

# AEIP | Activity Report 2012

European Association of Paritarian Institutions of Social Protection



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## Foreword President



Peter Huber

Ladies and Gentlemen,

At the end of my mandate as President of AEIP, I would like to present some projects and initiatives we have implemented over the two-year of my presidency.

In 2011, we celebrated the 15th anniversary of AEIP. We realized that AEIP since its creation has considerably grown in Membership and duties. AEIP became an institution well known and recognized throughout Europe.

To allow AEIP exercising its responsibilities and ensure a high level in the future, we have tested its structures, procedures and organization.

We decided in 2012 to revise the vision and mission of AEIP for the next decade.

I am glad that the changes made in 2012 were supported and approved by all members.

The History of the Association, its Statutes, Internal Rules and the Tasks of its Scientific Council, as well as the above mentioned Vision & Mission, are collected in one Handbook which will be very useful not only for the members, but also to all those Organizations that might be interested to join AEIP.

Another outcome coming from my Presidency is the first Japan-Europe-American Conference on Healthcare and Long Term Care. This event will be held on the 18-19 and 20 September 2013 in Paris representing the follow-up of our study trip in Japan 2012.

Our Association is open to new collaborations and partnerships in accordance with the challenges that our systems of social protection have to face in the next future.

I would like to thank all the members, the team of AEIP and in particular its Secretary General, Bruno Gabellieri, and its Director, Francesco Briganti, with whom I've worked side by side.

### ON THE SIDE OF THE EXTERNAL RELATIONS OF AEIP, TWO IMPORTANT ACTIONS WERE TAKEN

- A further enlargement of the Scientific Council of AEIP to the Universities of Montpellier (France) and Heidelberg (Germany). We have been able to create, also with the support of Professor Coursier of Montpellier, a tripartite protocol.
- A new protocol of cooperation was signed in June 2013 in Boston during the last Transatlantic Conference. AEIP, together with PensionsEurope, the American ABC, NCCMP and the Canadian MEBCO have set up the "Global Pension Alliance". This network has the aim of coordinating the lobbying actions of the members Organizations in their respective continents in order to be stronger and more influential in defending their members on subjects of common interest.

Mr. Peter Huber  
President

## Foreword Secretary General



Bruno Gabellieri

In 2012 AEIP had a very full agenda of activities. Wide discussions about the reform of the pension funds' directive (IORPs) continued with its members, the European Institutions, the European Insurance and Occupational Pensions Authority (EIOPA), other lobbying organizations and the media. As for this topic, I can say that our lobbying campaigns proved that we are on the good path. Of course, we are aware that our campaigns shall continue in order to protect our members from the risks of a wrong legislation that could seriously undermine them.

I am also proud to affirm that this year AEIP re-launched its activities on healthcare. Indeed, our Association was accepted as a collaborating partner of the Joint Action on Health Workforce led by the European Commission and the Members States of the EU; in particular, AEIP joined two work packages of that action, whose purpose is to identify and face the challenge of health workforce shortages. This year AEIP also drafted a Reflection Paper on Long Term Care, and it held a high level panel on healthcare and long term issues during its joint Transatlantic Conference of June 2012. This panel included speakers of the OECD, EU Commission and top officials of the US Government.

This year AEIP lobbying also focused on the ongoing works for the creation of a new Directive related to the posting of workers in Europe (Enforcement Directive). Such an initiative represents a prior lobbying issue for AEIP, not only because it would affect many AEIP paritarian members dealing with paid holidays; but also because it could even put into question the main values of the European social model for the advantage of the mere business approach. For that occasion, AEIP developed many new contacts and relations with the European Parliament.

The cooperation with the Presidencies of the European Union was fruitful this year, too. Indeed, AEIP was officially invited by the Cypriot Presidency of the European Union to join

its closing conference of the European Year of Active Ageing and Solidarity between Generations, by taking a seat as official promoter of that Year.

In addition, AEIP was again accepted by the European Agency of Health and Safety (OSHA) as official partner in its campaign "Healthy Workplaces Campaign 2012-2013 on Working together for risk prevention".

