



# CALL TEXT

**Joint Programming Initiative “More Years, Better Lives”**  
The Potential and Challenges of Demographic Change

**Call for research proposals 2017**

## **Ageing and place in a digitising world**

**SUBMISSION DEADLINE: 03 OF APRIL AT 17:00 (CET)**

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Link to electronic proposal submission

### **JPI MYBL JOINT CALL SECRETARIAT**

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## I. BACKGROUND

The first call 2015 of the JPI More Years Better Lives dealt with extending working life and its interaction with health, wellbeing and beyond. It supported research on the drivers to, and constraints on, extending working life. The second call 2016 supported research oriented in improving our understanding of how different approaches to welfare secure the quality of life, distribute resources across generations, and confront to the later stages of life, including caring needs, frailty and the end of life.

This Call 2017 **“Ageing and place in a digitising world”** is concerned with the ways in which the health and wellbeing of older people, at all stages of later life, is supported and promoted through the design of the social and physical environment, access to opportunities to learn, and the use of technologies of all kinds. As it is conventional, with “older” we here broadly refer to anyone over the age of 50: from those who are still healthy and active to those in the final stages of life, whether living at home or in long-term institutions. This group is rapidly growing in the population and the experience of later life is changing for many people. Although many older people remain very active, as they age, they are increasingly likely to have particular needs in terms of their living environment. To participate in learning and to have access to new technologies -and to be able to use them- becomes even more important as we age as our conditions, prospects and abilities are changing.

The overarching aim of our JPI is to find ways to improve the health and wellbeing of older people, to enable less-active elderly to be more engaged in social life and more active contributors to wider society, and to do this in cost-effective ways. Also, it is important to recognise the diversity of older people and to ensure that practical and policy changes do not unfairly put them at a disadvantage on the basis of factors like gender, ethnic origin, social class, location or disability.

To achieve this, we need a better understanding of how to introduce changes based on a multitude of needs in older people. We are interested, therefore, in understanding the implementation of new technologies in an inclusive manner, to help finding new solutions which accommodate individuals’ needs, aspirations and limitations, as well as the ways in which they learn and interact with others.

Under the umbrella of the JPI MYBL, the 3<sup>rd</sup> Joint Transnational Call will be launched with funding from the following partner organisations<sup>1</sup>:

- Federal Ministry of Science, Research and Economy (BMFWF), Austria (formal decision pending)
- Federal Ministry for Transport, Innovation and Technology (BMVIT), Austria (formal decision pending)
- Fund for Scientific Research (FNRS), Belgium
- Research Foundation Flanders (FWO), Belgium
- The Canadian Institutes of Health Research (CIHR), Canada
- Academy of Finland (AKA), Finland
- Federal Ministry of Education and Research (BMBF), Germany

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<sup>1</sup> The JPI is a collaboration between national/regional funding bodies, and it is not a European funding programme in its own right.

- Ministry of Education, University and Research (MIUR), Italy
- Ministry of Economy, Industry and Competitiveness – State Agency for Research, Spain
- National Institute of Health Carlos III (ISCIII), Spain
- The Swedish Research Council for Health, Working Life and Welfare (FORTE), Sweden
- The Swedish Innovation agency (Vinnova), Sweden
- The Netherlands Organisation for Health Research and Development (ZonMw), The Netherlands

## II. RESEARCH TOPICS

Each application shall address the topic of Technology (1). Applications may also address topics of Place (2) and Learning (3), in relation with Technology (1). That is: applications shall address Topic 1. Applications may address Topic 1 and Topic 2, Topic 1 and Topic 3, or Topic 1-2-3 together. The interaction between **technology, place and learning** is important to the health of older people, and research which explores them may produce important new findings to inform policy.

1. **“Technologies”**, especially digital technologies, are constantly evolving, and these changes have an important impact on the quality of individuals’ lives, on their engagement with others, and on their participation in wider society. We need to understand how existing and emerging technologies can improve the quality of life, contribution and social engagement of older people.

Technological and social changes are intimately linked, and the former is happening at an accelerating pace, often in unexpected forms. Some technologies are designed to address issues specifically related to an ageing population or to those facing health and disability issues common among older people; while others provide unexpected benefits or risks to this age group. Some can help to cope with physical limitations, overcome isolation and share knowledge and experience. Workplace technologies can make extended working life possible for some (like the health insurance portability and accountability), or may reduce the likelihood of people entering retirement with work-related health conditions. Some technologies also find translation in new social behavior, like in life logging.

