is depicted in Figure 1c. But the change of perspective does not mean that we leave the conceptual

framework as developed in the SRA. The conceptual framework is only enriched by considering now the policy implications, we are still employing the framework of the SRA with its four domains. The basic approach of JPI-MYBL can be summarised in the statement:

“Demographic change leads to population ageing (causal effect) which produces societal changes (societal impacts) giving rise to policy challenges; these impacts are mediated by the role of technological innovation and environmental changes.”

This statement can be visualized as a Societal Impact Model as in Figure 1a. Slightly modifying the conceptual model in the SRA<sup>9</sup> the four domains of the SRA are now introduced as four domains of the “landscape of society” impacted by an ageing population.

To recall, the underlying dimensions of the “landscape” were, namely:

- › *sustainable welfare vs individual quality of life, health and wellbeing: dimension introducing the multi-level structure of **society** and the perspective on social inclusion and the “common good” vs. the **individual**, his or her “good life” and social cohesion*
- › *governance and institutions vs. economic and social production: dimension introducing **policy** making and services vs. **private** economy including the social production of welfare outside the formal market*

In the perspective of the R&I cycle, these domains find a new order in the joint programming process as indicated in Figure 1b:

- › *the vision of sustainability generates **strategies** and governance models which*
- › *lead to social and technological **innovation** through social and economic production which*
- › *lead to outcomes in Quality of Life, societal impacts, and their **evaluation** which*
- › *are expected to enhance public engagement and enrich the next cycle of R&I.*

The fruitfulness of this approach can be seen when considering its role in different R&I tasks:

- › *In the exploration of research priorities for the SRA, the impacts of DC have been located in the “landscape” identifying key concepts and societal challenges<sup>10</sup>*
- › *In the alignment of the SRA with national programs, we will shift the attention to relevant differences between “landscapes” and acknowledge the diversity in adjusted strategies of national alignment, implementation and public engagement.*
- › *In the alignment with conceptual approaches of other JPIs, the Societal Impact Model can be used as a general framework: instead of the causal effect “population ageing” we can insert issues of “urbanisation” (JPI Urban Europe), “(un)healthy diets” (JPI Healthy*

*Diet), or “cultural heritage risks” (JPI cultural Heritage) and consider the corresponding impacts on society.*

- › *In alignment with R&I technology programs (e.g. AAL) or with JPIs in the natural sciences (e.g. JPI Ocean), the focus will shift to technology & infrastructures or environmental changes, respectively, to inquire into interactions with demographic change and their impacts on society<sup>11</sup>*
- › *Finally, in alignment with H2O2O, the general model also can accommodate the seven Societal Challenges and serve as a starting point for locating JPI-MYBL in the context of these programs.*

Thus, the four domains of the SRA in the context of the Societal Impact Model will provide an underlying structure not only for the exploration of the knowledge base, but also for the processes of alignment, implementation and public engagement. Moreover, the task of alignment of national research programs or other JPIs requires a framework in which to compare the content – the scope of issues – addressed. Frequently national programs as well as Societal Challenges of H2O2O “cut the cake” of problems differently and assign issues relevant to DC to other neighbouring programs. This enriched framework will support not only the identification of societal impacts of demographic change, but also support the tasks of exploiting the SRA in contexts beyond JPI-MYBL<sup>12</sup>.

10. SRA, Figure 4, p. 89

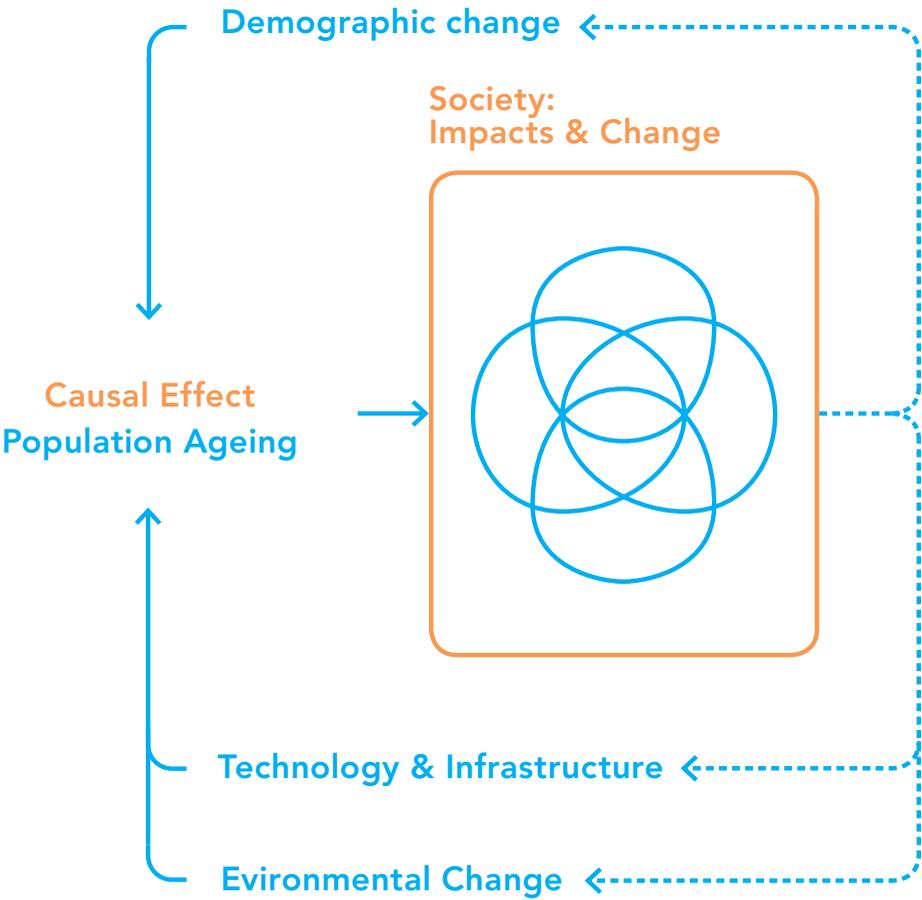
11. Actually, on this general level the model corresponds to the basic POET model of human ecology - people, organization, technology, environment. See Duncan and Schnore 1959; also informing the Millennium Goals of the UN. Duncan, OD (1959). Human Ecology and Population Studies. In Hauser PM, Duncan OD (eds.). The Study of Population. University of Chicago Press. Alcamo J, Bennis, EM (2003). Ecosystems and Human Well-Being: a Report of the Conceptual Framework Working Group of the Millennium Ecosystem Assessment. Island Press, Washington.

12. Challenging Futures of Science in Society: Emerging Trends and cutting-edge issues Report of the MASIS Expert Group setup by the European Commission; The Evaluation Partnership (TEP), Study on Social Impact Assessment as a tool for mainstreaming social inclusion and social protection concerns in public policy in EU Member States, FINAL REPORT, June 2010

