



GENERAL INFORMATION

DATE AND TIME: 07 November 2024, 14:00 – 17:10 CET

MEETING AGENDA

TIME	TOPIC
<b>EUROPEAN OUTLOOK ON PENSIONS</b>	
14:00	<b>WELCOME</b> CHAIRS OF PPC AND EAPSPI GENERAL SECRETARIAT
14:10	<b>DISCUSSION UPDATE: MECHANISMS OF PROGRESSIVE RETIREMENT ACROSS EUROPE</b> <ul style="list-style-type: none"><li>• Compilation of the various approaches in the EAPSPI members’ countries (Input from the PPC task force)</li><li>• Presentation of selected examples of country mechanisms (2-3)</li></ul>

# EAPSPI OPEN INFORMATION MEETING PROGRAMME 2024

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7 November 2024 in Paris

## 14:45 EUROPEAN PENSION POLICY

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

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## FOCUS: PENSION INFORMATION

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### 15:05 COFFEE BREAK

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## 15:15 CROSS-BORDER PENSION INFORMATION

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

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## 16:00 ROBO-ADVISORS AND DIGITAL LITERACY

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

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## FOCUS: WORLD CAFE

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- 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

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## 17:10 CLOSING / END OF OIM

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## FOCUS: EAPSPI ANNUAL GENERAL MEETING

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- 17:15
- Program and supporting documents will be sent to EAPSPI members by direct email

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## 18:15 CLOSING / END OF AGM

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## 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<sup>1</sup> and 10 years after the definition of the SDGs<sup>2</sup>, where exactly does SRI<sup>3</sup> 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"<sup>4</sup>?*

<sup>1</sup> 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>

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

<sup>3</sup> SRI: Socially Responsible Investment. <https://www.forbes.com/advisor/investing/sri-socially-responsible-investing/>

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

## MEETING AGENDA

TIME	TOPIC
08:30	WELCOME / ARRIVAL

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### 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

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## THE AMBITIONS OF SRI IN LIGHT OF ITS RESULTS TODAY

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### 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.

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### 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.

# EAPSPI ANNUAL CONFERENCE PROGRAMME 2024

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8 November 2024 in Paris

## 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.

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

Statement by Marianne Louradour, President of CDC Biodiversity, France

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## 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):

- A representative of a supervision authority
- Sandrine Ménard, Deputy Director of Business Financing and Financial Markets- General Directorate of Treasury, France
- Anne-Catherine Husson-Traoré, Director of Publications- Novethic, France

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## 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, Executive Director of the Council on Ethics (Swedish National Pension Funds), Sweden
- Vincent Kaufmann, CEO- Ethos Foundation, Switzerland

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### 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

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### 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
- Rachel Hargreaves, Investor Engagement Advisor – Investors' Network for Labour Rights
  - 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

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### 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

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### 17:00 END OF CONFERENCE