



CALL TEXT

Joint Programming Initiative “More Years, Better Lives”

The Potential and Challenges of Demographic Change

Call for proposals

Extended Working Life

and

its Interaction with Health, Wellbeing and beyond

SUBMISSION DEADLINE: 2ND OF JUNE 2015 AT 12:00 (CET)

The proposal submission tool will be available on

www.ip-demographic.eu from 17.04.2015

JPI-MYBL JOINT CALL SECRETARIAT

JCS is hosted by

VDI/VDE Innovation + Technology GmbH

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INTRODUCTION: JPI-MYBL on Demographic Change

Demographic Change (DC) is becoming a key issue around the world (in this call the focus is on Europe and Canada). One of the most important aspects is the increasing life expectancy and the low and slightly decreasing fertility rates. Also complex patterns of migration contribute to demographic change. The consequence of an ageing society is a scenario where a growing proportion of the population is healthy and active but not necessarily actively participating in the labour market.

In order to respond to these changes and their economic effects, policymakers need more research done within the field of Demographic Change in order to develop new policies better adapted to these phenomena. There are potential advantages in sharing such research, since the scale and importance of demographic change goes beyond national borders. In 2010, nine EU member states (later expanded to fourteen including Canada) came together for this purpose and decided to use the EU framework for Joint Programming Initiatives (JPIs) and to create the JPI *More Years, Better Lives* (JPI-MYBL; <http://www.jp-demographic.eu>).

The objective of JPI-MYBL is the better coordination of national, European and Canadian R&D programmes and activities relevant to Demographic Change (ageing societies) in order to address the most urgent and demanding challenges.

In order to address the complexity of an ageing society and the interplay of different aspects related to this phenomenon, the JPI developed a Strategic Research Agenda (SRA)¹ through a broad consultation of experts and stakeholders. This document, agreed by the fourteen States participating in JPI-MYBL, identifies the following four main research domains, each corresponding to a cluster of policy issues:

- (1) Quality of Life, Health and Wellbeing;
- (2) Economic and Social Production;
- (3) Governance and Institutions; and
- (4) Sustainable Welfare.

The SRA also identifies eleven specific research topics. This call relates particularly to topic 6 “a new labour market”, but since the issues overlap, proposals may also integrate other topics on the agenda. Proposals under this call should explain how the research project will address the four domains identified in the SRA.

¹ The SRA can be downloaded at <http://www.jp-demographic.eu/about/documents/full-version-of-sra>

Early 2014 the JPI More Years, Better Lives initiated a fast track activity dealing with Understanding Employment Participation of older workers (UEP) (<http://jp-demographic.eu/about/fast-track-projects/understanding-employment>), focusing on paid work and the age group of 50+ years. The objective was to address the issue of employment participation among older workers in times of extending working lives and compile a critical and interdisciplinary review of the state-of-the-art research, considering the broader social and economic context in Europe.

The SRA and the UEP report, together with input from national stakeholders have contributed to the content of this first joint transnational call.

1st Joint Transnational Call

Under the umbrella of the JPI-MYBL this 1st Joint Transnational Call will be launched with funding from the following partner organisations²:

- **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 (InnoFond)**
- **Finland: Academy of Finland (AKA)**
- **France: Agence nationale de la recherche (ANR)**
- **Germany: Federal Ministry of Education and Research (BMBF)**
- **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 (ZonMw)**
- **United Kingdom: Economic and Social Research Council (ESRC)**

Furthermore the call is open to project partners of other countries, provided that their participation is fully self-funded.

² The JPI is a collaboration between national funding bodies, and is not a European funding programme in its own right.

Objective of the Call

The objective of this call is to support innovative and interdisciplinary research into the drivers to, and constraints on, extending working life. Research is expected to cross the traditional boundaries of Government departments and occupational sectors and to examine the implications of extending working life for older workers (50+), new labour markets, health, wellbeing and intergenerational equity.

In this context, this call invites proposals for funding research into one or more of four broad topics:

- (i) Modern work factors**
- (ii) Longer working life & Inequality**
- (iii) Health challenges**
- (iv) Caring responsibilities**

Background

Most countries are experiencing rising life expectancy and a consequent shift in the age profile of the population. However, despite general improvements in health, most people in Europe and Canada have effectively retired before the normal or statutory retirement age in their country, leaving a growing group of people in relatively good health who could make a larger contribution of skills, knowledge and experience to society through paid and unpaid work.

To respond to this, policymakers need to find more effective and equitable ways of distributing employment across the longer healthy life course, including extending paid working life, while recognising the needs of caregivers, workers with health challenges and those in physically or mentally stressful occupations.