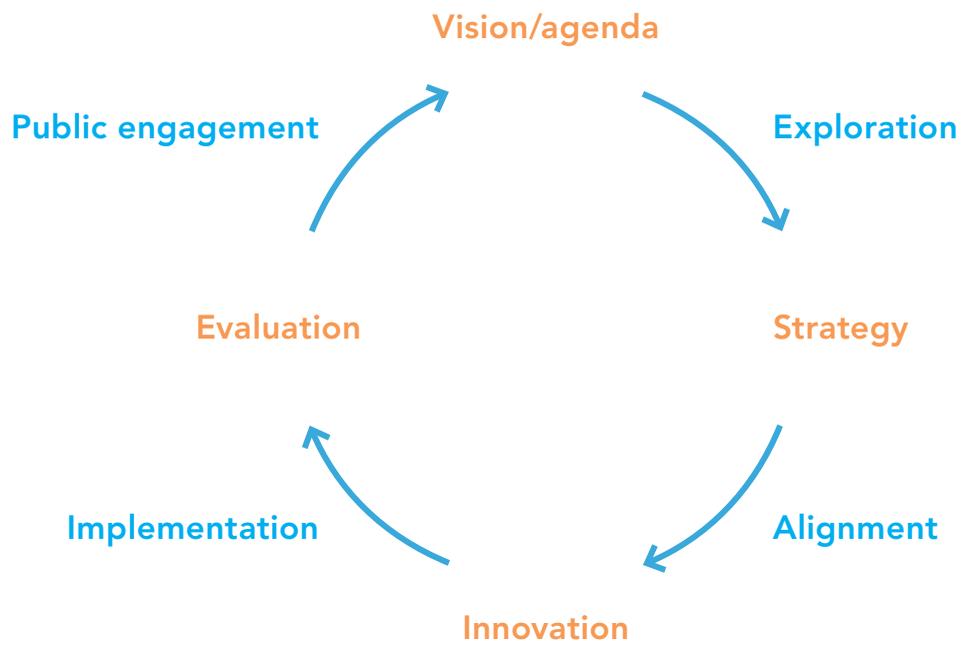
# Conceptual Framework

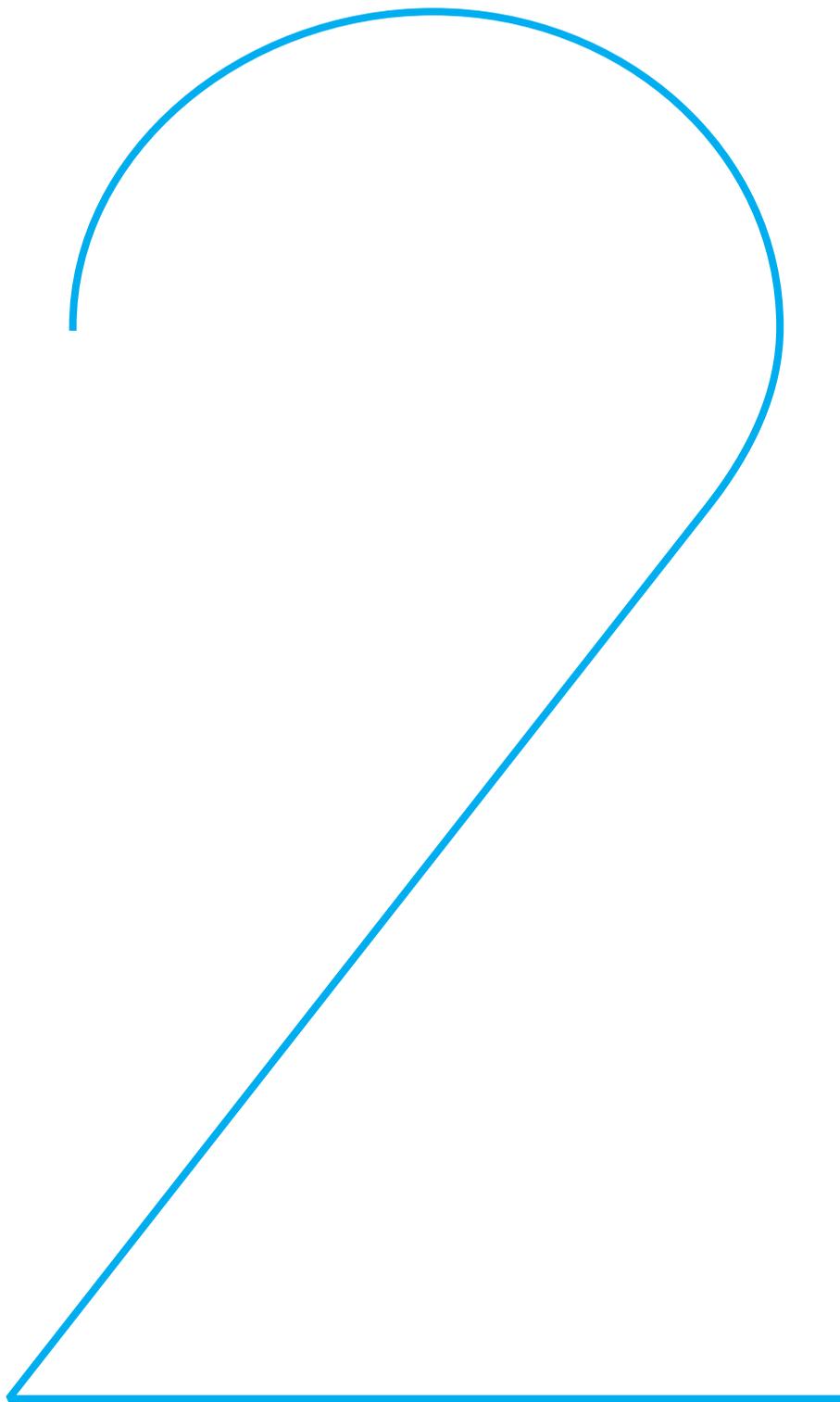
Figure 1a:

*Social Impact  
Model of  
Demographic  
Change*



*Figure 1b:*  
*Research & Innovation Cycle*





# ESTABLISHING THE JPI-MYBL PROCESS

A Joint Programming Initiative (JPI) is a coordination activity between a group of Member States and other countries, which have volunteered to share ideas in order to develop a common research agenda. In the case of JPI “More Years, Better Lives”, nine member states initially agreed to take part. They were joined later by six more countries, including Canada. The representatives of the states formed the General Assembly (GA), responsible for the overall management and decision making of the Initiative.

The participating countries are:

- › *Austria*
- › *Belgium*
- › *Canada*
- › *Denmark*
- › *Finland*
- › *France*
- › *Germany*
- › *Italy*
- › *Netherlands*
- › *Norway*
- › *Poland*
- › *Spain*
- › *Sweden*
- › *Switzerland*
- › *United Kingdom*

In addition Croatia and Turkey take part as observers.

## **Governance Structure of JPI-MYBL**

The governance structure of JPI-MYBL is depicted in Figure 2. The General Assembly (GA) established a Steering Committee (SC) supported by the Secretariat and the two advisory boards. The overall management of the JPI as well as other activities are supported by CSA J-Age, an EC project funded under the EU F7 programme. The structure was adapted to the tasks of alignment and implementation after the launch of the SRA. Especially the SC (former “Troika”) was enlarged (now four members) to make the governance of more diverse objectives and tasks and the representation of member states interests more effective. Moreover, a second CSA J-Age2 project was accepted under H2O2O for the period 2015–2018.

## **Societal Advisory Board (SOAB)**

The SOAB introduces the “societal pull” and advises the GA on all issues concerning societal relevance. It consists of representatives from stakeholder groups at the European level. Currently, 14 organisations and an independent consultant, expert for Eastern Europe interests, are members. The SOAB is aiming to improve its representation of the broad societal issues of DC

13. [www.jp-demographic.eu/about/soab-societal-advisory-board](http://www.jp-demographic.eu/about/soab-societal-advisory-board)

14. Working group reports available at [www.jp-demographic.eu/information/publications](http://www.jp-demographic.eu/information/publications)

15. SRA, p. 36-37

by further memberships. Under the H2O2O framework the SOAB gains in importance as the body representing the public engagement strategy<sup>13</sup>.

## Scientific Advisory Board (SAB)

The SAB represents “scientific excellence” and advises the GA in all issues concerning their scientific relevance. Initially, it comprised the Chairs and Vice chairs of five thematic working groups (see below) together with invited additional experts. After the launch of the SRA, the SAB was re-organised based on nominations by the GA – to make membership independent from changing thematic working groups. In the development of the SRA, the SAB took a leading role by forming an editorial group (including a representative from SOAB) and integrating research reports from five thematic working groups, recommendations from the SOAB, feedback from national consultations, and discussions in the GA representing policy makers and funding organisations of Member States. The SAB represents especially the objective of exploration of knowledge for the JPI-MYBL.

## Thematic Working Groups

To rest the development of the SRA on a broad scientific basis, five scientific working groups have been created. Each country was invited to nominate a scientific expert to serve on each group. Some working groups included members from all participating countries, but in other cases some countries chose not to nominate. The five groups were:

- › *Health and performance*
- › *Social systems and welfare*
- › *Work and productivity*
- › *Education and learning*
- › *Housing, urban and rural development.*

The working groups met to review the previous work by other agencies and the issues raised by demographic change in their field. Each group produced a report, which was summarised by the working group’s chair before being discussed by the Scientific Advisory Board, and the Societal Advisory Board<sup>14</sup>.

With the SRA, the themes were re-organised in a conceptual framework focusing on four domains:

- › *Sustainable welfare*
- › *Governance*
- › *Economic and social production*
- › *Quality of life, health and education.*

The domains are embedded in the underlying (vertical) dimension of levels from individual to society and the (horizontal) dimension of public to private spheres. The opportunities and challenges of demographic change are mediated by technological and environmental change<sup>15</sup>.

The five thematic working groups were dissolved in favour of a more flexible strategy of forming thematic working groups from a network of scientific experts (including former working group members) corresponding to the knowledge needs of joint activities such as joint calls for research & innovation projects.

## Research Policy Group

The Research Policy Group (RPG) was launched in 2013 to assist in the alignment of national research and funding policies, a major objective of JPI-MYBL. The overall aim of this group is to strengthen the political impact of the initiative and to support the goal of alignment. In addition to the efforts taken at Member State level, the JPI MYBL intends to have an impact also at the EU level, in particular with regard to the design of the Framework Programme for Research and Innovation – Horizon 2020. For this reason, the RPG has established a wide network of representatives from national ministries and funding agencies, the European Commission and H2020 Programme Committees and is linked to stakeholders in the area of demographic change (as e.g. the AAL JP, the EIP-AHA, the EIT KIC on Active and Healthy Ageing, JPI-HDHL, ESFRI and others). The RPG also organizes workshops which are dedicated to specific topics related to European Research Policy and is mandated by the GA to prepare position and input papers for the European Commission on behalf of the JPI.

## CSA J-Age1 and J-Age2

As stated above, the objectives of JPI-MYBL are supported by the CSA J-Age1 and J-Age2 (see Figures 2 and 3). In J-AGE2, starting in March 2015, the secretariat function for the GA has been moved to the CSA funding and the project also has management functions for joint activities. J-AGE workpackages are responsible for the support of activities of exploration, alignment, implementation and public engagement/dissemination, and the evaluation of internal processes and external impacts of JPI-MYBL. CSA J-Age enhances especially the implementation of GA initiatives.

## Developing the Scientific Research Agenda

As indicated already, the production of the SRA constitutes the first R&I cycle. The SRA was developed on the basis of the Vision Paper<sup>16</sup> from the working group reports through an iterative process of discussion and feedback involving the Scientific Advisory Board, the Societal Advisory Board, national consultations, and the General Assembly<sup>17</sup>. In autumn 2013, a draft version was circulated to members of all the Boards, and to the Member States for comment, and these comments were considered by a joint meeting of the Scientific and Societal Advisory Boards in November. The draft was then revised and approved by the General Assembly in January 2014. The process is depicted in its wider context in Figure 3.

16. <http://www.jp-demographic.eu/about/documents/vision-paper-of-the-jpi-mybl>

17. see SRA, Figure 3, p.72-73

The Agenda is not a conventional “research programme” to which researchers can bid for funds. Rather, the intention is that it will help to shape the funding priorities of national and European agencies, including the partners who served on the JPI General Assembly.

The agenda may be carried forward in a variety of ways including joint activities such as:

- › *European research calls*
- › *Transnational expert networks*
- › *Training and mobility programmes for researchers*
- › *Collaborative funding between member states or their research funding bodies*
- › *Programmes organised by individual countries alone.*

The JPI Data Project outlined in Annex 2 of the SRA demonstrates one way in which such transnational collaboration can be effective. The project can be understood as a joint project in exploration leading to the implementation of an accessible data base complementing the SRA in the field of data on demographic change<sup>18</sup>. It is planned to develop this project further toward the alignment of European data bases on demographic change in Europe.