However, not all who might benefit from technology have opportunities to acquire appropriate skills and confidence. Thus, appropriate learning opportunities are needed. Research needs to explore how existing and emerging technologies can be implemented in an optimal way to contribute to quality of life for older people, and how policy decisions, standards and incentives to designers and commercial organisations can support positive developments. Moreover, for new technological products to be successfully implemented and marketed, it is crucial to understand barriers to acceptance that may prevent the potential users and beneficiaries of novel technologies to embrace the new possibilities they facilitate.

It is also a requirement to explore how implementation of technologies can enhance older peoples' ability to contribute to society. How technologies can facilitate social engagement of older people, especially those from socially-excluded groups, who may be particularly reliant on public services being converted to online forms. Above all, it needs to explore how older people can be active agents in developing technologies and their uses, and its relation to health.

2. **“Place”** refers to how individuals experience the places where they live, work and engage with others, and how learning and technology enhance or diminish their quality of life. While it is well studied what kinds of housing, transport and urban planning are most effective at enabling people to remain independent and socially engaged throughout the lifespan, we need to understand policies and ways to achieve desired changes.

The physical environment is shaped by a very complex mix of factors, historical and contemporary. These include planning systems and policies at local and regional levels, the design and modification of housing and transport systems, and by assistive technologies, in the home and/or at nursing homes. We need to better understand how these interact to affect the quality of life of older people, especially in very old age (80 plus); and how they can be developed in a coherent and economical way. Some of these are amenable to relatively quick modification, but others, like urban planning, develop over decades. In some cases, standards and regulations can influence new design and future opportunities, in other cases change must be encouraged through the training of professionals, and the creation of appropriate consultative processes. Regional, municipal and local governments are key partners here, since they are usually responsible for these services on the ground.

3. **“Learning”** in all its forms, is critical to people's ability to make the best use of the opportunities available to them, as to avoid cognitive decline. While it is clear that learning can contribute to quality of life across the extended lifespan, we need to better understand how opportunities for such learning can best be made available, by public, private and third sector means. It is important to find examples of, and develop policies for, increased access to learning and competence development across age.

Despite public endorsement for lifelong learning in international policy papers, education and often, learning of any kind, is seen as a matter for young people; demographic change challenges this idea. Those in paid work need to update and maintain skills in changing value creation settings that are marked by a fundamental and accelerating digitization of almost all sectors. Education, intervention and advice can improve financial literacy, helping people make better-informed decisions about the timing and management of retirement. Learning can help people to prepare for the new challenges of later life, for successful retirement, for new voluntary roles (including caring), for new civic responsibilities. Research on how “Adult education” can enhance health and wellbeing is needed in order to find ways to overcome isolation and loneliness, enabling them to rebuild their lives and social networks after retirement, separation or bereavement. Research on how learning programmes can be integrated in residential care institutions, or how to find ways to improve interaction with social robots, *etc.* may improve health and wellbeing.

This goes beyond the provision of more "courses". Much – perhaps most – learning by older people happens in voluntary and informal settings, some of it is organised by older people themselves. Thus, examples and policies should be developed to ensure that an appropriate and sustainable range of opportunities is available to all old people, through public, private and third sector agencies with appropriate infrastructure to mobilise voluntary effort.

### III. OUTCOMES

Proposals should indicate how applicants plan to increase understanding of the actions to be taken to improve the health and wellbeing of older people. Examples of the kind of issues which might be explored might include:

- a) The way older people perceive the relationships between their lives, environments, learning and technologies, including the role of paid and unpaid work, can be used when implementing new solutions and new infrastructure in elderly care;
- b) The implications of demographic change for the future aspirations, needs, and consumption patterns of older people;
- c) How emerging technologies, such as exoskeletons and social robotics, etc., can be introduced to alter homes and places, how older people actually use (or do not use) them, and how these technologies reshape roles and responsibilities in wellbeing and care;
- d) Strategies for supporting older persons learning in all its forms;
- e) Strategies for user involvement of the older in the design of social and physical environment and technologies;
- f) A richer vision of a creative and active later life with technology as a basis for new design methodologies;
- g) The social, economic, health, cultural and political implications of particular scientific and technological innovations, current and past;
- h) The potential of technology and learning to enhance the effectiveness of health services and systems;
- i) The development of organizational strategies and adaptive assistive technologies for securing the quality of life of older people, including the employability of older workers;
- j) Insights about the needs and requirements of local authorities for supporting and enhancing the implementation of new technologies and new management systems in elderly care, e.g. necessary decisions at municipality level to create the best possible environment for elderly care, or what stakeholders have been involved in successful elderly care developments.