Most Governments are trying to raise real retirement ages, but for such strategies to be effective, it is necessary to understand the factors which encourage or prevent longer working life. However, previous research has often concentrated on single factors, without adequately recognising the complex and mutually dependent interaction of factors influencing work and retirement in later life. Answering these questions calls for an understanding, which crosses the boundaries of academic disciplines and of Government Departments.

The JPI has explored these issues in its Strategic Research Agenda and in the “Fast Track” project on understanding employment participation in later life. In the light of this previous work, the present call focuses on four topics : (i) **Modern work factors**: the interactions of longer working life with the changing nature and organisation of paid and unpaid work; (ii) **Longer working life & Inequality**: the extent to which extending working life impacts

differently on different kinds of people, or people in different circumstances; (iii) **Health challenges**: the impact of longer working on health, and health on longer working; (iv) **Caring responsibilities**: the impact of longer paid work on the caring responsibilities of individuals and society at large. These topics interact with each other, but we expect that all four will feature in the research to be funded under this Call.

Call Topics

Proposals should focus on one or more of the four broad topics outlined below.

(i) Modern work factors

The nature, organisation and management of work in Europe and Canada have been changing substantially over recent decades. New jobs and ways of working create new risks and opportunities both for individuals and for society at large. Some sectors and occupations are becoming more important, while others are declining. Some work is becoming more secure, while other work is less so.

Flexible working conditions, and new and emerging technologies bring new challenges but also opportunities for older workers. Extending working life is itself likely to produce changes in the way work is organised and managed.

Relevant research questions for this topic include:

- How far, and in what ways, are current changes in the way work is organised and managed (including employers' incentives and disincentives) improving or restricting opportunities for people to work longer?
- How can the management and organisation of work be most effective in enabling people to work longer?

(ii) Longer working life & Inequality

Extending working life has very different implications for different groups, who may be affected by many factors including health, domestic and caring responsibilities, migrant status, social position and gender. Those who have worked in heavy manual occupations are more likely to suffer health problems, and have lower life expectancy, but are often treated in the same way in policies to extend working life. Research is needed into how different social and occupational groups are impacted by extending working life, and into how individuals cope with the resulting pressures and opportunities, including how these changes affect the experience of retirement itself.

Relevant research questions for this topic include:

- How far do policies to extend working life impact differently on different groups of people, considering differences including gender, occupation, education, disability, family status, migrant status, and age cohort? How do such policies affect factors like life expectancy, quality of life, health and retirement?
- What strategies and policies for extending working life ensure that all older people are fairly treated?

(iii) Health challenges

Health factors have a major effect on individuals' ability and aspirations to work longer. Overall, the effect of health is complex; to some individuals good health can be a driver for a long working life while to others it can be a driver of early retirement. Some jobs directly harm health or require physical or mental capabilities which decline with age. On the other hand, in some circumstances staying in work has a positive impact on health and wellbeing. Good work design and appropriate technologies can both contribute to enabling people to remain healthy and continue to work.

Relevant research questions for this topic include:

- What are the consequences of raising formal retirement and pension ages for a worker's health, work ability, work motivation and quality of life?
- What technologies or strategies for organising work and managing health conditions are effective at reducing premature retirement?
- What strategies are effective in helping older people to maintain a valued and significant contribution to society, through paid or unpaid activity?

(iv) Caring responsibilities

Whilst researchers have examined the impacts of labour market and welfare state regimes on older workers' employment trajectories, there has been less attention to the impact of family and household structure and change. Furthermore, expectations of the relative roles of family and state in providing care for children and elders vary greatly across Europe. The consequences of (highly-gendered) caring obligations on retirement behaviour and extended working life requires further study, including attention to the impacts of these caring responsibilities on the whole household and its organisation across the life course, and the impact of current and emerging technologies and integrated service on caring responsibilities.

Relevant research questions for this topic include:

- How do caring responsibilities affect retirement decisions?
- What are the consequences for family care when older people work longer?

Proposal Requirements

The call is inviting innovative interdisciplinary research proposals. Proposals seeking to address the substance of this call should be solution-driven and have a potential positive impact on issues relating to the call topics. We welcome quantitative as well as qualitative research proposals from all social sciences, the humanities, engineers, natural scientists and the health research community. The research proposals may cross one or more of the four topics in this call.

Research outputs should be able to inform decision-making (including public, private and communities) and innovation (societal, organisational, institutional and technological), recognising the complexity of the associated decision-making processes and innovation challenges.