The four major objectives of JPI-MYBL are the **exploration** of the opportunities and challenges of DC and the identification of priorities for R&I, the **alignment** of national programs and their alignment with ERA programs, the **implementation** in joint activities and research infrastructures, and the promotion of **public engagement** in the spirit of SWAFS. With the SRA approved by Member States and published, the next cycle is shifting

the focus on alignment, implementation and public engagement. In Figure 2, the cycle is depicted with partners and actions involved in each objective. As stated above, the activities are – at least partially – running parallel and influence each other. Therefore, the cycle is here shown as an interactive ring supported by the GA and CSA J-Age at the center.

In the following section, the focus will be on the activities and achievements as well as the plans and next steps under each objective.

*Figure 2:*

*The Structure of JPI-MYBL and the CSA J-Age supporting project*

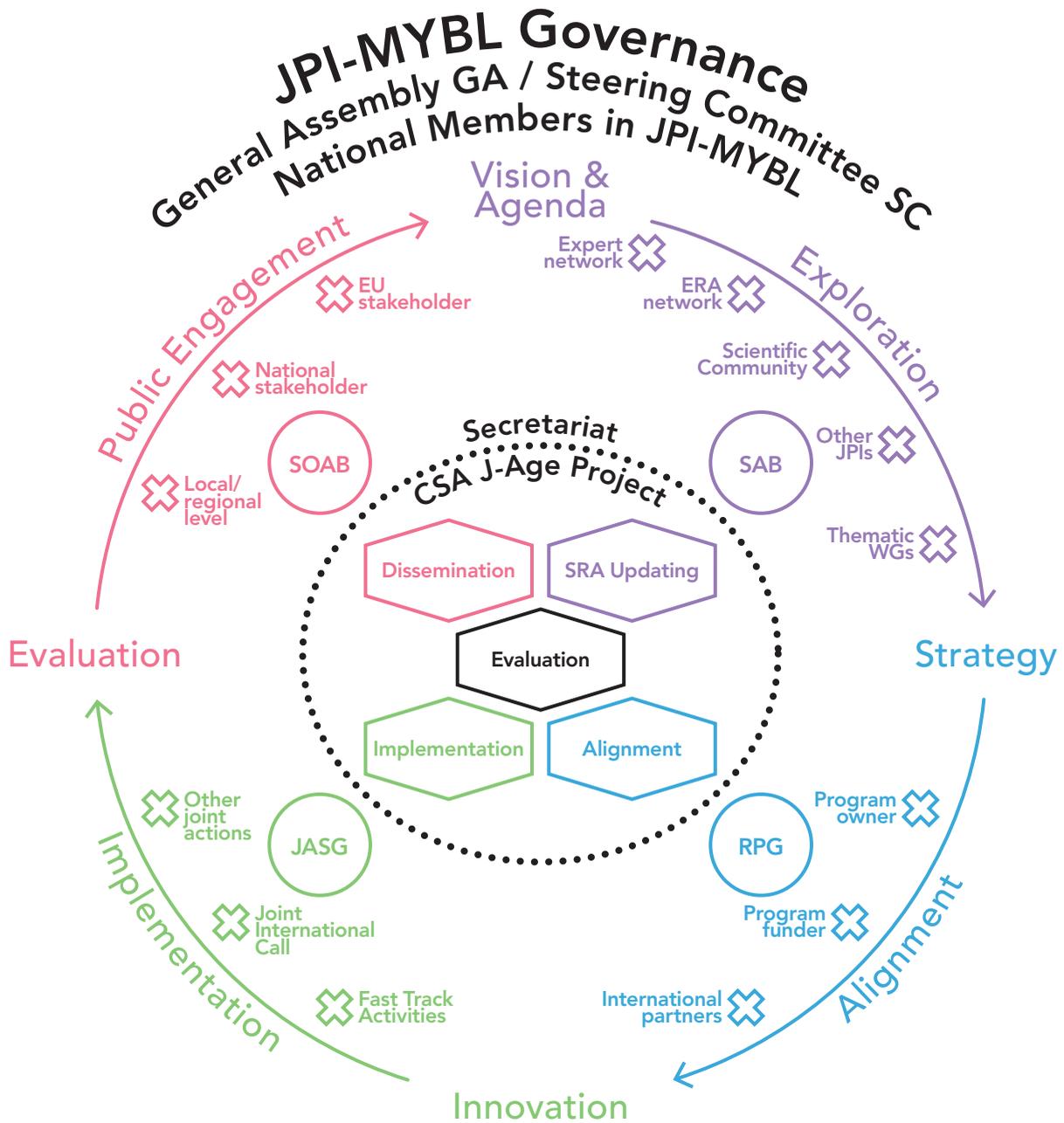
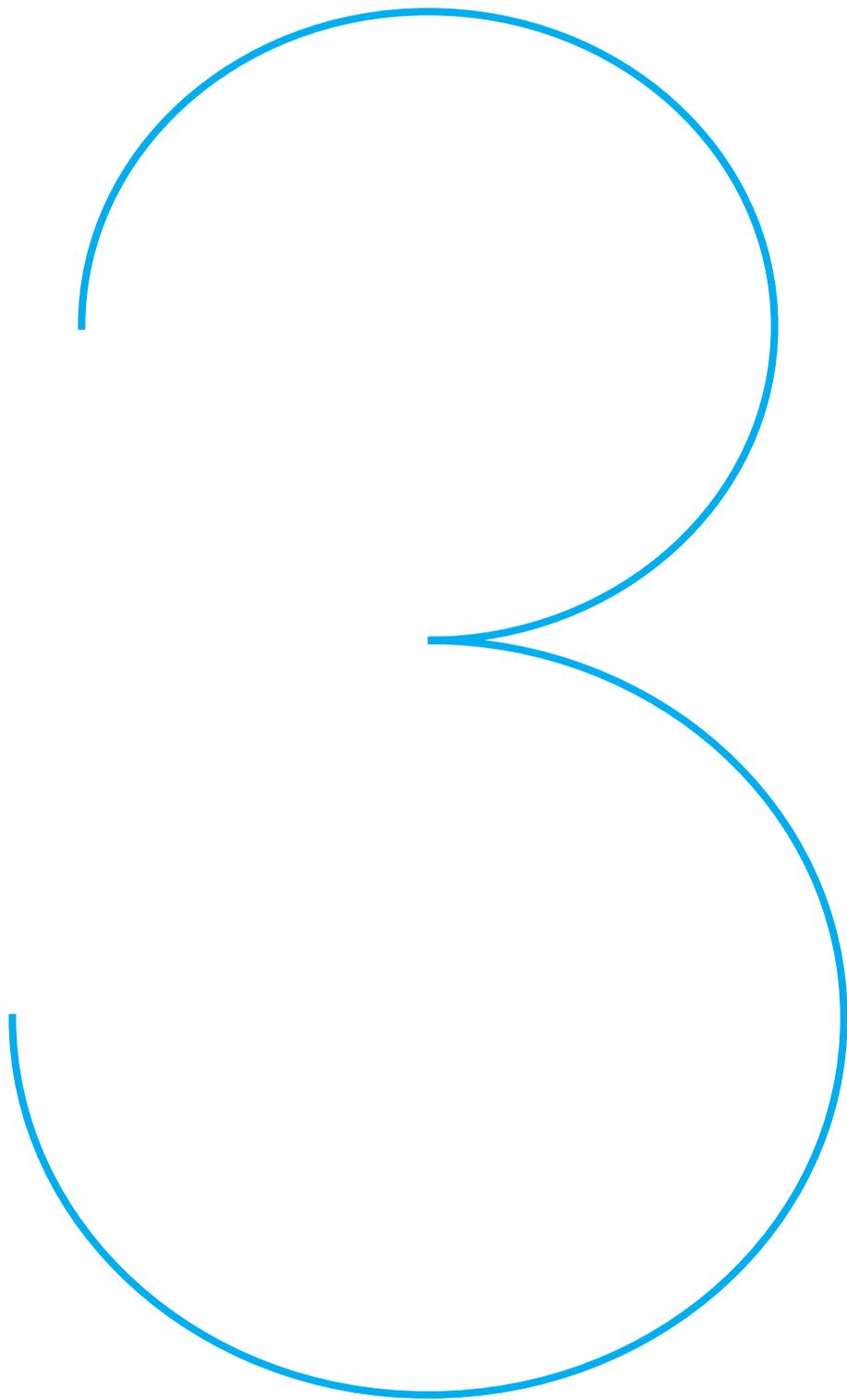


Figure 2:  
The Structure of JPI-MYBL  
and the CSA J-Age  
supporting project.

-  Working Groups
-  Steering Groups
-  Projects & partners

- ERA = European Research Area
- JASG = Joint Action Steering Groups
- JPI = Joint Programming Initiative
- MYBL = "More Years, Better Lives"
- RPG = Research Policy Group
- SAB = Scientific Advisory Board
- SOAB = Societal Advisory Board
- SRA = Strategic Research Agenda
- WGs = Working Groups



# THE JPI-MYBL PROCESS: EXPLORATION – ALIGNMENT – IMPLEMENTATION – PUBLIC ENGAGEMENT

As indicated, a variety of activities have been initiated to realize the four objectives. The SRA is the prominent product of the first cycle. Figure 3 is giving an overview of the activities following and including the description of the JPI-process in the SRA<sup>19</sup> and placing the SRA development in the overall context. The four objectives appear here as parallel streams.

