



Research

aimed at highlighting the value of good practices and helping analyse and disseminate sustainability know how and further sustainable investments

Call for
Sponsorship
SRI Weeks

Research: “The sustainable investments of the Italian pension schemes” (ninth edition)

Aim: continue the survey regarding the inclusion of ESG criteria in the investment strategies of Italian pension schemes

Activity: research and dissemination
in collaboration with Mefop and MondoInstitutional

Research: “The sustainable investments of the Italian banking Foundations” (fourth edition)

Aim: continue the survey regarding the inclusion of ESG criteria in the investment strategies of Italian banking Foundations

Activity: research and dissemination
in collaboration with Acri and MondoInstitutional

Research: “Sustainability in the Italian insurance industry” (second edition)

Aim: continue the survey regarding the inclusion of ESG criteria both in the investment strategies and in the underwriting practices of the Italian insurance companies

Activity: research and dissemination
Executed by FFS-ANIA

Survey on retail investors – theme to be defined

Aim: analyse the sustainable investment approach of Italian retail investors highlighting a specific topic to be defined

Activity: research and dissemination
in collaboration with BVA Doxa

Research on SMEs and sustainable finance – theme to be defined

Aim: analyse the relation between SMEs, sustainability and sustainable finance highlighting a specific topic to be defined

Activity: research and dissemination



Projects

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

“Cantieri ViceVersa” (fifth edition)

Aim: deep-dive into the sustainable finance tools for the non-profit sector

Activity: setting up of the working group, Summer School and events in collaboration with National Third Sector Forum

Working Group: “Sustainable finance at a turning point: opportunities and challenges”

Aim: give ItaSIF members the opportunity to discuss and delve into the challenges that sustainable finance is facing, in order to produce a paper with guidelines for investors

Activity: setting up of the working group, research and dissemination

Working Group: collaborative engagement

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

Activity: go ahead with the work begun (common database on outcomes) and initiate new joint engagement initiatives

2023 Sustainable and Responsible Investment (SRI) Weeks

12th edition – November 14-28, 2023

Promotion of the network “Italian Academy for Sustainable Finance”

Aim: help develop the permanent network of Universities and Italian Research Centers initiated by FFS in 2015 and organise at least one public event; creation of a section on FFS website dedicated to the initiative

Participation in the 2023 edition of the Asset Management Conference and Exhibition (Salone del Risparmio)

Participation in the 2023 edition of Ecomondo

Participation in the activities promoted by ASviS

Participation in the “Finance for Sustainable Development” Working Group, in the “Italy and Sustainable Development Goals” Report and in the seventh edition of the Sustainable Development Festival

Co-organisation of the CSR Conference and Exhibition (Salone CSR 2023)

COMMUNICATION ACTIVITIES

Articles for major Italian newspaper

Content management of the “Sustainable finance/Policy” section of the Italian Stock Exchange website

Articles for online newspapers and newsletters

ItaSIF contributes to the Eurosif and Prometeia (“Anteo”) newsletters. ItaSIF also regularly provides financial education content to Eipa and regularly sends contributions to numerous newspapers, both specialised and general

Weekly press review on sustainable finance for ItaSIF members

Monthly Newsletter “Il Forum informa. News dal mondo della finanza sostenibile”

Management of Twitter, LinkedIn and Facebook profiles

Training initiative for journalists

Projects

EDUCATIONAL ACTIVITIES

Teaching in the framework of other organisations' courses

in collaboration with: ALTIS Università Cattolica, Bologna Business School, 24 Ore Business School, Politecnico di Milano and other Universities/educational organisations

SUSTAINABILITY-ORIENTED FINANCIAL EDUCATION

Promotion of the Investi Responsabilmente website

Publication of infographics

Organisation of an event on sustainable finance during the Month of Financial Education – theme to be defined

in collaboration with Taxi1729

Festival "Sostenibilità ad arte" (ninth edition)

in collaboration with Associazione Hendel

Realization of two short videos of financial education dedicated to retail investors on the issues of engagement and MiFID II

within the EURENI project

Organisation of an event dedicated to financial consultants

within the EURENI project

EUROPEAN AND INTERNATIONAL ACTIVITIES

Participation in Eurosif activities

Promotion of ESGeneration Italy

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

Participation in COP28

organization of a side-event

European projects

In progress:

NEON (Next-Generation Integrated Energy Services fOr Citizen Energy CommuNities)

EURENI (European Environment Initiative)

financial education project in collaboration with FNG

Submitted:

Climate Fit

Leader World Climate Foundation

TRANSPARENCY

Leader Crip

Projects

THEMATIC MEETINGS

SRI webinar (1 sponsor for each webinar)

Online events

8 webinars in 2023, between February and October

Possible themes:

Sustainable climate investments in the agri-food sector

Sustainable investments in real estate

Sustainable finance, sustainable mobility and public transport

Beyond GDP in Member States' assessment: comparison of different methodologies

Sustainable finance and health

Sustainable finance and diversity

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

Sustainable investments in private markets

Sustainable finance and public investment

The inclusion of ESG criteria in Bank Stress Tests

The inclusion of ESG criteria in credit analysis

Sustainable passive investments: opportunities and challenges

Inclusion of ESG criteria in proxy voting

Sustainability and fintech

Sustainable finance and human rights

Sustainable investments along the entire value chain: ESG risk analysis and mitigation

The G in ESG: remuneration and sustainability policies

Call for
sponsorship
[CLOSED]

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SRI Weeks

3 webinars to be organised during the SRI Weeks (3 sponsors for each webinar)
– themes to be defined

Online events



Policy

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

Collaboration with the Italian Government, the Italian Ministry of Economy and Finance (MEF), the Italian Ministry of Transport (MIT) and the Italian Ministry of Environment and Energy Security (MATTEM)

Collaboration with Italian Parliament 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)

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 ItaSIF Members

Monitoring of European legal framework and its impact on SRI industry

Analysis of the application of European legal framework and its impact on operations

and organization of meetings for ItaSIF members

DISCLAIMER:

The Action Plan has been approved by ItaSIF members on December 16, 2022, and could be modify in the first months of 2023.



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