### IV. RESEARCH REQUIREMENTS

We are aiming to fund innovative, transnational and interdisciplinary collaborative projects that investigate the potential of technology, place and learning in relation with the older.

Every proposal must explain how the research and its methods will ensure societal relevance by:

1. Informing policymakers and other stakeholders at national, regional and local levels about the implications and possible development opportunities arising from their findings;
2. Assessing the cost-benefits balance of different interventions, who produces the benefits and who bears the costs (including “hidden” costs borne by for instance family members and wider society);
3. Identifying the roles of different actors – what part is played by the state, family, community, the market, and civil society; the extent to which decisions are centralised or devolved; and the roles of different levels and kinds of governance;
4. Engaging relevant stakeholders in their work including those concerned with conducting research and the implementation of its results, and those who are affected by it;
5. Examining how different approaches affect equity, gender, and social inclusion – who benefits and who loses, and how individuals are enabled to be active participants in decision making;
6. Assessing the ability of models to evolve in response to changing circumstances;
7. Assessing the ethical implications of particular approaches;
8. Bringing an international comparative perspective to their work.

## V. COLLABORATION AND SYNERGY

It is expected that projects funded under this call are willing to participate in sharing knowledge with each other. To encourage the sharing of knowledge and ideas, [JPI MYBL](#), [AAL](#) (Active and Assisted Living Programme) and [COST](#) (European Cooperation in Science and Technology) have agreed to collaborate and to jointly address some of the key issues in their fields, which are of interest to the research and innovation community. The EU COST mechanism offers a possibility to support networking between the projects funded under this call and others, notably those supported by AAL.

## VI. APPLICATION

### 1. ELIGIBILITY

Proposals may be submitted by applicants belonging to one of the following categories (according to national/ regional eligibility criteria):

Public and private scientific research, technological and innovation institutions, universities, other higher education institutions. Research active industry, NGOs, and other institutions such as private companies, public institutions and other stakeholders involved in research activities, may participate in the project consortia as long as they are eligible for funding through national/regional eligibility criteria. The eligibility of the aforementioned entities, together with details of eligible costs (personnel, material, consumables, travel money, investments...), are subject to the individual administrative and legal requirements of each funding organisation and may therefore vary. Potential applicants are strongly encouraged to consult the relevant national funding agencies/bodies regarding questions of eligibility. To this end, a list of contact details will be added to the call text (Annex II), and published on the JPI MYBL website (<http://www.jp-demographic.eu>).

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 applicants in a project consortium is seven.** The consortium should be reasonably balanced: not more than two eligible applicants per country/region and funding organisation are allowed. Participants not eligible to be funded (e.g. from non-funding countries or not fundable according to national/regional regulations of the participating funding organisations) 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 Coordinator shall be eligible to be funded by the participating funding organisations, according to the national/regional regulations (the list of National Contact Points is provided in Annex I).

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.

There are two different roles within each transnational research consortium: *Coordinator* and *Partner*. Each consortium must nominate a coordinator among the project's applicants; the other applicants will be considered partners. **The Coordinator must be considered an eligible project applicant by one of the funding organisations participating in the call.** The coordinator will represent the consortium externally towards the Joint Call Secretariat (JCS) and Call Steering Committee<sup>2</sup> (CSC), and will be responsible for its internal scientific management (such as controlling, reporting, intellectual property rights (IPR) and contact with the JCS). Each partner will be represented by one (and only one) group leader (local PI). Within a joint proposal, each group leader will be the contact person for the relevant national/regional funding organisation.