This year AEIP set up a new working group aimed at supervising the current and potential role of paritarian institutions in employment policies. The first meeting held in 2012 was a great success, and several organizations took part to it, including representatives of the International Labor Organization (ILO), the European Foundation for the Improvement of Living and Working Conditions (Eurofound), the aforementioned OSHA and other major EU and national stakeholders involved in that field of activity.

Finally, despite the current economic and financial crisis, AEIP had a further improvement with its members: the Italian CNCE (Paid Holidays Paritarian Fund) raised their association's membership status from Observer Member to Associate Member and some others organizations are thinking about a possible membership within our Association.

With these perspectives we are confident in the future.

A handwritten signature in blue ink, appearing to read 'Gabellieri', with a long horizontal stroke extending to the right.

Mr. Bruno Gabellieri  
Secrétaire Général

# 1 | European Coordinated Retirement Schemes

## Commission I

Commission I works on EU Coordinated Retirement Schemes in the first pillar of social protection. In addition to the traditional social security public schemes, it includes both statutory pension schemes managed by the social partners and pension schemes which are set up by collective bargaining agreements and work on a paritarian basis.

These schemes can work on a pay-as-you-go, funded or mixed basis, and fall under the EU coordination rules of social security, EU Regulation 883/04. In Commission I, AEIP monitors all legislation passed for the first pillar, the evolution of the EU Coordination of Social Security Pension Schemes and it analyses the new challenges and current pitfalls within the first pillar.

### RELEVANT DOSSIERS TREATED IN 2012

#### Recent developments in the EU coordination of social security systems

The review of the scope of Regulation 883/04 has been identified as one of the policy actions contained in the EC White Paper on Pensions published in February 2012. Pension institutions falling under the scope of this regulation are considered as social security of a given Member State. This represents a unique feature for AEIP Commission I members. Indeed, a review of the scope of this regulation might interfere with the very nature and functioning of occupational pensions which are traditionally considered as “first-pillar-bis” pensions.

During 2012, Commission I has thoroughly discussed the possible risk and opportunities linked to the review of the Regulation 883/04 and assessed the outcomes of a study commissioned by the European Commission to the European Social Observatory on this topic.

#### Discussions on the Latest trends on the sustainability of Pension Systems in Europe

In spring 2012 the European Commission issued the updated edition of the Ageing Report. This has been the object of Commission I discussions on the sustainability and adequacy of the different European pension systems.

#### Discussion on the new system of coordinated economic governance and potential impact on the principle of subsidiarity

The financial crisis and its evolution into an economic and sovereign debt crisis have led the EU to further improve its economic governance, in particular within the Euro area, with a closer coordination of the national economic policies. The “Six Pack” and the “Two Pack” do represent significant steps towards more coordinated economic governance.





AEIP General Assembly, Paris (France) 29th June 2012.

While the aim of these initiatives responds to a clear macroeconomic need, it appears that the closer involvement of the European dimension into the national discussion over sustainability of public finances might affect the exclusive national competence over social security and pension policy. In this sense, AEIP Commission I has analysed the potential risks stemming from the recommendations issued by the European Commission within the framework of the “European Semester” process.

### Discussion on the national pension reforms

The sovereign debt crisis, together with a worsening demographic outlook has pushed several European countries to reform their national pension systems.

In particular, within this context, AEIP members have analysed the pension reforms put in place by some Member States, such as Italy, the Netherlands and Belgium. The group has also assessed the unique features of the Finnish pension system and the recent developments of the French dialogue between social partners on the reforms of the AGIRC-ARRCO regimes.

## 2 | Occupational Pensions

### COMMISSION II and Solvency Working Group

Commission II encompasses all issues surrounding paritarian occupational retirement provision and the related Directive on Institutions for Occupational Retirement Provision (IORP).

This Commission is devoted to find ways, by which the occupational pensions could allow for better retirement provision with a special focus on the specific problems resulting from hazardous or arduous work and a greater mobility of workers while not endangering existing and well-functioning IORPs, provides recommendations to European Institutions concerning the review of the IORP Directive, studies about investment strategies and governance issues and works on identifying the impact of a potentially harmonised prudential framework at European level.