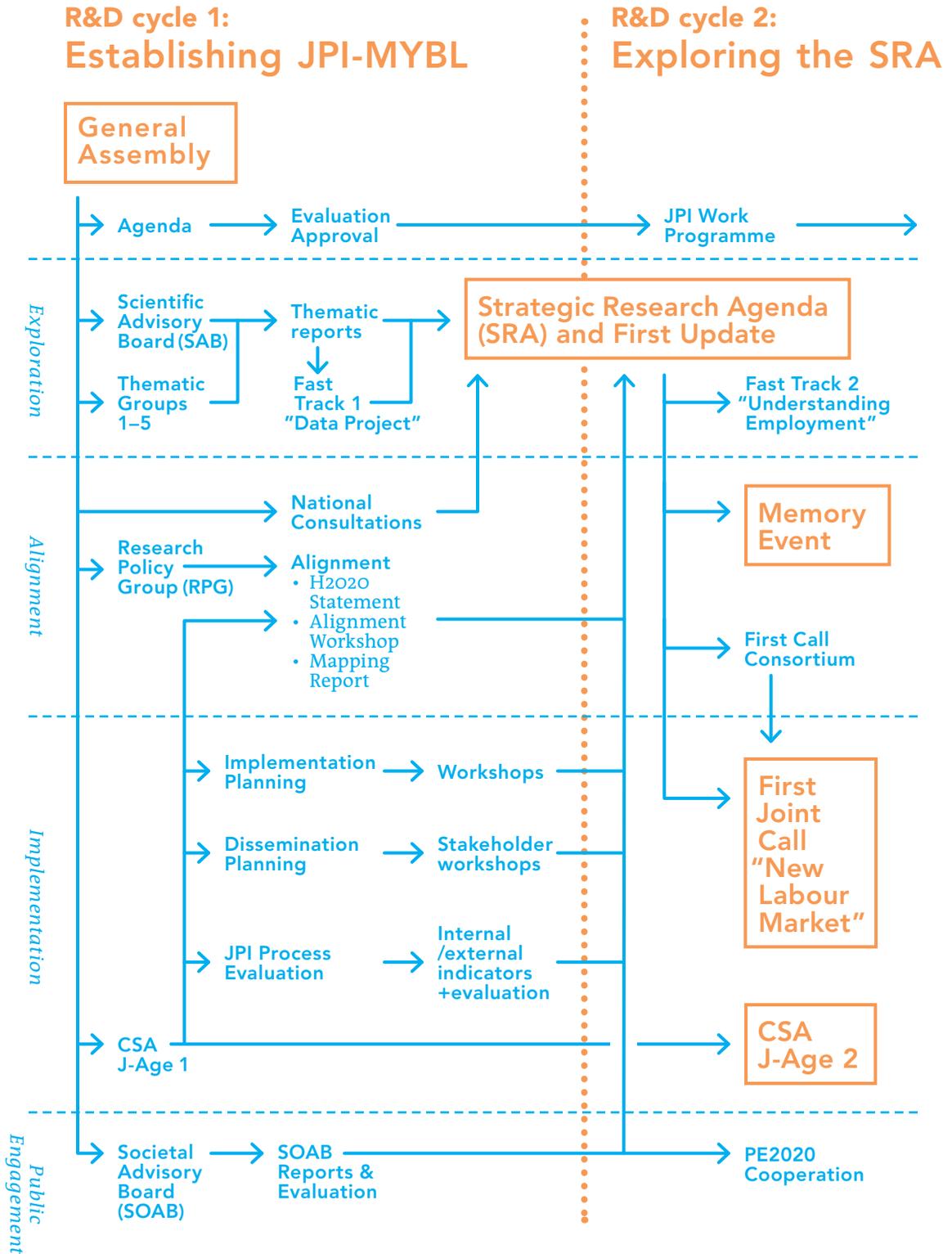
The R&I cycle structuring this is shown in Figure 2.

The objective of **exploration** is described on the left side with a focus on SAB and its connection to the scientific community. **Public engagement** is the focus of SOAB and its network of stakeholders on all levels. Their role may be characterized by the initiative “Science with and for Society” in H2O2O: SAB and its expert network mediate especially the input of “science for society”; SOAB and its networks introduce the “societal pull” and promote a “science with society”. Both objectives should be met in each joint activity.

The objective of **alignment** is placed on the right side. JPI-MYBL strives to facilitate the co-ordination and adjustment of national research and innovation efforts, as described above. Policy makers, research funders and society are the addressees of JPI-MYBL output with Member States being the immediate beneficiaries; the Research Policy Group (RPG) has a special mediating and networking role. At the bottom, the sketched of **implementation** of the SRA is sketched out as consisting of joint activities involving specific partners, e.g. research institutions funded and monitored under a call or national partners promoting the cause of DC in Member States.

19. See SRA Figure 3, p. 72-73

Figure 3: The JPI-MYBL Process:  
Exploration – Alignment – Implementation – Public Engagement



## 3.1 EXPLORATION

### What is exploration?

The task of exploration keeps a focus on the development of new knowledge and insights arising in the scientific community and in the course of JPI-MYBL activities. Alignment is concerned primarily with the relationships between approaches and programs (e.g. compatibility, overlap); implementation (in a narrower sense) is mainly oriented toward utilizing knowledge in practical policies and intervention; public engagement addresses the commitment and partnerships, including all stakeholders, since projects need to “fit” into the societal context. The distinction is not so rigid in practice, because each project will combine all four elements to some extent.

The SRA is the central document summarizing the exploration of the opportunities and challenges of DC. However, it is not the end of exploration objectives and tasks in JPI-MYBL. Research on demographic change has progressed already since the launch of the SRA, and more generally, the SRA has to keep track of contributions to our knowledge – both scientific and based on social policies and social innovations on all levels. This includes experiences from joint initiatives as well as reflections on our conceptual approach in view of new policies e.g. under the research programs of H2020 or national research programs.

### Activities and achievements

There are, however, new developments which have been evaluated and are already informing ongoing activities; they will be integrated in the further process of exploration. Notable examples are the EU research project MoPAct “Mobilising the Potential of Active Ageing in Europe”<sup>20</sup> which has been exploited, for instance, in the Fast Track “Understanding Employment Participation” (see below). Another important source which has been included in JPI-MYBL responses to H2020 is the report of 8 European Academies on demographic change<sup>21</sup>.

On a conceptual level the relationships between the SRA framework and the frameworks of other JPIs have been explored, especially of JPI Urban Europe, JPI Cultural Heritage and JPI Healthy Diet. Their frameworks include issues of DC, but in different perspective. The interface to JPI-MYBL has to be clarified to promote the aim of avoiding duplication of research efforts also between JPIs. As indicated in the introduction, the enriched framework of JPI-MYBL should support this objective.

In view of the approach of the SRA, at least three themes are emerging from discussion and feedback in JPI-MYBL. The development of these themes is observed in the scientific literature, and

20. [www.mopact.group.shef.ac.uk](http://www.mopact.group.shef.ac.uk)

21. “Mastering Change in Europe”, 2014, [www.leopoldina.org/en/international-issues/international-statements](http://www.leopoldina.org/en/international-issues/international-statements)

22. see SRA, Annex 2

23. [www.jpi-dataproject.eu](http://www.jpi-dataproject.eu)

they might be strengthened in a next version of the SRA and considered in joint actions:

### **The impact of current crises**

The ongoing financial crisis, the impact of climate change, and international political crises influencing e.g. safety through terrorism, migration patterns, and integration problems are affecting also DC (e.g. through migration) as well as policy responses (e.g. by competing for political attention and resources).

The choice of “New Labour Market” as the theme for the first joint call (see below) may be understood as a response of JPI-MYBL to the urgent challenges created by an on-going financial crisis in EU member states.

### **Quality of Life**

Although Quality of Life features already as a central domain in the SRA, JPI-MYBL argues that in the context of H2020 and the Societal Challenges 1 and 6, the support for research in this domain should be strengthened. This concern has been expressed, for instance, in JPI-MYBL statements giving feedback to the EC on H2020. While research on the relevance of health for wellbeing is strongly addressed especially in SC 1, the role of ageing, a life course perspective, social relations, work environments, political engagement, cultural traditions, and the methodological and conceptual issues of a richer Quality of Life approach need more attention.

### **Social and technological innovation**

Again, these themes are included among the research priorities of the SRA. Still, it is felt that these themes should be further developed in view of rapidly

changing technologies and the need for re-designing our living environments (“smart cities”), public services and care systems to adapt to changing age structures and migration patterns. One way of pursuing this aim is seen in elaborating the cooperation with other JPIs, notably AAL and JPI Urban Europe and stronger engagement in relevant Action Clusters in the EIP on Smart Cities and Communities and also other relevant EU initiatives such as the Design Driven Innovation Action Plan. Here first contacts have been made to explore the approaches of other ERA partners.

The SRA has identified gaps in existing knowledge; therefore, research expanding and enriching the knowledge base is crucial. One strategy to close gaps is to develop Fast Track projects, especially to generate the necessary knowledgebase for joint activities. One project – the Fast Track Data Project – has already been described in the SRA<sup>22</sup>; the project produced a map of data sources related to demographic change in 12 Member States accessible and searchable on an open access European website<sup>23</sup>.

A second Fast Track “Understanding Employment Participation” (UEP) was initiated to inquire into the available knowledge on the determinants of employment of older persons (50+ years), specifically determinants of retirement before the formal retirement age. Most European countries aim for longer working lives encouraged or enforced through legislation and social policies, clearly to ease the burden on pensions systems, but also to open up new opportunities for employment and social participation in old age. The Fast

Track had the role to inform Member States and their research programs and policies on this issue, thus supporting alignment. At the same time, it had the task to enrich the knowledge base for the specification of the first joint call. The results of this joint action were incorporated in the formulation of the call text. We will return to this Fast Track in the section on implementation below. For a more detailed description of the Fast Track, we refer to the JPI-MYBL website<sup>24</sup>.

