



Research

aimed to highlight the value of good practices, help analyze and disseminate sustainable investments

2021 Eurosif Study

Aim: update methodologies in order to quantify the assets managed with SRI criteria in the European market
Activity: research and dissemination
in collaboration with Eurosif

[CLOSED CALL] Research: “The sustainable and responsible Investment policies of Italian pension schemes” (seventh edition)

Aim: carry on the survey of the investment strategies of Italian pension schemes
Activity: research and dissemination
in collaboration with Mefop and MondoInstitutional

[CLOSED CALL] Research: “The sustainable and responsible investment policies of Italian banking Foundations” (second edition)

Aim: carry on the survey of the investment strategies of Italian banking foundations
Activity: Research and dissemination
in collaboration with Acri and MondoInstitutional

[CLOSED CALL] Survey of retail investors: “Sustainable Finance in times of crisis: the perception of Italian retail investors”

Aim: deep-dive into the sustainable investment approach of Italian retail investors
Activity: Research and dissemination
in collaboration with BVA Doxa

[CLOSED CALL] Research on SMEs and sustainable finance

Aim: deep dive into the relation between SMEs and sustainable finance
Activity: Research and dissemination
in collaboration with ALTIS - Università Cattolica del Sacro Cuore

Call for
sponsorship
SRI Week

Working Group: “Engagement and Stewardship”

Aim: analyze the effects on the Italian market of the new regulatory framework (Shareholder Rights II) and identify stewardship principles
Activity: organize informative meetings
in collaboration with Mefop

“Cantieri ViceVersa” (third edition)

Aim: deep-dive into the sustainable finance instruments for the Third Sector
Activity: setting up of the working group, research and dissemination
in collaboration with the National Third Sector Forum

Working group: “Aligning the investments to the European taxonomy for sustainable activities”

Aim: give Members the opportunity to discuss and delve into the European taxonomy in order to set guidelines for investors on how to use this instrument
Activity: setting up of the working group, research and dissemination



New 2021



Projects

in order to inform and raise the awareness of the financial community, media and citizens about SRI finance themes through communication initiatives, meetings, seminars, educational activities and cultural events



FFS members joint engagement campaign

Aim: give FFS members the opportunity to discuss and exchange experiences on engagement actions with investee companies

Activity: initiate joint engagement activities (possible themes - environment: climate change and circular economy; social: diversity and gender gap)

2021 Sustainable and Responsible Investment (SRI) Week - (tenth edition)

Animation of the "Italian Academy for Sustainable Finance"

Goal: help develop the permanent network of Universities and Italian Research Centers initiated by FFS in 2015 and hold at least one public meeting involving the network's faculty

Update of the Transparency Code and of the SRI Products section of the Investi Responsabilmente portal

in collaboration with Eurosif

Participation at the 2021 Asset Management Conference and Exhibition (Salone del Risparmio)

Participation in the Activities promoted by ASviS

Participation in the "Finance for Sustainable Development" Working Group, in the drawing up of the "Italy and Sustainable Development Goals" Report and in the fifth edition of the Sustainable Development Festival.

Collaborative effort in view of organizing the CSR Conference and Exhibition (Salone CSR)

COMMUNICATION ACTIVITIES

Content management of the sustainable finance section of the Italian Stock Exchange website

Activity: FFS to produce original contents for the "Sustainable Finance" section of www.borsaitaliana.it

Writing of contributions for online newspapers and newsletters

FFS contributes to the Eurosif and Prometeia ("Anteo") newsletters.

FFS collaborates with Valori.it and with Advisor Professional, the business community of Advisor Online (reserved for financial advisors); in addition, FFS is responsible for a biweekly column on sustainable finance for the Radiocor - Il Sole 24 Ore Agency. Besides, FFS collaborates in specific publishing activities on Members' proposal.

Weekly press review

Management of Twitter, Linked-in and Facebook profiles

Internal communication service "News from the network" (Notizie dalla Rete)

Website restyling and renovation



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EDUCATIONAL ACTIVITIES

Educational activities for Members

Meeting with journalists

Teaching as part of other organizations' courses

in collaboration with ALTIS - Università Cattolica (Sustainable Finance Master Course), Bologna Business School, Utilitalia, Job Farm, Ventitrenta and other Universities / educational organizations

SUSTAINABILITY-ORIENTED FINANCIAL EDUCATION

Enhancement of the Investi Responsabilmente portal

"Sustainable Finance Pills" Development of educational video clips
Development of infographics

Development of a video on sustainable finance with a public event held to launch it on the occasion of the Month of Financial Education – theme to be determined

in collaboration with Taxi 1729

Cultural show "Sostenibilità ad Arte" (seventh edition)

in collaboration with Associazione Hendel

EUROPEAN AND INTERNATIONAL ACTIVITIES

Participation in Eurosif Activities

Italian Coordination - International Network of Financial Centers for Sustainability (FC4S)

Contribution to G20

European projects and tender

In progress:

PadovaFIT! Expanded, a project for the energy requalification of homes financed by the European framework program Horizon 2020 for research and innovation
in collaboration with the Municipality of Padua

NEON (Next-Generation Integrated Energy Services fOr Citizen Energy CommuNities)
in collaboration with ENGIE



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THEMATIC MEETINGS

SRI Breakfast / SRI Aperitifs / Seminars

online

8 meetings in 2021

Possible themes:

Sustainable finance and nutrition

in collaboration with Access to Nutrition

Sustainable investments in healthcare / social infrastructures

Finance and social mobility

Finance and inequalities: which role can responsible investments play?

Sustainable finance and enhancement of gender diversity

Sustainable finance, technological innovation and social inclusion (e.g. narrowing the digital divide)

Sustainable finance and countering organized crime

Sustainable finance and the blue economy

Sustainable investments in infrastructures

ESG-linked financial instruments

Integration of ESG criteria in creditworthiness analyses

The role of proxy advisors as part of sustainability engagement: the engagement chain

Call for
sponsorship
[CLOSED]



Relations with institutions and positioning of FFS

collaboration, advocacy and policy initiatives with Italian and European institutions aimed to support the implementation of a regulatory framework that encourages sustainable investments

Relations with the Italian Parliament and the Italian Government (meetings with those Ministries that are key for sustainable finance)

Periodical meetings with supervisory authorities (two per year with each entity)

IVASS, COVIP, Bank of Italy, CONSOB

Strengthening FFS' international positioning

within Europe (Parliament, Commission - DG FISMA) and internationally (UN Agencies, FC4S, relations with non-European SIFs)

Monitoring of - and disclosure to members on - public consultations

in respect of European and Italian legislative initiatives (Action Plan, Regulations Proposals, etc.) and information on how to participate

DISCLAIMER:

the plan of activities was presented and discussed during the the Board of Directors on December 9, 2020 and the meeting of the members on December 14, 2020. The document may be updated or modified in the first months of 2021.



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