2012 was a key year for occupational pensions in Europe. The review of the IORP Directive required a lot of resources both from the EU Institutions and stakeholders. In January 2012, AEIP, through its Solvency Working Group responded to the 2nd consultation of the EIOPA concerning the European Commissions' Call for Advice (CfA) on the Review of the IORP Directive. The delivered response comprised answers to the questions that ranged from legal to financial, actuarial and governance aspects of Institutions for Occupational Retirement Provisions (IORPs).

#### RELEVANT DOSSIERS TREATED IN 2012

##### Response to the 2011 Second Consultation on the EC Call for Advice to the EIOPA and press release

At the beginning of 2012 AEIP delivered a response to the second part of the Stakeholder Consultation on the EC Call for Advice on the Review of the IORP Directive to EIOPA. The document involved more than 90 answers ranging from the elements of the new Holistic Balance Sheet<sup>1</sup> to innovative aspects of governance, communication, information and transparency. The joint answer of AEIP was the outcome of several internal meetings and agreed upon by all AEIP Members.

A press release was issued jointly with the response and sent to the AEIP stakeholders and media (i.e. IPE and European Pensions).

##### Response to the EIOPA Consultation on the Technical Specification of the Quantitative Impact Study (QIS) of the IORP II

In July 2012 AEIP and its members engaged with a highly technical exercise: the EIOPA Consultation on the IORP II Quantitative Impact Study (QIS) draft technical specifications. The aim of the consultation was to let the stakeholders provide their opinion on the methodology to be used in the first IORP II QIS. AEIP, through its Solvency Working Group, analysed the text and delivered a thorough response, highlighting the main doubts and biases embedded in the proposed methodology.

##### Position Paper on the IORP II QIS weaknesses and biases

In autumn 2012, 8 European countries participated in the IORP II QIS. This proved to be a great challenge for the participating pension funds and many drawbacks and doubts emerged during the process. Indeed, many concepts, i.e. the sponsor support valuation, were far from being finalised in the technical specifications used for this first QIS. Fur-

<sup>1</sup> The Holistic Balance Sheet is a tool developed by EIOPA, designed for assessing the solvency requirements of IORPs while valuating their steering mechanisms and the various pension protection schemes existing in the different European countries.



thermore, the short timing and process were difficult to handle for all participating parties. AEIP Members decided to deliver a position paper focussed on the main methodological biases encountered in the calculations of its members. The position paper on the IORP II QIS was agreed upon and discussed first in December 2012 and eventually finalised and published in early 2013.

#### **Group of 8: the different joint statements and the impact on the media**

The IORP Directive has received the attention of several stakeholders in Europe. Indeed, in 2012 AEIP worked closely with the European Social Partners (BUSINESSEUROPE, ETUC, CEEP and UEAPME) and other European organisations (PensionsEurope, EFAMA and EVCA) within the so-called "Group of 8".

The Group released several joint press releases and positions throughout 2012. The first statement was issued on March 1st, the day of the EC Public Hearing on the Review of the IORP Directive, and eventually commented by the Financial Times, IPE and others.

The second statement, which asked for a rethinking of the IORP Directive review, was sent in July 2012 to the Chairman of EIOPA, Mr Gabriel Bernardino.

The third statement, which focussed on the QIS, asked the European authorities for a truly political debate on the review of the IORP Directive.

#### **Monitoring of the restart of discussions on the "Portability" Directive**

Among the 20 policy initiatives of the White Paper, one that is already in pipeline and might have a strong impact on pension funds is the directive on the acquisition and preservation of supplementary pension rights (the former so-called "portability" directive).

The European Commission proposed a directive in 2005 and a revised version in 2007, but the Council did not ever find a common position on it (unanimity was required at that time).

With the White Paper on Pensions, the portability of supplementary pension rights has been reconsidered by the European institutions as a way to enhance labour mobility inside the EU and thus as one of the key measures to foster growth.

Drawing on this, the Cyprus Presidency restarted the debate inside the Council in autumn 2012.

#### **Creation of a paritarian IT pension scheme in Austria – Cross Border aspects**

AEIP favours cross border management of paritarian pension schemes. In 2012, an Austrian brand new occupational pension schemes, created in the framework of a collective agreement for the workers of the IT industry, established cross border arrangements for the management of its assets. AEIP supported the social partners in analysing the problems and issues encountered in setting up such arrangements, both at technical

and European level. Advocacy activities were carried out with the European Parliament and the European Commission (DG Markt) in order to remove obstacles to this activity.