### Plans and next steps

Plans and next steps are part of the JPI Work Programme. Some points arising in the discussion of the SRA are briefly addressed in the following:

The integration of new knowledge and priorities into the SRA will be supported by a knowledge management approach. The use of concept mapping as a method to compare the content of different research agendas and national programs will be explored.

The conceptual framework of the SRA will be discussed with other JPIs to align the approaches; contact has been established with MoPAct to include their rich conceptual framework; contact with other JPIs have been established at the Memory Event in Rome. As a special task it will be explored to what extent the approach and methodology of Societal Impact Assessment<sup>25</sup> can be exploited to align JPI frameworks and strategies.

The scope of the SRA can be widened and enriched in each domain:

- › *Sustainable welfare – European Member States are in different stages of DC and on different paths of development of their “welfare regime”; MoPAct has proposed an interesting framework to capture these differences.*
- › *Quality of Life – as described in the statement to the EC on Societal Challenge 1, there is a need for further development of life course oriented QoL models; here the cooperation with other research programs has to be promoted (e.g. EC-Silc, AAI, MoPAct, SC1).*
- › *Governance – the multi-level and stakeholder approach should be elaborated to identify agents for DC policies and interventions especially on the regional/local level complementing the focus on the EU and national level.*
- › *Social and economic production – here the experiences with the First Call “New Labor Market” have to be integrated into the SRA.*

24. [www.jp-demographic.eu/about/fast-track-projects/understanding-employment](http://www.jp-demographic.eu/about/fast-track-projects/understanding-employment)

25. Challenging Futures of Science in Society: Emerging Trends and cutting-edge issues Report of the MASIS Expert Group setup by the European Commission; The Evaluation Partnership (TEP), Study on Social Impact Assessment as a tool for mainstreaming social inclusion and social protection concerns in public policy in EU Member States, FINAL REPORT, June 2010

## 3.2. ALIGNMENT

26. <http://www.neurodegenerationresearch.eu/wp-content/uploads/2014/12/GPC-Alignment-Report.doc>

### What is Alignment?

Alignment in JPI involves a complex organizational process on many levels – European, national, regional, local – and scientific as well as non-scientific stakeholders. It is a “crucial element in the Joint Programming Process”, as stated in the report of the GPC Working Group Alignment for the EC<sup>26</sup>. The GPC report summarizes the experiences of a broad scope of research programs including JPIs, and is an informative starting point. But the GPC report has to admit that the interpretation and practice of alignment is still an open question.

A general definition might help to guide the understanding (adapted from the GPC report):

*Alignment (in the context of joint programming) is the strategy of mutual adjustment of research programs and activities over the full policy cycle with a view to improve the quality and efficiency of research and innovation at the level of EU Member States and ERA.*

*Quality criteria have to include scientific excellence, efficacy of research processes, efficiency of resource utilization, and the level of public engagement.*

While quality criteria are often neglected, alignment has a focus on strategies, procedures and funding comparing and adjusting programs and practices on the same level e.g. national research programs. The “alignment of alignment strategies” – the main focus of the GPC report – makes good sense, in as much as JPI partners are indeed rather similar partners (e.g. ministries and funders). In cases where the organizational structures and/or the R&D traditions are quite different, it is not so obvious anymore whether similar strategies bring the same results. The GPC report acknowledges this in recognizing that JPI partners have to be respected in doing alignments with regard to their specific conditions and needs.

In aligning national programs we should also recognize that national programs “cut the cake” of challenges differently. Alignment has to look at a range of programs containing themes relevant to a SRA.

The concepts and strategies of alignment have been discussed in several JPI meetings and workshops, e.g. in a RPG workshop, meetings of the WG on SRA Updating and in the Workshop on Implementation. The results of these meetings will feed into a more elaborate discussion of the concept of alignment. The paper will be submitted for discussion in the GA and CSA J-Age2.

## Activities and achievements

### Conceptual work on Alignment

The GPC report makes a distinction between the alignment of content and the alignment of activities and instruments to achieve alignment, i.e. between the question “do programs address the same things?”, and the questions “what should we do to achieve (more) communality?”, “what instruments can be used in the process?”, “how can we align the strategies of alignment of Member States?”, and “how can we motivate partners to commit to common procedures?”.

In the GPC report, the alignment refers especially to the adjustment of national research programs to the SRA. We suggest to distinguish the strategy (WHY and WHAT), strategy (HOW), innovation instruments (WITH WHAT), and evaluation (WHO) in alignment processes following the R & I cycle of our basic framework (see Figure 1):

### Why and what

On the alignment of content the GPC report remains practically silent. With the decision on JPI domains, supported by mapping of national programs, and agreement on the SRAs, this aspect seems to be considered practically solved. The focus is on methods like Knowledge Hubs and Thematic Groups which develop an integrated knowledge base.

Alignment serves to identify similarities, to avoid overlap, and to detect gaps in programs in order to streamline the common effort for effectiveness, efficiency and acceptance. Unfortunately, these goals do not necessarily

harmonize. Going for efficiency and avoiding overlap might keep us from detecting gaps and emerging issues, especially, when none of the considered programs does already contain the missing theme. Detection of emerging themes and foresight are not always efficient, but creative – that is why science explores even themes not (yet) recognized as important by policy makers and existing programs.

Alignment is working with texts or descriptions, although it aims to change practices. When we compare e.g. the SRA with a national research program we want to evaluate the contents: Especially, when different “languages” (e.g. scientific or professional disciplines) and interpretations of problems are involved, this is not an easy task (to say the least!). One problem is, for instance, that the formulation of problems changes with the level (e.g. EU, national, regional) and along the policy cycle. From the content, we might also have to draw conclusions about the **WHY**, **HOW**, **WITH WHAT**, and **WHO** of alignment. Domains in the natural sciences and engineering might well need different procedures than in the humanities.

Or to put it differently: Alignment as described in the GPC report is not really dealing with the quality of content or knowledge; it is only concerned with the procedures to streamline contents for implementation.

## How

On the alignment of activities the report has a clear focus. This can be seen also from the attached list of “good practices”.<sup>27</sup> There is quite a scope of strategies and structures available in JPI practices, however, they still need to be further developed and evaluated.

There is a wide scope of activities and instruments currently used in JPIs (see the attached list). The GPC report is right in recommending to exploit the experience of other JPIs by systematic evaluation and to suggest a concerted effort by the EC to support research & development specifically on alignment. Mapping, foresight, development of conceptual frameworks, and prioritization are examples of tasks which are accomplished quite differently in JPIs.

## With what

On the alignment of instruments the report contains very little.

The methodologies are largely considered to be still developed. Here we would also like to distinguish between methods to establish degrees of similarity in contents (e.g. mapping) and methods to compare and adjust alignment activities and procedures (e.g. evaluation of effectiveness, efficiency, and acceptance in a diversity of Member States).

Ensuring the sustainable financing of R&I is a central concern in alignment, e.g. to avoid duplication and overlap of efforts. As the inquiry into the funding models for joint activities demonstrated, there is a great diversity of models and a need to find solutions suitable for cooperation in a “variable geometry” of Member States.

## Who

On the alignment of public engagement the GPC report is again silent.

Here the experiences of other JPIs as presented in the WS on Implementation (by JPND and JPI HD) clearly recognize the importance of measures fostering commitment and partnership.

The GPC report is explicit on Member States, JPIs, the EC, research institutions and researchers (and the GPC itself) as stakeholders in alignment. Not so clear is the role of citizens, stakeholder advisory boards, and civil society organisations in public engagement. “Ultimately”, they are key stakeholders as well. But their function in alignment is not really considered when suggestions become more concrete – note: their absence in the “good practices” list. The role of industry, private enterprises, and technology is also unspecified. In programs involving Technologies and Public-Private-People-Partnerships it is anything but obvious that “science” and “policy makers” are the **WHO** with the best knowledge, let alone with the best practices for implementation. Actually, many suggestions in the GPC report could be interpreted to favour more centralized even bureaucratic structures to make streamlining the implementation of SRAs more efficient. A related problem is the implicit assumption that all Member States have equally developed (hierarchical) research infrastructures which define naturally the JPI partner organisations, e.g. ministries and funders. The experience of JPIs is, however, that they have to be very flexible in engaging strong non-public partners (e.g. big industry) in developed countries and competent non-public partners in less developed Member States (e.g. research

institutions Eastern EU members). These differences also impact on alignment strategies. To put it differently: The GPC report does not (yet) breathe the spirit of “Science with and for Society” (SWAFS) and “Responsible Research and Innovation” (RRI)<sup>28</sup>.

### Expected challenges

Alignment, moreover, has to mediate between the interests of different partners. These interests will motivate the participation in JPI; they will do it, however, in different ways and depending on the societal challenge at hand<sup>29</sup>:

- › *In some cases, the challenge will meet a rather common scope of interests which lend themselves to the definition of a common thematic joint program with benefits for each partner and typically with added value which can be realized only by a common effort.*
- › *In other cases, the interests or conditions for participation may differ, but they might be coordinated in a “smart specification” or division of labour. Especially, partners with rather limited resources will seek the advantages of cooperation with others to be able to specialize on own competencies.*
- › *Pooling of resources may also be an incentive for JPI partners quite independent from specific research questions addressed. Sharing infrastructures, data sources, research capacities and experiences with practical solutions will be an advantage which may*

*pay-off not only by enlarging general capacity, but by opening quite unexpected opportunities.*

- › *Finally, JPIs provide an arena for developing practices of cooperation in “variable geometries”. In fact, Joint Programming can be understood as a general strategy to shift the perspective from the “top-down” implementation of “scientific solutions for all” to a “bottom-up” process of finding solutions among partners with common or compatible interests which essentially develop and exploit their capacity for learning and cooperation. Cooperation practices are often driven by triple-helix formations in regions where regional governance, industry and research align their strategies building on and developing competitive advantage. The triple-helix is now being extended to the quadruple helix which includes civic society.*

These different contexts will have consequences for the way alignment will be approached shifting the focus from consensus on content to specializations or to meaningful pooling of resources or to cooperation and networking – again following our basic conceptual framework.