Proposals should explain how they are addressing the issues identified in the JPI Strategic Research Agenda, and especially the specific topic of “a new labour market”. They may also wish to refer to the work of the JPI’s Fast Track project, “Understanding employment participation of older workers” (see <http://jp-demographic.eu/about/fast-track-projects/understanding-employment/>). Relevant empirical information might be found at <http://www.jpi-dataproject.eu/> as well.

Applicants can use various approaches, such as synthesis of existing knowledge, gathering new data, improving specific process understanding, model development and evaluation, intervention studies, scenario analysis, both in a historical and future oriented perspective etc. In the selection of approach it should be kept in mind that the proposals should be policy relevant.

It is crucial for all proposals to be guided by research questions addressing European (+ Canadian) dimensions. In this context, the focus on comparative investigations based on different member states seems to be a valuable source for identifying functioning mechanisms/models and examples for good practise (interplay of different means, implementation of policies). As there is no harmonised European labour market/social system, research results should generate knowledge on specific as well as “systematic” conditions and means that could be transferred from one sector to another and/or from one national setting to another (“European (+ Canada) added value”).

Applicants are encouraged to describe in their proposal the expected impacts on society and the strategies planned for participation and involvement of citizens and stakeholders to facilitate communication between research and society and the implementation of research results in practice.

I. APPLICATION

1.1 ELIGIBILITY

Joint research proposals may be submitted by applicants belonging to one of the following categories (according to national eligibility criteria):

Public and private scientific, research, technological and innovation institutions; universities; research active industry; NGOs; other institutions involved in research activities as long as they are eligible for funding. Depending on national eligibility criteria, private companies, public institutions and other stakeholders may also participate as partners in the project consortia.

Only transnational projects will be funded. Each proposal must involve **a minimum of three eligible applicants from at least three different countries participating in the call. The maximum number of eligible participants in a project consortium is seven.** The consortium should be reasonably balanced, i.e. not more than two eligible applicants per country are allowed. Participants not eligible to be funded (e.g. from non-funding countries or not fundable according to national regulations of the participating funding countries) may participate in a project proposal if they are able to secure their own funding. Such participants should state in advance the source of funding for their part in the project. However, the majority of participant groups in a consortium and the Principal Investigator must be eligible to be funded by participating countries, according to the national regulations (see Annex).

The number of participants and their research contribution should be appropriate for the aims of the transnational research project. Each transnational collaborative project should represent the critical mass to achieve ambitious scientific goals and should clearly demonstrate an added value from working together.

Each consortium must nominate a **Principal Investigator (PI)** among the project's co-Principal Investigators (co-PI). The PI must be considered an eligible project applicant by one of the funding organisations participating in the call. The PI will represent the consortium externally and towards the Joint Call Secretariat (JCS) and Call Steering Committee³ (CSC), and will be responsible for its internal scientific management (such as controlling, reporting, intellectual property rights (IPR) issues and contact with the JCS). Each co-PI will be represented by one (and only one) group leader. Within a joint proposal, each PI will be the contact person for the relevant national funding organisation.

³ Call Steering Committee: funding organisations' representatives.

Each applicant can submit up to two research proposals as co-PI or only one as PI (e.g. the PI of a proposal cannot be partner in another proposal). Please note that this rule is subject to national regulations, therefore applicants are strongly encouraged to contact their national contact points to check their national eligibility rules before submission.

Whilst proposals will be submitted jointly by research groups from several countries, individual research groups will be funded by their national funding organisation. The applications are therefore subject to eligibility criteria of relevant national funding organisations of the respective country/region. It is highly recommended to read carefully the funding rules and eligibility criteria of the relevant funding organisation. **Applicants are strongly advised to contact their relevant funding organisation contact person before submitting an application; please note that for some countries it might be mandatory.**

*Please note that if an applicant is found to be non-eligible by one of the funding organisations after the eligibility check, the entire proposal **will be rejected without further review.***

The duration of the projects can be up to three years. Nevertheless, a partner can receive funding for less than 3 years according to funding organisations eligibility criteria and regulations.

1.2 FINANCIAL AND LEGAL MODALITIES

Eligible costs and funding provisions may vary according to the respective funding organisation's regulations. Each applicant is subject to the rules and regulations of their respective national funding organisation.

1.3 SUBMISSION OF JOINT PROPOSALS

Joint proposals (in English), must be submitted to the online submission website no later than **02-06-2015 at 12:00 CET**. The server will not accept proposals after this time. Information on how to submit proposals electronically is available in the "Document for Governance of the call and Evaluation Procedure" on the website www.jp-demographic.eu. The electronic submission tool will be available on this website from 17.04.2015.