### **CONFERENCE AND EVENTS**

#### **Public Hearing on the review of the IORP Directive**

The Secretary General of AEIP was invited as speaker on March 1st 2012 at the European Commission's Public Hearing on the Review of the IORP Directive. Mr Gabellieri gave a speech within the panel dedicated to the governance and transparency of pension funds. He tackled the different aspects of good governance, i.e. the ability to provide the ability of board members to provide adequate, sustainable and safe pensions, and focussed on the main advantages of the paritarian management model, such as the potential to provide inter and intra-generational solidarity.

#### **OPSG meetings at EIOPA**

The Secretary General of AEIP is Member of the EIOPA's Occupational Pensions Stakeholder Group (OPSG). Throughout 2012, Mr Gabellieri attended several meetings of the OPSG in Frankfurt and participated to the drafting and assessment of the different statements released by the OPSG on a number of topics, i.e. the White Paper on Pensions, the harmonisation of quantitative requirements of IORPs, and the information for members of occupational pension plans.



### 3 | Joint initiatives of COMMISSION I and II

On February 17th 2012, the European Commission published its long-awaited White Paper on Pensions, entitled “An agenda for sustainable, safe and adequate pensions”. The document outlines a challenging scenario for the sustainability of the pension systems in Europe, and enlists 20 policy initiatives addressing both the statutory as well as occupational pensions.

#### **AEIP press release and position paper**

AEIP Commission I and Commission II have jointly worked on the document and welcomed the holistic approach adopted by the European Commission (EC) towards such a sensitive and complex topic, which indeed touches upon macroeconomic and demographic balances, living and employment conditions throughout Europe.

Most of all, within its position paper released in June 2012, AEIP welcomed the recognition of the important role of Social Partners with regard to the pension policy of Member States, notably as for their involvement in sensitive issues such as retirement age and in setting up 2nd pillar retirement schemes.

#### **Preparatory activity on amendments to be sent to the EMPL and ECON Committee**

As the preceding Green Paper, the release of the EC White Paper on Pensions has set a milestone in the policy dialogue on pensions in Europe. The European Parliament has started the political discussion within its Employment and Social Affairs Committee and within the Economic and Monetary Affairs Committee on the different policy initiatives contained in the document. As the outcome of that discussion would represent the political opinion of the European Parliament on many controversial initiatives, AEIP Commission I and II decided to deliver a political letter to the MEPs involved where the most important topics for the AEIP members were raised. Indeed, the letter stressed the important role of social partners in setting up and running more adequate, safe and sustainable

pension systems and raised concerns over any EU action that would endanger or destabilize those national pension schemes that represent today the main source of income for pensioners.

#### **PRELIMINARY DISCUSSIONS ON THE FORTHCOMING EC GREEN PAPER ON LONG TERM INVESTING**

In June 2012 Michel Barnier, European Commissioner for Internal Market and Services, announced the launch of a Green Paper on the long term financing of the European economy. Following to this announcement, AEIP started an internal reasoning on the role of pension funds as key actors in the financing of long term investments, which are essential for restoring growth in Europe.

#### **CONFERENCE AND EVENTS**

##### **EC Pension Forum**

AEIP is an official member of the European Commission's Pension Forum. The 2012 meeting, held in Brussels on October 2nd, was dedicated to the policy initiatives contained in the White Paper “An agenda for sustainable, safe and adequate pensions”. The Pension Forum involved several services of the European Commission, i.e. DG Employment and Social Affairs, DG Internal Market, DG Economic Affairs and the DG Health and Consumer Affairs.

## 4 | Health Care COMMISSION III



The Purpose of this Commission is to promote best practices and raise awareness of current trends in the area of healthcare and the growing cost of the healthcare sector. Furthermore, this commission oversees all documentation, position papers and work within the Task Force Health and Care.

In the current context of demographic changes and an ageing population the topics discussed in the Commission are ever growing. They include, long term care, active ageing, and affordable healthcare systems. The working part of the Commission covers also monitoring of major developments on the cross border health care related issues across the EU Member States.