**Each applicant can submit up to two research proposals as partner or only one as Coordinator** (i.e. the Coordinator of a proposal cannot be partner in another proposal). Please note that this rule is subject to national/regional regulations, which may entail further restrictions. Therefore applicants are strongly encouraged to contact their national/regional contact points to check their national/regional eligibility rules before submission (see also "Guidelines for applicants").

Whilst proposals will be submitted jointly by research groups from several countries, individual research groups will be funded by their respective national/regional funding organisation. The applications are therefore subject to eligibility criteria of relevant national/regional 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 (see Annex I).**

**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.**

<sup>2</sup> Call Steering Committee: funding organisations' representatives.



**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 national/regional regulations.

Each project shall address Technology (topic 1), and it may address Technology in relation with Place (topic 2) and Learning (topic 3). **Applications not addressing Technology will be discarded.**

### 1.1 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/regional funding organisation. This means that the applying consortia have to adapt to the conditions set up by the addressed funding organisation.

### 1.2 Submission of joint proposals

Joint proposals (in English), must be submitted to the online submission website by the Coordinator no later than **03 April 2017 at 17:00 CET**. The server will not accept proposals after this time. Information on how to submit proposals electronically is available in "Guidelines for applicants" and "Proposal template" on the website.

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 respective national/regional funding organisation. Therefore, applicants are strongly advised to contact their funding organisations' contact person (Annex I).

### 1.3 Further information

If you need additional information, please contact the JCS or your national/ regional funding organisation' contact person (Annex I).

## 2. EVALUATION PROCEDURE

The evaluation of the proposals will be organised as follows:

### 2.1 Formal eligibility 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 funding organisations, which will perform a check for compliance with national/regional rules. Proposals passing both checks (JCS and national/ regional) will be forwarded to the Peer Review Panel<sup>3</sup> (PRP) members for evaluation. Proposals not meeting the formal criteria will be declined without further review. **Please note that if a proposal includes**

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<sup>3</sup> Peer Review Panel: international reviewers that will review the applications according to their expertise.

**one non-eligible applicant, and also unable/ not able to secure their own funding, 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 relevant reviewers. 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).
  - **Rebuttal stage:** before the PRP members meet to discuss each proposal in the PRP meeting, each Coordinator is provided with the opportunity of studying the assessments and commenting on the arguments and evaluations of the reviewers, which remain anonymous. This stage allows applicants to comment on factual errors or misunderstandings that may have been committed by the reviewers while assessing their proposal and to reply to reviewers' questions. However, issues which are not related with reviewers' comments or questions cannot be addressed and the work plan cannot be modified at this stage. The applicants will have up to five open days for this optional response to the reviewers' comments. Answers sent after the notified deadline, or not related with reviewers' comments or questions will be disregarded.
- **Peer review panel meeting:** After the rebuttal stage, PRP members will meet to discuss the proposals in the PRP meeting. This stage is managed by the JCS. The PRP members and CSC members will have access to all proposals, all the remote evaluations and rebuttals before the PRP meeting. At the PRP meeting reviewers will 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 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 six evaluation criteria. In addition, reviewers will assess if proposals are within the scope of the JTC.

**Scoring system: 1: poor; 2: fair; 3: good; 4: very good; 5: excellent.**

Six evaluation criteria:

- **Relevance:** clarity with the objectives and their respective relevance in relation to the aims of the call.
- **Scientific quality:** 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 interdisciplinarity.
- **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 junior 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/or policy:** 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).
- **Gender dimension:** a proposal is considered gender relevant when it can be expected that its findings affect women and men or groups of women and men differently. In these cases, applicants should integrate gender issues and, when relevant, specific studies as part of the proposals. Also, gender balance in applicants' consortia will be noted.

### 2.3 Final decision on funding

Based on the ranking list established by the PRP, the CSC will select the projects to be funded. Based on this list, final decisions will be made by national/regional funding organisations and will be subject to budgetary considerations. The JCS will communicate to the Coordinator the final decision and send the evaluation report in due time. The partners should be informed by their Coordinator.

### 2.4 Project start and Consortium Agreement

Projects selected for funding are expected to start during the fourth quarter of 2017. 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 a Consortium Agreement (CA). Please note not all funding organisations demand a CA (please check the national eligibility criteria).

It will be the responsibility of the Coordinator 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.