A critical note may be made in reference to the GPC report on alignment. Alignment is unequivocally “good” in the GPC report; there is no discussion under which conditions or which alignment (or suggested ways of alignment) is “bad”. Experiences of other JPIs, however, suggest that barriers to alignment may also indicate that diversity has to be considered in its own value. These issues will be faced in alignment of national programs with path dependent priorities, as recognized in the GPC report. It is also not obvious,

28. See Rome Declaration on Responsible Research and Innovation [http://ec.europa.eu/research/swafs/pdf/rome\\_declaration\\_RRI\\_final\\_21\\_November.pdf](http://ec.europa.eu/research/swafs/pdf/rome_declaration_RRI_final_21_November.pdf)

29. See also GPC report 2014 <http://www.neurodegenerationresearch.eu/wp-content/uploads/2014/12/GPC-Alignment-Report.doc>

30. JPI ToCoWork, final conference 2014 <http://www.jpis2cowork.eu/index.php/meetings/45-final-conference-madrid>

how alignment involving, for instance, the creation of hierarchical infrastructures (see report) and standardized procedures can be fruitfully applied in the context of exploration. Small and chaotic is sometimes beautiful and effective. The advantages and disadvantages of highly organized research infrastructures are still debated as is the role of Big Industry versus SMEs in applied research. The alignment in science runs to a large extent through the channel of open and public communication within the scientific community; its coordination is achieved by content and methodological standards rather than by streamlined procedures.

### **Mapping national research programs**

A starting point for aligning and improving the coordination of national programmes, is a mapping exercise reviewing the scale and scope of funding activity in demographic research among JPI MYBL member countries, as emphasized also by JPI-ToCoWork<sup>30</sup>. Mapping can be considered a central method for exploration; it is included here, because it also connects to alignment and implementation.

The mapping exercise has been conducted in preparation of the SRA and provided valuable input. The primary aim was to give an objective view of the scale and scope of funding activity in demographic research among JPI member countries. This information is used to identify gaps and opportunities in research funding in comparison to medium- to long-term research needs, objectives and priorities.

In a multi-stage survey of program owners in J-Age I and the JPI MYBL General Assembly, country-specific information about national research

funding programs and agencies was acquired. Missing data was minimized by desktop research. The data was database and recorded in an online database open for public access, which can be accessed at: <http://www.jp-demographic.eu/information/profiles>

The results demonstrated that there are many multi-purpose or umbrella funding programmes with some relevance to demographic change, and some explicitly include the impact of demography among other issues. However, few if any of these examine the specific impact of demography on the domains highlighted in this agenda. As a result it is impossible to estimate how much money might be currently committed to demographic issues. In many cases, work is confined to specific scientific disciplines, and does not adopt the broader interdisciplinary approach proposed in the SRA.

Some funding is available for all important areas of demographic change, but the review also shows that some areas (like health), receive more funding than others (like education and learning). The level and approach to funding also varies across countries. While, in some countries (like Austria, Finland, Switzerland), most funding is channelled through research institutions and universities, others rely more on competitive funding (like Belgium and the United Kingdom), whereas a third group (including Germany and the Netherlands), offer a mixture of approaches.

Consequently, problems for alignment arise not only on the level of identifying relevant programs, but also on the level of administrative procedures and funding.

### **The Research Policy Group (RPG)**

Concerning alignment on EU level, the RPG formulates JPI position papers in order to provide input for the preparation of the strategic programme and work programmes of Horizon 2020. The focus has been on the alignment of program contents as described above. As demographic change (DC) is addressed within H 2020 by Societal Challenges 1, 6 and under the ICT action line of the Industrial Leadership pillar, the RPG collects high-quality advice from the SAB and SOAB to the corresponding parts of H2020. The JPI MYBL is a MS-driven activity which intends to complement and act synergistically with other ERA initiatives in the area of Active Ageing and Healthy Living. It is therefore mandatory to identify overlapping thematic domains of the SRA with other programmes in order to optimize an efficient use of financial resources (national and EU) and to prevent a double-funding of work and seek synergies between different funding streams. At the same time an intensive exchange of information will facilitate a division of labour between key actors active in the corresponding fields of research. As stated in the GPC report (see above), different strategies are possible and need to be explored.

Joint activities run by the JPI MYBL should predominantly focus on projects which cannot be conducted adequately by a single country as it is for instance the case for comparative studies. In contrast, national funding has to be adapted to country specific challenges and conditions. Consequently, the process of alignment on national level will contribute to a better coordination of national / transnational funding with an added value for national funding

institutions. In contrast to H 2020, the Joint Programming approach ensures for a high degree of flexibility due to the underlying principles of variable geometry and voluntariness. This creates, in turn, affordances of flexibility for European research infrastructures. The opportunities for alignment on the level of research infrastructures were discussed in a first RPG workshop and will be pursued further.

The ultimate goal of alignment activities is the implementation of the SRA. As the topic demographic change covered by the JPI MYBL is very broad, there are several other European initiatives that show certain overlap with the SRA of JPI MYBL. There is an ongoing need for exchange and coordination with these other initiatives. As demographic change is not limited to Europe we will build on the participation of Canada in the JPI and develop relationships with additional partners.

## **Plans and next steps**

Plans and next steps are, as stated above, part of the JPI Work Programme. Some points arising in the discussion of the SRA are briefly addressed in the following:

The RPG is planning to consolidate and extend the close collaboration and relationships especially in the field of policy networking and alignment in the European Research Infrastructure Area and to foster international networking with third countries, primarily the USA and Latin America, China, Korea and Japan, in order to encourage their participation in JPI MYBL as full partners and make this JPI a truly worldwide research effort in this area. But it is also foreseen to network especially with Eastern European Member States, which starts with the planned scientific conference on Demographic Change in Central and Eastern Europe (CEE) in March 2015 in Vienna.

The mapping of DC research will be continued and enriched as a tool for alignment of national research programs, as a tool for connecting the conceptual framework with the data project, and as source for research and policy making.

An intensive exchange on alignment experiences will be established building on existing co-operations especially with other JPIs.

The alignment of national research programs will be a central objective for alignment. Especially in Member States which do not have a developed infrastructure on the level of ministries, alignment will address research programs of leading research institutes (institutional alignment).

## 3.3 IMPLEMENTATION

### **What is implementation?**

Implementation has a focus on aligning and designing activities further along the policy cycle – on the way from research to policy to production to markets. Alignment of national programs with the SRA with a “top-down” approach makes perfect sense, but we have experienced that learning and new insights have to be incorporated at each stage of implementation. Implementation has to be conceived as both productive and innovative, not only as a selection of cost-efficient instruments. The SRA is itself subject to a learning process with cycles of revision which include a “bottom-up” process of adjustment to problems of implementation and the engagement of partners and stakeholders. Alignment has to adjust the content of the SRA, adopt adequate procedures, and generate the commitment of all stakeholders. This is also one of the main arguments behind the idea of “Science with and for Society”.

While alignment of the SRA refers in this supplement to coordination and adjustment of research programs, implementation in this context refers especially to joint activities of JPI-MYBL (see also Figure 3 for an overview).

## Activities and achievements

### First Joint Transnational Call (JTC)

The preparation of the first Joint Transnational Call (JTC) is the first implementation activity following the publication of the SRA. The responsibility rested largely with CSA J-Age which enabled the development of the administrative, funding and operational models for conducting the call. The topic was determined by the GA and the content of the call was specified by the Call Consortium consisting of funding organisations from 11 partners:

**Austria:**

› *Federal Ministry of Science, Research and Economy (BMWFW)*

**Belgium:**

› *Federal Public Planning Service Science Policy (BELSPO)*

**Canada:**

› *Canadian Institutes of Health Research (CIHR)*

**Denmark:**

› *Innovation Fund Denmark*

**Finland:**

› *Academy of Finland (AKA)*

**Germany:**

› *Federal Ministry of Education and Research (BMBF)*

**Italy:**

› *Università Cattolica del Sacro Cuore (Unicatt)*

**Spain:**

› *Spanish Ministry of Economy and Competitiveness (MINECO)*

**Sweden:**

› *Swedish Research Council for Health, Working Life and Welfare (FORTE)*

**The Netherlands:**

› *The Netherlands Organisation for Health Research and development (ZonMw)*

**United Kingdom:**

› *Economic and Social Research Council (ESRC)*

The topic of the First Joint Call on the priority 6 of the SRA “A New Labour Market” (with the title “Extending Working Life and its interaction with health, wellbeing and beyond”) reflects the high priority of this challenge for Member States, although not all chose to participate in this particular joint activity. The selection of the first call theme was based on a survey among GA members and the recommendations of the SRA. The survey results were discussed in a Prioritization Workshop with members interested in funding the first call. The general approval of a theme on priority 6 of the SRA “A New Labour Market” intended to identify

effective and equitable ways of distributing employment across the extending healthy life course, including extending paid working life through governance, management and regulation. The specification of the call topic was reserved to those partners – following the principle of “variable geometry” – who decided to join the consortium and finance the call.

Concerning the administrative and procedural aspects, the design of the implementation and deployment of the call is structured in a sequential way. The first activities served to provide the grounds to decide on the organizational framework based on a workshop comparing the solutions of other EU

joint activities. After the analysis of different potential instruments to be used by this JPI and based on the prioritization of topics, the proposed call was thoroughly discussed in the General Assembly in Palermo in May 2014. It was agreed to start with the designing and preparation of the first joint transnational call and the development of the administrative structure and their funding for the implementation of joint activities. The publication and monitoring of the call was scheduled for 2015 under CSA J-Age2.