### MAIN ACTIVITIES OF THE COMMISSION III

#### **Coalition on Active and Healthy Ageing and Solidarity between generations**

Throughout the year 2012, AEIP as a member, was involved in activities of the Coalition on Active Ageing and Solidarity between Generations as a member. The Coalition was set up to support activities within the frame of solidarity between generations. It was led by the Age-Platform and was fed by contributions of its members (AEIP, AIM, COFACE, Eurochild, EAPN, etc.)

The Coalition committed to lobby for the European Year (EY) 2012 on Solidarity between Generations. In May 2011, the Council and the European Parliament agreed on the title, concept and the budget for the year 2012. The main pillars of the European Year were solidarity between generations, maintaining vitality and respect for the dignity of human beings.

Within this context, all members of the Coalition conceived and developed in 2011 two main supporting documents: a Roadmap and a Manifesto.

The Roadmap aimed at showing firm commitments of the member organizations (as well as their own national members) to support the objectives of the EY 2012. The Roadmap was disseminated at a Conference launching the EY 2012, on the 18 January 2012 in Copenhagen.

The Manifesto outlined the Coalition's vision of a society for all ages and what participation of older people could be fostered and an age friendly environment across the EU could be created.

The EU official ceremony closing the European Year 2012 took place in Nicosia, Cyprus, on 10 December 2012. The event brought together a wide range of stakeholders from all over the UE and provided an overview of the diverse initiatives taken during the year. Some policy initiatives in different EU countries were presented.



**OTHER TOPICS THAT WERE DISCUSSED  
WITHIN THE COMMISSION III ARE THE  
FOLLOWING**

- The Danish Presidency priorities in health and social care
- European Initiative on Active and Healthy Ageing (EIP AHA)
- Cross-Border patient mobility
- Long Term Care reform in France

**“Investment in Common Good Innovation:  
Role of Pension Funds”**

Invited by the Equity in Health Institute, AEIP participated at the end of the year 2012 in a preparatory meeting to reflect on possibilities for pension funds to invest in common goods such as local health infrastructures. This expert group that AEIP joined in January 2012 is composed of experts from different fields, namely health research institutes, health professionals, coordinated and occupational retirement/pension schemes representatives, local health authorities and European decision-making representatives.

The group is involved in drafting a paper that will be sent to the European Commission. The purpose of the Draft paper is to analyse current legal environment for long-investment for Pension Funds as well as an added value for health care efficiency in the context of the ageing population and morbidity. A Conference on “Investment in Common Good Innovation is planned for April 2013.

## 5 | Paid Holiday Schemes COMMISSION IV

The members of the Commission IV operate paid holiday funds which provide benefits both to domestic and posted workers within the Construction Industry.

Paid holidays and paid holiday schemes are an integral part of the mandatory rules for minimum protection under the Directive 96/71/EC on posting of workers. In accordance with the aim of this directive, the Commission IV advocates rules that guarantee both fair competition and social protection of workers.

The Commission IV involves the European Social Partners of the construction sector (the European Construction Industry Federation – FIEC and the European Federation of Building and Woodworkers – EFBWW).

### RELEVANT DOSSIERS TREATED IN 2012

#### Enforcement of the Posting of Workers Directive proposal

In 2012 the European Commission issued its proposal for a Directive on the Enforcement of Directive 96/71/EC. This Directive represents a topic of utmost importance for the Commission IV Paid Holidays Scheme. Throughout 2012, AEIP participated in a number of events in the European Parliament dedicated to the “Enforcement directive”, getting in touch with the Rapporteur and several other Members of the European Parliament (MEPs) involved in this dossier.

In July, the first AEIP position paper on the enforcement of the Posting of Worker directive was issued and disseminated to the Parliament. Later on, in October, a second version of the paper, including some amendment proposals, was published and disseminated. Once the draft report from the Rapporteur had been released in autumn 2012 and more than 800 amendments tabled by several MEPs, AEIP delivered a letter to the MEPs of the three different Committees involved (Employ-



ment and Social Affairs, Legal Affairs, Internal Market) in order to support/oppose particular amendments that were relevant for its members.