The CA will be made available upon request to the concerned funding agencies. **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/ regional regulations may apply concerning the requirement for a CA (contact with the respective national contact point is advised). 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 by reviewers and the CSC. Proposals shall not be used for any purpose other than the evaluation and subsequent monitoring of the funded projects.

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/ regional rules prevail**.

### 3. REPORTING REQUIREMENTS AND DISSEMINATION

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

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

All consortium members must ensure that all results (publications, etc.) of their research project's consortium activities include a proper acknowledgement that the projects are supported in part by the respective funding organisations under the framework of the JPI MYBL initiative. Moreover, Coordinators and/or Partners may be asked to present the results of their projects, at an intermediate and/or a final status seminar, during JPI MYBL events. Accordingly, travel expenses to attend these events should be included in the proposal budget plans.

## ANNEX I. FUNDING ORGANISATIONS CONTACT DETAILS

FUNDING ORGANISATION	COUNTRY	CONTACT DETAILS
<b>Federal Ministry of Science, Research and Economy (BMFWF)</b> and <b>Federal Ministry for Transport, Innovation and Technology (BMVIT)</b> (formal decision pending)	Austria	Austrian Research Promotion Agency (FFG)  Dr. Michalis Tzatzanis +43 5 7755 4405 michalis.tzatzanis@ffg.at  Mag. Stephanie Rammel +43 5 7755 4402 stephanie.rammel@ffg.at
<b>Research Foundation Flanders (FWO)</b>	Belgium	Olivier Boehme  Toon Monbaliu  Tel. +32 2 550 15 70 Email: eranet@fwo.be
<b>Fund for Scientific Research (FNRS)</b>	Belgium	Arnaud Goolaerts Email: arnaud.goolaerts@frs-fnrs.be
<b>The Canadian Institutes of Health Research (CIHR)</b>	Canada	Melody Sajedi Email: melody.sajedi@cihr-irsc.gc.ca Tel: 613-960-9475
<b>Academy of Finland (AKA)</b>	Finland	Sirpa Nuotio Email: sirpa.nuotio@aka.fi
<b>Federal Ministry of Education and Research (BMBF)</b>	Germany	Annette Angermann  VDI/VDE Innovation + Technik GmbH Project Management Agency of the BMBF, Berlin  Tel: +49 (0)30 310078 499 Email: annette.angermann@vdivde-it.de
<b>Ministry of Education, University and Research (MIUR)</b>	Italy	Gaia Brenna Email: gaia.brenna@miur.it Tel: +39 06 58497404
<b>Ministry of Economy, Industry and Competitiveness – State Agency for Research</b>	Spain	Jonas Radl, PhD.  Leonor Gómez Email: mybl@mineco.es  Tel: +34 916037269
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(ZonMw)**

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## ANNEX II. FUNDING ORGANISATIONS FUNDING COMMITMENT

PARTICIPATING FUNDING ORGANISATION	COUNTRY	TENTATIVE INITIAL FUNDING COMMITMENT (EUR)	ENVISAGED NUMBER OF PROJECTS POTENTIALLY FUNDED
<b>Federal Ministry of Science, Research and Economy (BMWFV)</b> (formal decision pending)	Austria	200 000	1-2
<b>Federal Ministry for Transport, Innovation and Technology (BMVIT)</b> (formal decision pending)	Austria	200 000	1-2
<b>Research Foundation Flanders (FWO)</b>	Belgium (Flanders)	200 000	6 to 7; top-up of max. € 30.000 per project
<b>Canadian Institutes of Health Research (CIHR)</b>	Canada	\$1,000,000 CAD	3
<b>Academy of Finland (AKA)</b>	Finland	500 000	2
<b>Federal Ministry of Education and Research (BMBF)</b>	Germany	1 000 000	Approx.. 3
<b>Ministry of Education, University and Research (MIUR)</b>	Italy	250 000	
<b>Ministry of Economy, Industry and Competitiveness – State Agency for Research</b>	Spain	300 000	3
<b>National Institute of Health Carlos III (ISCIII)</b>	Spain	150 000	1-2
<b>Forte, The Swedish Research Council for Health, Working Life and Welfare</b>	Sweden	600 000	
<b>Vinnova</b>	Sweden	600 000	
<b>The Netherlands Organisation for Research and Development (ZonMw)</b>	The Netherlands	500 000	2