



Research

aimed at highlighting the value of good practices and helping analyse and disseminate sustainable investments

2022 Eurosif Study

Aim: analyze the European SRI market
Activity: research and dissemination
in collaboration with Eurosif

Research: “The sustainable and responsible investment policies of Italian pension schemes” (eighth edition)

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

Research: “The sustainable and responsible investment policies of Italian banking Foundations” (third edition)

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

Research: “Insurance companies and sustainable finance” New 2022

Aim: deep-dive into the integration of ESG criteria both into the investment policies and into underwriting products/ services of insurance companies
Activity: research and dissemination
in collaboration with ANIA and IVASS

Survey on retail investors – theme to be defined

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

Research on SMEs and sustainable finance – possible theme: deep-dive into the sectors included in the European taxonomy for sustainable activities

Aim: deep-dive into the relation between SMEs and sustainable finance
Activity: research and dissemination
in collaboration with Ventitrenta and a specialised research center (to be identified)

“Cantieri ViceVersa” (fourth edition)

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

Working group: “Systemic strategies against greenwashing” New 2022

Aim: give ItaSIF members the opportunity to discuss and delve into the green and social washing problem in order to produce a paper with guidelines for both institutional and retail investors
Activity: setting up of the working group, research and dissemination

Research: “Just transition: the role of sustainable finance” (two-years project) New 2022

Aim: deep-dive into the theme of ecological transition and related social and environmental cost/benefit
Activity: research and dissemination

Call for
sponsorship
Settimana SRI



Projects

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

Working Group: Collaborative engagement

Aim: give members the opportunity to discuss and share common goals regarding engagement actions with investees

Activity: initiate joint engagement initiatives

Working Group: Insurance companies New 2022

Aim: give ItaSIF member insurance companies the opportunity to discuss and share sustainability issues

Activity: setting up of the working group and organisation of periodic meetings

Sustainability bond for local development

Aim: carry on the analysis of the theme, launched in 2021 in collaboration with ART-ER and some Italian regions

Activity: research and dissemination

2022 Sustainable and Responsible Investment (SRI) Week (eleventh edition)

Animation of the "Italian Academy for Sustainable Finance"

Aim: 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 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 sixth edition of the Sustainable Development Festival

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

COMMUNICATION ACTIVITIES

Articles for major Italian newspaper

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

Articles for online newspapers and newsletters

ItaSIF contributes to the Eurosif and Prometeia ("Anteo") newsletters, as well as to financial education projects of EfpA. ItaSIF collaborates with several specialised magazines, as ESG Business Review, Fundspeople and Valori.it, and is responsible for a biweekly column on sustainable finance for Radiocor – Il Sole 24 Ore Agency. Finally, ItaSIF collaborates with the magazine MondoInstitutional.

Weekly press review on sustainable finance

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

Management of Twitter, LinkedIn and Facebook profiles

Realization of the new ItaSIF brochure



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EDUCATIONAL ACTIVITIES

Training initiatives for journalists on sustainable finance

Meeting dedicated to journalists members of the National Association of Journalists, as part of their continuing professional training.

Development of a media kit for journalists about sustainable finance and ItaSIF.

Teaching in the framework of other organizations' courses

in collaboration with the German SIF (FNG), ALTIS Università Cattolica, Bologna Business School, Il Sole 24 Ore, H-Farm College, Politecnico di Milano and other Universities / educational organizations

SUSTAINABILITY-ORIENTED FINANCIAL EDUCATION

Enhancement of the Investi Responsabilmente portal

Development of short podcasts

Development of infographics

Development of a video on sustainable finance to be launched within a public event during the Month of Financial Education – theme to be defined

in collaboration with Taxi1729

Cultural show “Sostenibilità ad arte” (eighth edition)

in collaboration with Associazione Hendel

EUROPEAN AND INTERNATIONAL ACTIVITIES

Participation in Eurosif activities

Promotion of ESGeneration Italy

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

Participation at COP27

organisation of a side-event, as for COP26

European projects and tender

In progress:

PadovaFIT Expanded, 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

Submitted:

ECOSTARHub (European network on innovation and financing for nature-based solutions)

in collaboration with Etifor



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THEMATIC MEETINGS

SRI webinar

8 meetings in 2022

Possible themes:

Sustainable finance and agrifood

Sustainable finance and digital transition (environmental impact, inland areas and digital divide)

A global taxonomy? Sustainable investments in emerging areas

Sustainable finance and circular economy

Sustainable investing in real estate

Sustainable finance and responsible taxation

Finance and sustainable mobility

Sustainable finance and data privacy

Sustainable finance and governance

Sustainable finance and healthcare

Sustainable finance for gender equality: tackling gender pay gap

Sustainable finance and minorities

Sustainable finance and ESG assessment tools (data, ESG ratings, sustainability indexes)

Sustainable finance and public investments

Integration of ESG criteria into bank stress tests

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Relations with institutions and positioning of FFS

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

Relations with the Italian Government, the Italian Ministry of Economy and Finance (MEF), the Italian Ministry of Infrastructure and Sustainable Mobility (MIMS) and the Italian Ministry of Ecological Transition (MITE)

Relations with Italian Parliament Members on specific themes

Periodical meetings with supervisory authorities

IVASS, COVIP, Banca d'Italia, CONSOB

Strengthening ItaSIF's international positioning

within Europe (Parliament, Commission - DG FISMA, DG GROW) and internationally (UN Agencies, FC4S, relations with non-European SIFs) and bilateral (e.g. Italy-France)

Monitoring of public consultations and communication to members

Regarding European and Italian legislative initiatives and terms of participation

Monitoring of European regulations' application and its impact on SRI industry

Organisation of periodical update meetings for ItaSIF members

DISCLAIMER:

The Action Plan has been approved by ItaSIF members on December 15, 2021; it may be updated in early 2022.



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