#### Monitoring of the discussions on the Intra-Corporate Transfers and the Seasonal Workers Directive

Throughout 2012, AEIP has followed the discussions on the Directive proposal COM(2010) 378 and COM(2010) 379 on the conditions of entry and residence of third-country nationals in the framework of an intra-corporate transfer and for the purpose of seasonal employment. The two directives have been analysed and discussed together with the social partners FIEC and EFBWW.

In particular, AEIP took contact with the relevant decision-makers in the Parliament in order to follow the discussions of the trilogue meetings of the two dossiers.

## 6 | Health and Safety at Work COMMISSION V



Led by the Spanish Fundacion Laboral, the AEIP Commission V on health and safety at work meets four times a year to exchange opinions and share best practices to reduce occupational accidents.

A healthy and safe working environment is essential element of the quality of work. Work accidents are unfortunately widespread in the sector. The need to improve working conditions is a concern for all stakeholders. Social partners can significantly contribute to reducing occupational accidents by creating and managing social funds on health and safety. They usually focus on prevention which is an important part of the approach.

### CODE OF PRACTICE FOR THE BUILDING AND CONSTRUCTION INDUSTRY

Meetings of the task force Health and Safety have been focused on the development of a common code of practice for the building and construction industry, which aims at rising safety awareness in the construction industry. This should ensure that site personnel undergo basic occupational health and safety awareness training with the view to prevention of accidents and avoidance of health hazards. All participants are provided with a certificate that indicates that the holder has attended this basic course on health and safety.

### MATRIX STUDY ON RECOGNITION OF NATIONAL TRAININGS ON HEALTH AND SAFETY FOR THE CONSTRUCTION SECTOR

At the Fundacion Laboral's initiative, a matrix study was designed to help better identify national experiences concerning trainings and their recognition for the construction workers across EU member States. All members of the Commission V completed the questionnaire which will help to identify gaps and address them in further steps. AEIP will then address the issue of recognising national training on health and safety at work in the construction sector.

### OSHA "HEALTHY WORKPLACES CAMPAIGN 2012-2013" ON "WORKING TOGETHER FOR RISK PREVENTION"

AEIP was accepted as an official partner of the Healthy Workplaces Campaign 2012-13 on working together for risk prevention in November 2012. This Campaign is co-ordinated by the European Agency for Safety and Health at Work (OSHA).

The theme for 2012-2013 "Working together for risk prevention" is part of the overall "Health at Workplaces" campaign initiated by OSHA.

The 2012-13 OSHA Campaign is designed to help national authorities, companies, organisations, managers, workers, their representatives and other stakeholders to work together on health and safety in the workplace. The campaign focuses on the following topics:

- risk prevention
- managing risks
- encouraging top managers to actively engage in risk reduction
- encouraging workers, their representatives and other stakeholders to work with managers to reduce risks.

Addressing safety and health also creates significant opportunities both for the employers and the workers: fewer accidents, healthier, happier and better motivated employees, increased productivity as a result and also a better reputation for corporate social responsibility among investors, customers and communities.



## 7 | Task Forces



### THE CONSTRUCTION SECTOR

The Task Force of the Construction Sector has been created in 2001. It represents a meeting platform for European pension schemes active in the construction sector. This sector is notably the one with the highest mobility of workers in Europe. The aim of this Task Force consists in informing the Members about AEIP works in the field of occupational retirement, exchanging best practices in asset management and improving pension awareness. Furthermore members identify common elements that would help to improve and guarantee an adequate pension during retirement. In this context, the members dealt continuously with the impact of the financial crisis on social protection schemes and the effect it had on their investment strategies.

The European Social Partners of the construction sector (the European Construction Industry Federation – FIEC and the European Federation of Building and Woodworkers - EFBWW) are involved in this Task Force. of.

### TERRITORIAL AND SOCIAL PROTECTION SCHEMES

The Task Force on Territorial Social Protection Schemes (TFTSPS) is a working group specifically dedicated to social protection schemes set up at territorial/ regional level. This Task Force studies the developments of these expanding initiatives. It shares existing experiences of the territorial social protection in supplementary pensions, healthcare and long-term care.

This Task Force organises regularly conferences in Venice.

