EAPSPI Open Information Meeting Programme 2024

7 November 2024 in Paris

General Information

Date and Time: 07 November 2024, 14:00 – 17:10 CET

Meeting Agenda

Time	Topic
European Outlook on pensions	
14:00	**Welcome** Chairs of PPC and EAPSPI General Secretariat
14:10	**Discussion Update: Mechanisms of Progressive Retirement Across Europe** • Compilation of the various approaches in the EAPSPI members' countries (Input from the PPC task force) • Presentation of selected examples of country mechanisms (2-3)

14:45 EUROPEAN PENSION POLICY

- Legislative and supervisory activities (EIOPA, IORP 2, Capital Markets Union)

FOCUS: PENSION INFORMATION

15:05 COFFEE BREAK

15:15 CROSS-BORDER PENSION INFORMATION

- Representative of GIP Union retraite, Member of the ETS Association
- Discussion

16:00 ROBO-ADVISORS AND DIGITAL LITERACY

- CDC, etc.: Interactive voice response, call-bot, phone access to on-demand mailing

FOCUS: WORLD CAFE

16:10

- Cloud sovereignty in pension data
- Service levels in customer relations: use of AI / Robo-advisors
- Wrap-up of PPC work: Discussion on possible themes of interest – trends and future topics: open exchange

17:10 CLOSING / END OF OIM

FOCUS: EAPSPI ANNUAL GENERAL MEETING

17:15

- Program and supporting documents will be sent to EAPSPI members by direct email

18:15 CLOSING / END OF AGM

EAPSPI ANNUAL CONFERENCE PROGRAMME 2024

8 November 2024 in Paris

INFORMATIONS

SUBJECT: 'What do ESG commitments mean for public pensions?'

DATE AND TIME: Friday, 8 November 2024

In the face of ecological emergencies, which are themselves factors of social fragility, actors involved in transitions, in particular through their investments, can no longer ignore their responsibilities, especially in the public sphere. 20 years after the launch of the PRIs[1] and 10 years after the definition of the SDGs[2], where exactly does SRI[3] stand? Has it become normalised in Europe, given the Sustainability Regulations? More specifically, what are the concrete choices that can be made by public sector pension institutions to generate a positive impact on the economy, society and the environment in relation to "the pursuit of the public good and a social Europe"[4]?

[1] PRI: Principles for Responsible Investment – More on the initiative supported by the UN can be found here: https://www.unpri.org/about-us/about-the-pri

[2] SDG: Sustainable Development Goals – UN Initiative. More on the 17 goals: https://sdgs.un.org/goals

[3] SRI: Socially Responsible Investment. https://www.forbes.com/advisor/investing/sri-socially-responsible-investing/

[4] See EAPSPI's 2020 ESG Declaration https://www.eapspi.eu/Portals/0/Media/Dokumente/News/declaration_onepagers.pdf?ver=2021-06-14-113456-010

Interne

EAPSPI Annual Conference Programme 2024

8 November 2024 in Paris

Meeting Agenda

Time	Topic
08:30	Welcome / Arrival
09:00	Opening of the conference

- Welcome from Claudia Wegner-Wahnschaffe, Chair of EAPSPI
- Introduction by Marianne Kermoal-Berthomé, Director of Social Policies and Member of the Executive Committee- Caisse des dépôts, France

The ambitions of SRI in light of its results today

09:15 Retrospective

Retrospective by Florian Grandcolas, conference host and moderator

- The early days of SRI polarised between standards and choice, with the voluntary mobilisation of public pension plans for their asset management.
- Problematisation of the state of the debate.

09:30 A Brief History of Responsibility

Presentation by Blanche Segrestin and Kévin Levillain, Chair "Enterprise Theory", Mines ParisTech

- Corporate social responsibility, sustainability, challenges of transitions.

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09:45 **BENEFITS AND LIMITATIONS OF ESG INTEGRATION**

Round table:

- Myriam Métais, Director of Finance- Social Policies, Caisse des Dépôts, France
- Régis Pélissier, CEO- ERAFP, France
- Sandro Doudin, Head of Investment Strategy Development- VBL, Germany
- Dr. Philipp Mayer, Member of the Board - Valida Vorsorge Management, Austria (TBC)
- Johan Sjöström, Business Area Manager Individual & management support- KPA, Sweden

➢ Extra-financial analysis and rating, best-in-class, exclusions, engagement.

11:00 **BIODIVERSITY, A CROSS-CUTTING DIMENSION**

Statement by Marianne Louradour, President of CDC Biodiversity, France ~~(TBC)~~

11:30 **THE REGULATORY ISSUES OF SUSTAINABILITY TODAY**

Round table and exchange with the audience (discussion led by Noam Leandri, Associate researcher at ESSCA School of Management, author of La finance verte, published by La Découverte):

- Dora Blanchet, Head of unit "Sustainable finance"- ESMA, EU (TBC)
- Sandrine Ménard, Deputy Director of Business Financing and Financial Markets- ~~Christophe Bories, Head of Division of the~~ General Directorate of Treasury, France
- Anne-Catherine Husson-Traoré, Director of Publications- Novethic, France

12:30 **LUNCH-BUFFET "IMPACT"**

In "World Cafe" format with an impact area by culinary theme, around housing, biodiversity and CSR in the public sector

A NEW PHASE OF SRI AND CSR FOR THE PUBLIC SECTOR

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14:00 Values and ethics, a new frontier

Round table and exchange with the room:

- Eli Ane Lund, Secretary General of the NBIM Ethics Committee, Norway
- Jenny Gustafsson, Head of the AP Funds Ethics Committee, Sweden
- Vincent Kaufmann, CEO- Ethos Foundation, Switzerland

15:00 Stakeholders' words: what priorities for ESG in the years to come?

Dialogue:

- Nathalie Dogniez, President- Eurosif, EU
- Thierry Philipponnat, Chief Economist- Finance Watch, EU

15:30 Public investors for a social Europe

Round table and exchange with the room:

- Aurélie Baudhuin, Pilot of the working group "Social indicators and Taxonomy"- FIR, France
- Marcel Roy, Secretary General- European Association of Public Banks, EU
- ~~A representative from the French Sif~~
- ~~A representative from the European Group of Investors for a Social Investment Framework (TBC)~~
- A representative from LRIN – Investors' Network for Labour Rights (TBC)
  - Crucial issue of the "S"
  - How can the financial contribution to social progress be balanced?
  - Links between social rights and social democracy: role of the public sector

16:15 What are the responsibilities of public sector investors?

Interview with Amélie de Montchalin, Permanent Representative of France to the OECD

- In exchange with Sandrine Lemery, Chair of the Supervisory Board- FRR, France

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16:45 CONCLUSION OF THE CONFERENCE

- Summary of work by Philippe Soubirous, President of Préfon
- Closure by Éric Lombard, Director General of CDC

17:00 END OF CONFERENCE

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