

## CBBA-Europe Annual Conference

# Pan-European and cross border solutions: looking beyond the current EU turmoil

*27<sup>th</sup> November 2018, Hotel Leopold - Rue du Luxembourg 35, 1050 Brussels (EU Quarter)*

08:30-09:00	<b>Registration and welcome coffee</b>
09:00-09:10	<p style="text-align: center;"><b><u>OPENING</u></b></p> <p><b>Olga Ruf-Fiedler</b>, President of the Cross Border Benefits Alliance – Europe (CBBA-Europe) and Savings and Pensions Leader, The Dow Chemical Company</p>
09:10-09:40	<p style="text-align: center;"><b><u>IORP 2 AND CROSS BORDER PENSIONS: CHALLENGES AND OPPORTUNITIES</u></b></p> <p style="text-align: center;"><b>The new EU pension fund Directive and a revised “Budapest Protocol” should normally ease the creation and management of cross border occupational pensions. To what extent?</b></p> <ul style="list-style-type: none"> <li>• <b>Christian Lemaire</b>, Global Head of Amundi Retirement Solutions</li> <li>• <b>Michael Punzet</b>, ePension/eGroup, CEO</li> </ul> <p><u>Moderator:</u> <b>Jacqueline Lommen</b>, State Street Global Advisors, Senior Pensions Strategist</p>
09:40-10:50	<p style="text-align: center;"><b><u>EUROPE: QUO VADIS?</u></b></p> <p style="text-align: center;"><b>Brexit, populism, sovereignism and globalization: can we still wish a more integrated (social) Europe?</b></p> <ul style="list-style-type: none"> <li>• <b>Brando Benifei</b>, Member of the European Parliament, Committee of Employment and Social Affairs</li> <li>• <b>Phyllis Borzi</b>, Former Assistant Secretary of Labor, Employee Benefits Security Administration, U.S. Department of Labor (2009-2017) under the Obama Administration</li> <li>• <b>David Weeks</b>, Association of Member Nominated Trustees, UK, Chairman</li> <li>• <b>Nicolas J. Firzli</b>, The World Pensions Council (WPC), General Director</li> </ul> <p><u>Moderator:</u> <b>Liam Kennedy</b>, Investments and Pensions Europe (IPE)</p>
10:50-11:15	<b>Coffee break</b>
11:15-12:00	<p style="text-align: center;"><b><u>PENSIONS OF THE FUTURE: NEW DESIGN, NEW CONCEPT</u></b></p> <p style="text-align: center;"><b>According to several pension providers and experts, future pensions will significantly change in several aspects considering also the new societal and labor trends: How?</b></p> <ul style="list-style-type: none"> <li>• <b>Vital Schwander</b>, Head of innovation at SwissLife Global Solutions</li> <li>• <b>Marie Brière</b>, Head of Investor Research Center Amundi; Affiliate professor of Economics and Management, University Dauphine (Paris); Associate Researcher, Université Libre de Bruxelles</li> <li>• <b>Valdis Zagorskis</b>, European Commission, DG Employment, Social Affairs and Inclusion, Pensions Team Leader</li> </ul> <p><u>Moderator:</u> <b>Amaía Buján Otero</b>, General Manager of CBBA-Europe</p>
12:00-12:30	<p style="text-align: center;"><b><u>RISKS COVERAGE PROMISES AND GUARANTEES IN A CHANGED WORLD: THE INSURANCE PERSPECTIVE ON MODERN PENSIONS</u></b></p> <ul style="list-style-type: none"> <li>• <b>Ian Veitch</b>, Global Head of Corporate Life &amp; Pensions, Zurich</li> <li>• <b>Paolo Lippi</b>, Generali Employee Benefits Network, Head of Pensions Unit</li> </ul> <p><u>Moderator:</u> <b>Randy DeFrehn</b>, Former Director of the US National Coordinating Committee for Multiemployer Plans</p>
12:30-13:30	<b>Lunch break</b>

<p><b>13:30-14:40</b></p>	<p align="center"><b><u>WHY DOES THE EU NEED CROSS BORDER PENSIONS AT COMPANY AND SECTOR-WIDE LEVEL?</u></b></p> <p align="center"><b>A realistic analysis of the status quo, and a possible scenario of the coming needs</b></p> <p><u>Introductory speech:</u> <b>Carlo di Gennaro</b>, ENI (Italian Oil Company) Head of Global Group Pensions</p> <ul style="list-style-type: none"> <li>• <b>Slaven Misljencevic</b>, European Commission, responsible of the pan-European pension fund for researchers (RESAVER), DG Research</li> <li>• <b>Elodie Bodivit-Kan</b>, CFE-CGC AGRO, (the French Agri-Food Union), Director</li> <li>• <b>Aliya Wong</b>, US Chamber of Commerce, Executive Director of Retirement Policy</li> <li>• <b>Martino Braico</b>, Previnet, Senior Manager and Vice President of CBBA-Europe</li> </ul> <p><u>Moderator:</u> <b>Francesco Briganti</b>, Secretary General of CBBA-Europe</p>
<p><b>14:40-15:25</b></p>	<p align="center"><b><u>WHAT SHOULD BE STILL DONE TO CREATE AN “EUROPEAN (PRIVATE) PENSIONS UNION”?</u></b></p> <p align="center"><b>Several obstacles of normative, ideological, behavioral and political nature still need to be overcome to build up a real European (private) Pension Union</b></p> <ul style="list-style-type: none"> <li>• <b>Andy Agathangelou</b>, Transparency Task Force, CEO</li> <li>• <b>Emmy Verbist</b>, International Retirement &amp; Investment at Aon, Account Director</li> <li>• <b>Chiara Sandon</b>, European Assets Management Association (EFAMA), Senior Advisor</li> </ul> <p><u>Moderator:</u> <b>Theo Lutgendorff</b>, Global benefits, pensions and reinsurance executive, Aon, Account Director</p>
<p><b>15:25-15:50</b></p>	<p><b>Coffee break</b></p>
<p><b>15:50-16:45</b></p>	<p align="center"><b><u>LONG TERM INVESTORS COMBINING FINANCIAL GAINS FOR PENSIONS WITH COMMON PURPOSE</u></b></p> <p align="center"><b>Sustainable Finance and Economic Growth across of the Union: the potential “win-win” of asset gathering power of pan-European Pensions</b></p> <ul style="list-style-type: none"> <li>• <b>Marisol Hernandez</b>, Asset Owners, Alternatives Principles for Responsible Investment (PRI), Senior Manager</li> <li>• <b>Iuliia Shpak</b>, University of East London and Systematic Strategies Specialist, Sarasin &amp; Partners</li> <li>• <b>Jana Bour</b>, European Public Real Estate Association (EPRA), EU Policy Manager</li> </ul> <p><u>Moderator:</u> <b>Paulina Pielichata</b>, Pensions and Investments (P&amp;I)</p>
<p><b>16:45-17:00</b></p>	<p align="center"><b><u>CONCLUSIONS OF THE DAY</u></b></p> <p><b>Francesco Briganti</b>, Secretary General of CBBA-Europe</p>

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