Currently, the three most important topics of this task force are:

- 1) The role of the local governments promoting the adhesion of their citizens to (local) social protection schemes;
- 2) Local investments of territorial funds;
- 3) Strengthening of the cooperation with the Committee of the Regions of the EU.

Pension funds are primarily aimed at providing pension benefits to their Members. However, their resources could also contribute to develop the economies and the infrastructures of the territories in which these funds are based. Within a wider framework of the existing legal provisions and of the investments' policies chosen by the pension funds, the use of their financial resources for local investments on their territories should be considered.

Mid-long term local investments can also significantly reduce risks sought by the trends of financial markets, particularly by combining the development of the local economies and the pension goals.

### METAL INDUSTRY

The Task Force of the Metal Industry has been created in 2010. The objective of this Task Force is to share best practice examples with regard to social affairs, employment issues, pension policy (i.e. solvency issues, investment strategies, transferability of pension rights, mobility of workers) and other related issues that are of interest for the members. In 2012 the Task Force Metal Industry met twice. Present were sectoral pension schemes from France and the Netherlands and representatives from the European social partners of the metal industry, CEEMET and industriAll. The discussions focussed on the review of the IORP directive and the competitiveness of the European Metal Industry.

### HEALTH AND CARE SECTOR

The objective of the Task Force is to share best practice examples with regards to trends in health and care, particularly on health workforce related issues. It allows major stakeholders to gather together to discuss sector specific issues, new developments and future challenges. The works of this Task Force feed into the ongoing work of the European Institutions.



Regarding the current trends such as an ageing population in the workforce, mobility of services, and their consequences in social protection, the AEIP Managing Board decided in 2009, to create a new working group with the goal to share the best practices in the sector of health care with special regard to the health workforce.

#### **EU Joint Action on Health Workforce Planning and Forecasting**

AEIP was accepted as collaborating partner of the “Joint Action on workforce planning and forecasting” in July 2012. The “Joint action on forecasting health workforce needs” adopted in 2012 with Member States and major stakeholder aims at improving workforce planning to better anticipate labour market trends and future skills and competences. The joint action seeks to improve data on migration and mobility of health professionals.

#### **Long Term Care: Joint Working Group with AIM and Reflection Paper**

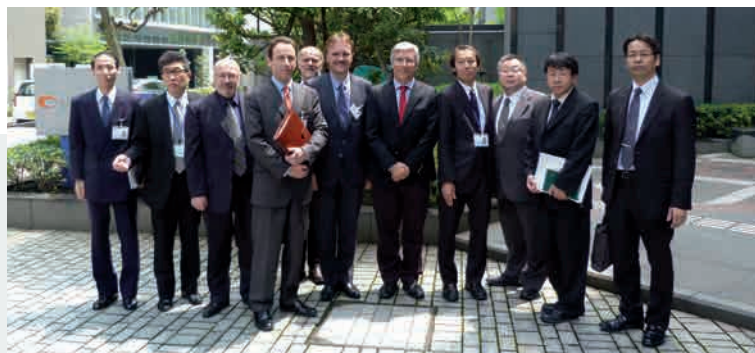
In 2010, the Task Force began to widen its perspective on the social and economic Long Term Care related issues.

#### **AIMS OF THE JOINT ACTION**

- Provide information and exchange best practices on planning methodology
- Estimate future needs in terms of skills and competences
- Advise on how workforce-planning capacities can be built up
- Develop EU guidance on how donor and receiving countries can cooperate
- on training capacities and
- Provide information on mobility trends
- Sustainability of the results of the JA



AEIP was represented by the President Peter Huber and the Director Francesco Briganti in the study trip to Japan held in April 2012.



### ***AEIP-AIM Long Term Care Joint Working Group***

To better answer its members' expectations, AEIP and Association Internationale de la Mutualité (AIM) commit in a joint working group on Long Term Care. The working group is chaired by Bruno Gabellieri (Secretary General, AEIP) and Dr. Rachelle Kaye (Maccabi healthcare Services). Set up in 2010, the activities of the group have progressively focused on "healthy and active ageing".

