



CBBA-Europe Annual Conference

Social protection and employee benefits in a changed World

Résidence Palace, 155 rue de la Loi, 1040 Brussels

Agenda September 15th: Pensions & Investments

09:15-09:40	Registration and welcome coffee
09:40-09:45	<p style="text-align: center;"><u>OPENING</u></p> <p>Olga Ruf-Fiedler, President of the Cross-Border Benefits Alliance – Europe (CBBA-Europe)</p>
09:45-10:45	<p style="text-align: center;"><u>THE REVISION OF THE IORP II DIRECTIVE: WHAT DID WORK, AND SHOULD BE IMPROVED (AND WHY)?</u></p> <p style="text-align: center;">The recent Call for Advice from the European Commission to the EIOPA raises discussions on the revision of the IORP II Directive</p> <p style="text-align: center;"><u>TOWARDS THE IORP 3 DIRECTIVE: THE CALL FOR ADVICE AND THE NEXT STEPS OF EIOPA</u></p> <p>Fausto Parente, Executive Director, the European Insurance and Occupational Pensions Authority (EIOPA)</p> <p style="text-align: center;"><u>Round table</u></p> <ul style="list-style-type: none"> • Matti Leppala, Secretary General at PensionsEurope • Fabian de Bilderling, President of the Actuaries' Belgian Association (IABE) • Nico Spiegel, Legal Officer, DG Financial Stability, Financial Services and Capital Markets Union, European Commission <p>Moderator: Francesco Briganti, Secretary General of CBBA-Europe and member of the OPSG at EIOPA</p>
10:45-11:35	<p style="text-align: center;"><u>THE COMPLEX PATH TO CROSS BORDER OCCUPATIONAL PENSIONS</u></p> <p style="text-align: center;">One of the declared aims of the European legislation is to ease the cross-border activities of pension funds. But did it really achieve this goal?</p> <ul style="list-style-type: none"> • Žiga Vižintin, Advisor at the Slovenian Pokojninska družba pension fund • Hans Van Meerten, Member of the OPSG at EIOPA, law professor, and lawyer at GMW law firm • Carl Gagnon, Assistant Vice-President, Global Financial Well-Being and Retirement Programs at Unum • Stanislav Dimitrov, Professor at the VUZF University in Sofia <p>Moderator: Karen De Paoli, Founder of Karing</p>
11:35-11:55	Coffee break
11:55-12:45	<p style="text-align: center;"><u>OCCUPATIONAL AND PERSONAL PENSIONS: TOWARDS HYBRID ARRANGEMENTS?</u></p> <p style="text-align: center;">Considering the entry into force of the PEPP Regulation, and the increasing shift of employment from typical to atypical jobs, to what extent will occupational and personal pensions interact and complement each other?</p> <ul style="list-style-type: none"> • Emmy Verbist, United Pensions and Partner at Aon International Wealth Solutions • Panayiotis Mavromichalis, Executive Director, European Markets at Emergo Wealth Ltd • Fabio Cicchinelli, International Pension Plans Coordination, Eni

	<ul style="list-style-type: none"> • Sjuck de Bordes, Director of International pensions, Owens Corning <p><u>Moderator</u>: Carlo Svaluto, Deputy editor, Investment and Pensions Europe (IPE)</p>
12:45-13:05	<p><u>INNOVATION IN THE PENSION FIELD FROM DIFFERENT PERSPECTIVES: TECHNOLOGY, NEW FORMS OF EMPLOYMENT, INTERNATIONAL MOBILITY: INTRODUCTION</u></p> <p>Technology, new way of working and mobility (including teleworking from different national jurisdictions) require adaptation from our pension and taxation and social systems.</p> <p><u>New solutions for international employment arrangements</u></p> <p>Vincent Hennequin, Regional Sales Director, Atlas</p>
13:05-14:00	Lunch break
14:00-14.40	<p><u>INNOVATION IN THE PENSION FIELD FROM DIFFERENT PERSPECTIVES: TECHNOLOGY, NEW FORMS OF EMPLOYMENT, INTERNATIONAL MOBILITY: DISCUSSION</u></p> <p>Round table:</p> <ul style="list-style-type: none"> • Denis Cabrillon, Business Accelerator Manager at Generali Employee Benefits (GEB) • David Powell, Principal, Groom Law Group • Martino Braico, Senior Manager of Previnet and Vice President of CBBA-Europe <p><u>Moderator</u>: Christian Lemaire, Member of the board at the cross-border Amundi pension fund and member of the OPSG at EIOPA</p>
14:40-15:20	<p><u>HOW TO RETHINK OUR PENSION SYSTEMS IN ORDER TO MAKE THEM MORE SUSTAINABLE AND ADEQUATE?</u></p> <ul style="list-style-type: none"> • Pierre Devolder, Professor of actuary sciences and statistics at the Catholic University of Louvain • Stephan Ryser, Head of customer and distribution management at Zurich Corporate Life & Pensions, Switzerland • Bernard Delbecque, Director for Economics and Research at the European Fund and Asset Management Association (EFAMA) and Chair of the OPSG of EIOPA <p><u>Moderator</u>: Sophie Baker, International News Editor at Pensions and Investments newspaper</p>
15:20-15:50	Coffee break
15.50-16.50	<p><u>SUSTAINABLE FINANCE, ALTERNATIVE AND ESG INVESTMENTS: IS IT ALL RIGHT THIS WAY?</u></p> <p>Sustainable Finance, the taxonomy EU Regulation, alternative and ESG investments today represent a real priority in the EU agenda. What are their potential and limits?</p> <p><u>How are investors shifting their investments portfolio in line with the new requirements and expectations from their clients?</u></p> <p>Marion O'Donnell, Director, Sustainable Investing, Fidelity</p> <p><u>Round Table: The potential virtuous synergy between investors and institutions and the new trends of institutional investors towards alternative and ESG</u></p> <ul style="list-style-type: none"> • Marion O'Donnell, Director, Sustainable Investing, Fidelity • Sergio Carfizzi, General Director of BCC Pension Fund of Cooperative Banks • Judith Vorbach, Member of the European Economic and Social Committee • Willem Pieter de Groen, Senior Research Fellow and Head of FMI Unit at Centre for European Policy Studies (CEPS) <p><u>Moderator</u>: Jana Bour, ESG Policy & Advocacy Manager at the European Public Real Estate Association (EPRA)</p>
16:50-17:00	<p><u>CONCLUSIONS OF THE DAY</u></p> <p>Francesco Briganti, Secretary General of CBBA-Europe</p>

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