In order to design and prepare the First Joint Call the WP Implementation of CSA J-Age (see Figure 2) proposed to:

- › *Prepare the structure of the Call Documents needed (MoU, Governance and Evaluation document, Call text and proposal form) based on standard models used in other transnational programmes and following the Voluntary Guidelines on framework conditions for joint programming in research<sup>31</sup>.*
- › *Circulate these documents among interested funding organisations participating in the first joint call for them to comment on the critical points of the call: timeline, central eligibility rules, evaluation procedure, evaluation criteria, decision taken procedure, governance, conformation of evaluation panel/committees, etc. On this basis, the Call Consortium with 11 partners was constituted.*
- › *Comments received would serve as a basis for discussion during the Workshop on the operational and administrative structure for the first call. The Workshop was held in November 2014.*

- › *During the workshop every item was discussed with the objective of: Sharing the tentative funding commitment of the interested funding organisations, setting up the launching date (under CSA J-Age2), agreeing on common procedures for the management of the call, updating the calendar of steps/milestones of the call process, establishing clear steps until final validation of call documents and signatures of the MoUs, and establishing and discussing the submission tool system and costs associated with the implementation of the first call.*

31. [http://ec.europa.eu/research/era/docs/en/voluntary\\_guidelines.pdf](http://ec.europa.eu/research/era/docs/en/voluntary_guidelines.pdf)

#### **The Fast-Track project: “Understanding employment participation of older workers” (JPI UEP)**

The Fast Track UEP can be understood as an exploration exercise to increase the knowledge base on extended working lives. It was, however, also employed as an instrument to further specify the content of the First Call “New Labour Market”. The initial idea of the fast-track project “Understanding employment participation of older workers” (JPI UEP) was developed in the JPI MYBL Working Group 3 “Work & Productivity” that contributed to the creation of the Strategic Research Agenda.

The General Assembly of JPI MYBL initiated the fast track and a group of forty-six scientific experts from eleven of the fifteen JPI MYBL member countries within a relatively short period of time from May 2014 to December 2014 identified new research needs that lend themselves to joint research funding activities while exploring the potential for collaborative and comparative research.

The objective of the JPI UEP project was to define research needs with regard to the employment participation at higher working age by critically reviewing research findings, approaches and methodologies across the participating countries.

The focus of this project rests on paid work of older people, meaning those aged 50+ years. In detail, the population covered in this report are those who:

- i. *work longer (than usual, but not beyond pensionable age),*
- ii. *draw their old age pension early,*
- iii. *receive a disability pension, or*
- iv. *leave the labour force early because of unemployment or non-employment.*

Acknowledging the limited timescale of the project, the JPI UEP working group took the deliberate decision to disregard employment beyond pensionable age, especially voluntary work. The review of research includes scientific findings published in scientific publications or “grey literature” during the past ten years.

The conclusions of the Fast Track UEP report indicate three priority areas to advance research on the employment participation of older workers, namely to address conceptual gaps, close cross-national gaps, fill thematic gaps and translate scientific evidence into policy practice. These may be transferred into some overarching recommendations for researchers, research funders, as well as decision-makers in research policy and labour market policy addressing employment participation at higher working age.

- › *Conceptual gap: Bridging the lack of a broad view*
- › *National gap: Levelling of uneven cross-national coverage of research*
- › *Filling the thematic gaps in retirement research*
- › *Translating scientific evidence into policy practice*

The results of the project are available at: <http://www.jp-demographic.eu/about/fast-track-projects/understanding-employment>

### **Evaluation**

Evaluations, both internal and external, can be understood as an activity of alignment trying to establish comparable standards and methods of evaluation. Here we consider it under implementation, because experimentation and experiences with the evaluation instrument are in the foreground. After performing a first internal evaluation, the publication of the SRA renders special significance to the external evaluation to be completed in late January and early February 2015. Its objective is to look at the progress of JPI-MYBL in its stated aims, the role and contribution of the CSA J-AGE project to the JPI and the effectiveness of the governance arrangements for the JPI. The evaluation will draw on existing evidence and will collect new evidence through interviews with those involved with the JPI MYBL. This will be used by the General Assembly to keep track of the progress of the JPI.

JPI-MYBL has participated in the EC project “JPIs to Co-Work (FP7 Support Action on JPI Framework Conditions, 2011–13<sup>32</sup>) and exchanged experiences and developed instruments and indicators for evaluation & monitoring in collaboration with other JPIs.

## **Plans and next steps**

Plans and next steps are, as stated above, part of the JPI Work Programme. Some points arising in the discussion of the SRA are briefly addressed in the following.

The first implementation activities, are the preparation, launching, and monitoring of the First Joint Call and the preparation and monitoring of (at least) two more calls. The selection and prioritization of call themes will take place in 2015 and the priorities will be defined in view of the discussion on alignment of national programs and emerging priorities in Member States. Research priority 1 (Quality of Life under conditions of demographic change) and priority 8 (Impact of demographic change on social inclusion, social inequalities and intergenerational equity) are candidates for future joint calls (result of the first workshop on prioritization).

Following the experiences of other JPIs, e.g. JPND and JPI HD, JPI-MYBL will investigate if the alignment of national programs can be supported by the development of strategies, tools and guidelines to facilitate the adoption of the SRA on the national and regional/local level.

Further development of indicators for evaluation of internal processes and external impact will be conducted and alignment with evaluation methodologies of other JPIs will be explored.

## 3.4 PUBLIC ENGAGEMENT

### **What is public engagement?**

Public engagement signifies a shift in the approach to dissemination and consultation in the European Research Area (ERA). The emphasis is now on participation of citizens and the public, stakeholders and interest groups, over the entire research & innovation cycle. The aim is to include their view on societal challenges at an early stage in the formulation of research agendas and programs and to ensure feedback on societal relevance, in alignment of research strategies, implementation of research and innovation, and evaluation of societal impacts. The objective is to facilitate the utilization of scientific evidence in social and technological innovation and economic growth by more responsive and effective ways of connecting science and society. The principles of this enlargement and enrichment of the scope of societal involvement have been developed in H2020 under the “Science with and for Society” initiative (SWAFS) and the “Responsible Research Initiative” (RRI) and formulated in the Lund Declaration 2009, the Vilnius Declaration 2013, and the Rome Declaration 2014.

### **Activities and achievements**

JPI-MYBL has adopted the principles of public engagement early on by creating a Societal Advisory Board which is integrated into the R&I cycle by recommendation, consultation and evaluation. It took an influential role in the development of the SRA and was involved in all joint activities as described in the previous sections. In correspondence with the objectives of the General Assembly the SOAB has started cooperation with Public Engagement 2020, an EU project under SWAFS evaluating participative strategies and innovations in the realm of ERA. The activities of the SOAB are evaluated over the next years as “good practice” in public engagement. First achievement in this cooperation is the inclusion of a paragraph in the First Joint Call “New Labour Market” to the effect that applicants are encouraged to describe their strategies of citizen and stakeholder involvement in R&I.

The JPI-MYBL strives to raise the general public awareness of the issue and reaches out for the engagement of stakeholders and citizens in society. Special attention has been devoted, therefore, in the development of the SRA to design (e.g. graphics, icons) to enhance the public appearance of JPI-MYBL. Supported by the CSA J-Age project, the advisory boards and the RPG as well as through the national channels of GA members JPI-MYBL has

initiated a broad scope of dissemination activities. Beyond the typical measures (e.g. brochures, website, information and networking, workshops with relevant stakeholders both on EU and national level) the activities found two special highlights in the Launch Event of the SRA in April and in the JPI conference organized as the Memory Event in conjunction with the “Science with and for Society” initiative (SWAFS) in Rome in November 2014. The SRA launch in Brussels offered the opportunity to present JPI-MYBL to EU parliamentarians and representatives of the EC administration as well as to a broad scope of stakeholders on the EU level. The importance of the Memory Event in Rome rested not the least on the opportunity to establish close contacts with other JPIs (e.g. JPND, JPI Cultural Heritage, AAL) within the framework

of a common conference. The Memory Event also strengthened the integration of JPI-MYBL into the SWAFS initiative.

The Memory Event – the J-Age Final Conference held in Rome with the title “Science with and for Society – Memory: to know, to preserve, to share” organized jointly with the Italian Ministry of Health and the Italian Ministry of University and Research – gathered the attention of a wide range of experts from several areas and countries and served to introduce the SRA to a wider scientific and public audience. On the same occasion, four JPIs – JPND, MYBL, Cultural Heritage and AAL – got the opportunity of spending 2 days together, exchanging ideas and establishing cooperation in the wonderful location of the Ministry of University and Research building, in the heart of Rome.