For applicants from some countries it might be mandatory to submit the proposal and/or other information, in some cases before the deadline of this call, directly to the national funding organisations. Therefore, applicants are strongly advised to check their funding organisations specific "Guidelines for applicants" for more details.

1.4 FURTHER INFORMATION

If you need additional information, please contact the JCS, or your national funding organisation Contact Person (see "Guidelines for applicants" or the website).

II. EVALUATION

The evaluation of the Joint Transnational Project proposals will be organised as follows:

2.1 FORMAL CHECK OF PROPOSALS

The JCS will check all proposals to ensure that they meet the call's formal criteria (date of submission; number and category of participating countries; inclusion of all necessary information in English; appropriate limits on length). In parallel, the JCS will forward the proposals to the corresponding national funding organisations which will perform a check for compliance to national rules. Proposals passing both checks (JCS and national) will be forwarded to the Peer Review Panel⁴ (PRP) members for evaluation. Proposals not meeting the formal criteria will be declined without further review. **Please note that if a proposal includes one non-eligible partner, the whole proposal will be rejected.**

2.2 PEER-REVIEW OF PROPOSALS

There are two steps in this reviewing procedure:

- **Remote evaluation:** each proposal will be allocated to three reviewers who fit the profile of the application. The first step of the peer review procedure will be a written evaluation. All reviewers will be asked for reports and scoring on the proposals according to specific evaluation criteria and a scoring system (see the evaluation procedure below).
- **Peer review panel meeting:** The PRP members will have access to all the remote evaluations before the PRP meeting. At the PRP meeting reviewers should identify the proposals recommended for funding and not recommended for funding. Proposals recommended for funding will be ranked by the PRP according to the evaluation criteria.

The reviewers of the Peer Review Panel will perform the evaluation according to

⁴ Peer Review Panel: international reviewers that will review the applications according to their expertise.

confidentiality rules and specific evaluation criteria (see below), using a common evaluation form. A scoring system from 1 to 5 will be used to evaluate the proposal's performance with respect to the different evaluation criteria. Scoring system: 1: poor; 2: fair; 3: good; 4: very good; 5: excellent.

Evaluation criteria:

- **Relevance and clarity of objectives** in relation to the aims of the call
- **Scientific quality of the proposal** (scientific excellence of the proposal in terms of innovative approach, originality and expected progress beyond the state of the art, availability and quality of existing data, comparative perspective and multidisciplinary)
- **Quality of the project consortium** (international competitiveness of participants in the field(s), previous work and expertise of the participants, added value of the transnational collaboration, participation of early career researchers)
- **Feasibility of project plan** (relation of work packages to proposal themes and aims, quality of work plan and time schedule, balanced participation of project partners, quality and efficiency of the coordination and management, scientific justification and adequateness of the requested budget and risk assessment)
- **Potential impact on society and citizens** (response to actual societal needs, providing evidence for policy makers and practitioners; early integration of relevant stakeholders, ensuring societal relevance over the course of the project and its dissemination).

2.3 FINAL DECISION ON FUNDING

Based on the ranking list established by the PRP, the CSC will select the projects to be funded (shortlist). Based on this list, final decisions will be made by national funding organisations and will be subject to budgetary considerations. The JCS will communicate to all applicants the final decision, and the evaluation report in due time.

2.4 PROJECT START AND CONSORTIUM AGREEMENT

Projects selected for funding are expected to start during the first quarter of 2016. Consortium members must fix a common project start date, which would be the reference date for yearly and final monitoring reports and potential extensions. This common project start date must appear in the Consortium Agreement (CA).

It will be the responsibility of the PIs to draw up a CA suitable to their own group in order to manage the delivery of the project activities, finances, intellectual property rights (IPR) and to avoid disputes which might be detrimental to the completion of the project.

All consortium members must sign the CA and send it to the JCS. This consortium agreement will be made available to the concerned funding organisations. The project consortium is strongly encouraged to sign this CA before the official project start date, and in any case the CA has to be signed no later than six months after the official project start date. Please note that national regulations may apply concerning the requirement for a CA (contact your national contact point or check the country-specific information on the guidelines). Further instructions will be provided by the JCS to the coordinators of the projects selected for funding.

2.5 CONFIDENTIALITY OF THE PROPOSALS

Proposals and any information relating to them shall be kept confidential within the reviewers and the CSC. Proposals shall not be used for any purpose other than the evaluation and subsequent monitoring of the funded projects.

Full proposals will be required to include a publishable summary, which will clearly identify the main goals of the project. If a proposal is funded, this information will be published on the JPI MYBL website. All other project details shall be kept strictly confidential, although **national rules prevail**.

