



## Research

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

### 2022/2023 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) [CALL CLOSED]

**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) [CALL CLOSED]

**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 [CALL CLOSED]

**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

Call for  
sponsorship  
SRI Weeks

### Survey on retail investors – Energy transition [CALL CLOSED]

**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 [ONGOING CALL]

**Aim:** deep-dive into the relation between SMEs and sustainable finance  
**Activity:** research and dissemination  
in collaboration with Cerved Group

### “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

### 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



## 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: “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

### 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) Weeks (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

### Newsletter “Il Forum informa”

### 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:

FOCO (Fostering Energy Communities in Southern Europe)

in collaboration with CRIEP



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### THEMATIC MEETINGS

#### SRI webinar

9 meetings in 2022

Selected themes:

Sustainable finance for gender equality: tackling gender pay gap

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

Sustainable finance and responsible taxation

Sustainable finance and circular economy

Sustainable finance and agrifood

Sustainable finance and data privacy

Sustainable finance and public investments

Finance and sustainable mobility

A global taxonomy? Sustainable investments in emerging areas

#### Series of webinar

Online events

3 webinars organised during the SRI Weeks. Possible themes:

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

Sustainable investments in real estate

Sustainable finance and governance

Sustainable finance and healthcare

Sustainable finance and ethnic minorities

ESG integration in banks stress-tests

Call for  
sponsorship  
[CLOSED]

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sponsorship  
SRI Weeks  
[CLOSED]



## Policy

policy and advocacy initiatives towards 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, ESGeneration, FC4S, relations with non-European SIFs) and bilateral (e.g. Italy-France; Italy-UK)

**Monitoring of public consultations and communication to members**

Regarding European and Italian legislative initiatives and terms of participation

**Half an hour of sustainable finance. The monthly policy update for Members**

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

New 2022

DISCLAIMER:

The Action Plan has been approved by ItaSIF members on December 15, 2021. Updated to June, 20th 2022.



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