**For more information on the partners see:**

- › *Cultural heritage: a challenge for Europe*  
<http://www.jpi-culturalheritage.eu/>
- › *JPND – Neurodegenerative Disease Research*  
<http://www.neurodegenerationresearch.eu/>
- › *JPI Urban Europe*  
<http://jpi-urbaneurope.eu/>
- › *Additional partners were contacted on other occasions:*
- › *JPI a healthy diet for a healthy life*  
<http://www.healthydietforhealthylife.eu/>
- › *Ambient Assisted Living Joint Programme*  
<http://www.aal-europe.eu/>

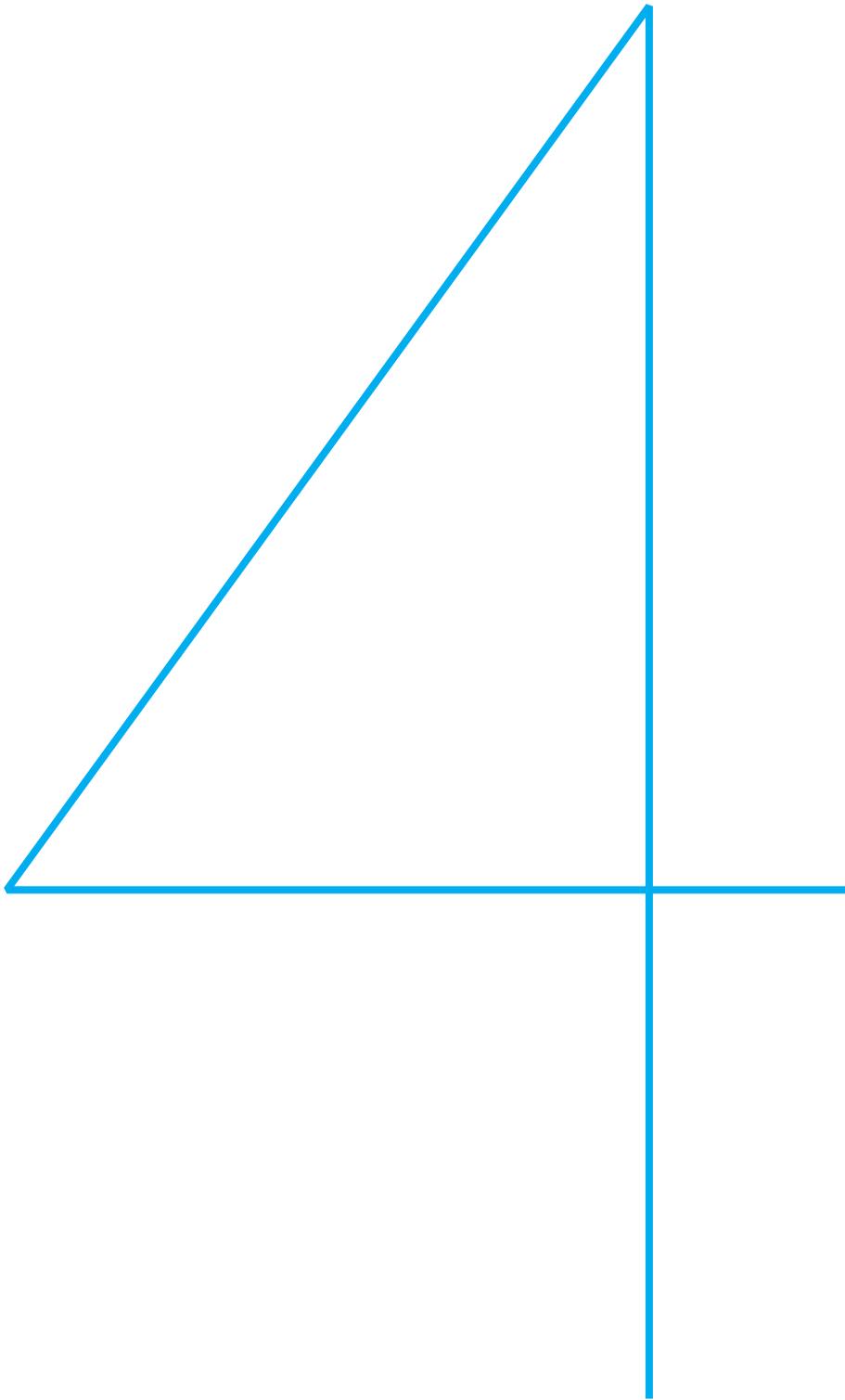
## **Plans and next steps**

The shift from dissemination to public engagement will proceed under CSA J-Age2 and is supported by an interactive platform on the JPI website mediating between JPI-MYBL and its audiences in science and policy as well as interest groups, stakeholders and European citizens.

The SOAB will organize a “Stakeholder Event” in 2015 inviting stakeholders of all other JPIs to exchange their experiences and to find a format for future cooperation. Additionally, the possibilities will be explored to exploit the national, regional and local networks of the European stakeholder organizations to raise awareness for the opportunities and challenges of demographic change and to utilize social innovations and “good practices” especially on a regional or local level for JPI-MYBL (e.g. the partners of CEMR, Eurocarers and ERRIN).

From the perspective of public engagement, the initiatives of JPI-MYBL to develop the partnerships with Eastern European Member States are also relevant. The conference organized with Eastern partners in Vienna in March 2015 will also give new impulses to including Eastern European stakeholders and citizens building on already existing networks of SOAB members.





# LOOKING AHEAD

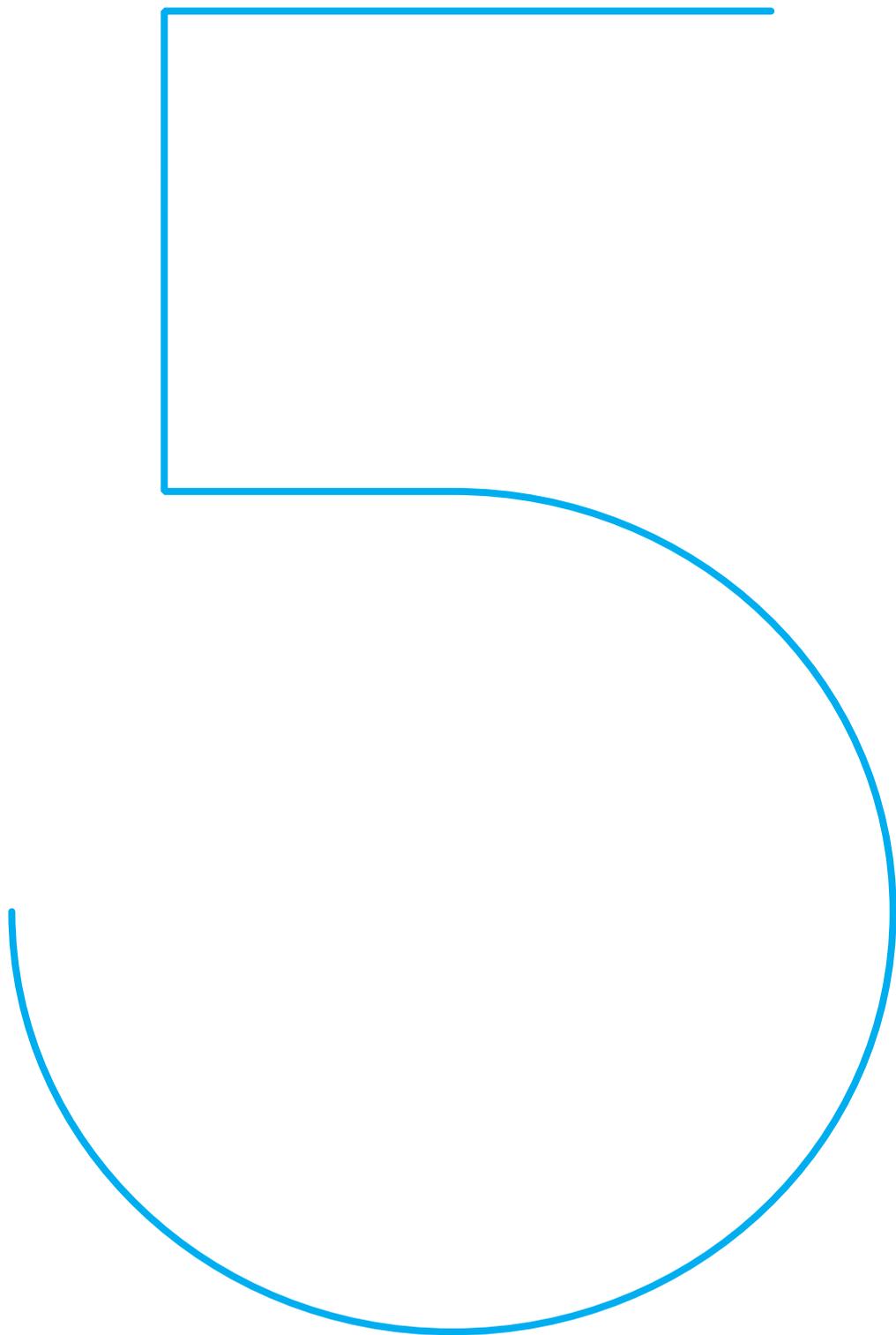
Starting in March 2015, the second project supporting JPI-MYBL – the CSA J-Age2 project – will take responsibility in monitoring exploration, alignment, implementation and public engagement. The successful application for this second CSA speaks for the importance attributed by the EC to the challenge of demographic change as well as to the instrument of joint programming under H2020 and the role of JPI-MYBL as partner in ERA. Among the tasks to be accomplished under the SRA implementation plan in 2015–2017 the specification and administration of joint activities – including the First Joint Call “New Labour Market” and further calls – will take a prominent place. These activities will comprise also a further development of the procedures of prioritization of joint activities in a “variable geometry” of participating Member States and in the spirit of “Science with and for Society”. The models of administration, funding, operation and evaluation of joint activities will be tested and improved in the light of experiences with different types of activities and by learning from the experiences of other JPIs.

The SRA will be updated to accommodate experiences from joint activities, new results from scientific and social and technological developments, and shifting political and societal

interests and priorities. The changing knowledge base has to be enriched, organized and managed as an accessible resource and tool for diverse needs in exploration, alignment, implementation and public engagement. This requires new approaches to knowledge management including knowledge hubs, utilization of expert networks, interactive websites or thematic programming going beyond consolidation of the changing state of the art in the format of a SRA.

Finally, enlarging the network of partners within and with JPI-MYBL is important. The objective is to expand and enrich the knowledge base for policy making and in the spirit of “Science with and for Society” to raise public awareness for the opportunities and challenges of demographic change. Within JPI-MYBL new partners especially among the new Eastern member states, but also from international networks will be invited to join or intensify the cooperation. Moreover, the communication within the scientific community, with other programs in H2020 and ERA, and with societal stakeholders will be further developed.

Thus, JPI-MYBL will aim for research and social and technological innovations that enable – to cite the conclusion of the SRA – “more years to mean better lives for all Europe’s citizens.”



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