III. REPORTING REQUIREMENTS AND DISSEMINATION

Each PI, on behalf of the project consortium, should submit to the JCS a brief annual progress report at the beginning of the second and third year project. In addition, it should be submitted a final scientific report of the transnational project (in English) no later than two months after the end of the project. These reports should state the scientific progress, the goals that have been met, and corrective measures set in case that the annual project plan has not been fulfilled. When applicable, each team might have to report to its relevant funding organisation, in accordance with the respective national regulations.

In case of any significant changes in the work program or the consortium composition, the PI must inform the JCS, who will inform the relevant funding organisations, who will decide upon the proper action to be taken.

Funding recipients must ensure that all results (publications, etc.) of their research project's consortium activities include a proper acknowledgement that the projects were supported in part by the respective funding organisations under the framework of the JPI MYBL initiative.

Moreover, PIs and/or co-PIs may be asked to present the results of their projects, at an intermediate and/or a final status seminar, during JPI MYBL events.

ANNEX I. SUMMARY OF THE PARTICIPATING FUNDING ORGANISATIONS, INDICATIVE FUNDING COMMITMENTS AND ELIGIBILITY

PARTICIPATING FUNDING ORGANISATION	COUNTRY	TENTATIVE INITIAL FUNDING COMMITMENT (Euros)	ENVISAGED NUMBER OF PROJECTS POTENTIALLY FUNDED
Federal Ministry of Science, Research and Economy (BMWFV)	AUSTRIA	500.000€	1-5
Belgian Science Policy Office (BELSPO)	BELGIUM	500.000€	2
Canadian Institutes of Health Research (CIHR)*	CANADA	CAD \$750.000 530.000€ (approx.)	3
Innovation Fund Denmark (InnoFond)	DENMARK	1.000.000€	2-3
Academy of Finland (AKA)	FINLAND	900.000€	2-4
Agence nationale de la recherche (ANR)	FRANCE	700.000€	3
Federal Ministry of Education and Research (BMBF)	GERMANY	1.000.000€	-
Spanish Ministry of Economy and Competitiveness (MINECO)	SPAIN	300.000€	3-5
Swedish Research Council for Health, Working Life and Welfare (FORTE)	SWEDEN	1.200.000€	2-5
The Netherlands Organisation for Health Research and Development (ZonMw)	THE NETHERLANDS	400.000€	2
Economic and Social Research Council (ESRC)	UNITED KINGDOM	£500.000 750.000€ (approx.)	2-3
TOTAL		7.780.000€ minimum budget expected	

*CIHR will fund up to a maximum of CAD \$750.000. CIHR funding will be granted according to CIHR policies.

ANNEX II. ELIGIBILITY OF BENEFICIARY INSTITUTIONS

PARTICIPATING FUNDING ORGANISATION	COUNTRY	ELIGIBLE BENEFICIARY INSTITUTION		
		ACADEMIA	CLINICAL/PUBLIC HEALTH	COMPANY
Federal Ministry of Science, Research and Economy (BMWFW)	AUSTRIA	Yes	Yes	Yes
Belgian Science Policy Office (BELSPO)	BELGIUM	Yes	Yes (all public research centers, all non-profit organisations having the pursuit of research in their statutes)	No
Canadian Institutes of Health Research (CIHR)*	CANADA	Yes	Yes	No
Innovation Fund Denmark (InnoFond)	DENMARK	Yes	Yes	Yes (on certain conditions)
Academy of Finland (AKA)	FINLAND	Yes	Yes	Yes
Agence nationale de la recherche (ANR)	FRANCE	Yes	Yes	Yes
Federal Ministry of Education and Research (BMBF)	GERMANY	Yes	Yes	Yes
Spanish Ministry of Economy and Competitiveness (MINECO)	SPAIN	Yes*	Yes (non-profit)*	No*
Swedish Research Council for Health, Working Life and Welfare (FORTE)	SWEDEN	Yes	Yes	No
The Netherlands Organisation for Health Research and Development (ZonMw)	THE NETHERLANDS	Yes	Yes	No
Economic and Social Research Council (ESRC)	UNITED KINGDOM	Yes	Yes * Only Travel and Subsistence costs allowed for Government departments	Yes* staff salary cost of up to 1 year FTE and T&S but this must be less than 30% of the total

			<p>Third sector and charities can claim staff salary cost of up to 1 year FTE, T&S, overheads and other indirect costs but this must be less than 30% of the total ESRC costs.</p>	<p>ESRC costs. Businesses cannot claim overheads and other indirect costs</p>
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It is highly recommended to get in touch with the respective national contact point in order to clarify formal funding conditions.