The purpose of the group is to be recognized as a stakeholder in the European network on long term care and make the voice of AEIP-AIM heard. At the initiative of AIM, AEIP and the Education and Solidarity Network (ESN) a study trip on Long Term Care to Japan was organized in April 2012. The purpose of the study trip was to establish a network to ease exchange of experience on Long Term Care with Japanese experts and to organize an international dialogue on long term care with the experience from AIM, EI, AEIP, OECD and ILO.

As a follow up of the trip, an international conference on long term care is scheduled for September 2013 in Paris. It will touch upon social and health

long term care approaches in Japan, United- States, Europe but also from a broader perspective on international institutions particularly OECD and ILO.

### ***AEIP Reflection paper on Long Term Care***

In September 2012 AEIP adopted a reflection paper on long term care in view of the following Social Investment Package including a Staff Working Paper published by the European Commission, Employment and Social Affairs General Directorate in February 2013.

The main issues touched upon this position paper are the following:

- Need for a specific status for carers
- Long Term Care leave and flexible working hours possibilities
- Long Term Care working conditions
- Training Long Term Care Workforce
- Long Term Care insurance

Following discussions on major developments on long term care related issues across the EU member states, AEIP together, with a Finnish Member of the Task Force (Finnish Federation of Financial Services – FFFS), will be organizing a study trip to Helsinki in September 2013 to learn about the recently adopted law on long term care and the pilot study to evaluate long term care risks.

### **TASK FORCE EMPLOYMENT**

The Task Force Employment was launched at the initiative of the AEIP Management Board in November 2012. The First meeting was organised in January 2013.

The purpose of the Task Force is the exchange of innovative ideas and best practices on employment related issues across countries.

It is composed by representatives of employment public agencies, think tanks, unemployment benefit providers, social partners and organizations and paritarian organisations. They promote either unemployment benefits or promote employment through vocational training programs to better answer the offer and the demand of labour market.

## 8 | Partnerships

### TRANSATLANTIC PARTNERSHIPS

On 8-10 June 2012, in Paris, AEIP co-organized the 3rd Annual Transatlantic Conference. The Transatlantic Conference has been a tradition since 2008, when AEIP signed a protocol with its partner from the USA, namely the National Coordinating Committee for Multiemployer Plans (NCCMP) and with the Canadian partner Mutli-employer Benefit Plan Council of Canada (MEBCO).

The purpose of the partnership is to better coordinate lobbying activities where common interests are shared, particularly to raise the voice of Paritarism.

With this respect, thanks to our protocol with Noth American Partners, we work closely with Assistant Secretary to President Barack Obama's cabinet, Ms Ph. Borzi, who worked on Affordable Care Act 2010.

The annual conference bring together social protection institutions, government representatives, social partners, banking representatives and industry employees from both sides of the Atlantic, to exchange good practices and to discuss the current situation in the USA and Europe and the possible solutions to be implemented.

### PARTNERSHIP WITH THE ASSOCIATION INTERNATIONALE DE LA MUTUALITÉ (AIM)

AEIP work in partnership with AIM on issues related to long term care within a joint-working group. For more information please look at the Health and Care chapter of the Activity Report.

### SCIENTIFIC COUNCIL

The Scientific Council of AEIP is composed of 21 professors and advisors from 9 different countries. It meets once a year to discuss innovative ideas with regard to social protection and the role of paritarian management at European level in particular.



Cooperation signed in Montpellier:

1. University of Montpellier (Represented by Professor Philippe Coursier)
2. University of Heidelberg (Represented by Professor Peter-Christian Müller-Graff)

The Scientific Council advises AEIP on current affairs, produces studies, contributes to draft agendas of AEIP events and gives relevant presentations. With the increasing membership of the AEIP, the Scientific Council is expanding too.

In 2012, the Scientific Council was joined by the following universities:

1. University of Montpellier (Represented by Professor Philippe Coursier)
2. University of Heidelberg (Represented by Professor Peter-Christian Müller-Graff)

### COALITION ON ACTIVE AGEING AND SOLIDARITY BETWEEN GENERATIONS

AEIP is a member of the Coalition on active ageing and solidarity between generations. The Coalition was set up to support activities within the frame of solidarity between generations. It is led by the Age-Platform and gathers a wide range of NGOs (AEIP, AIM, COFACE, Eurochild, EAPN, etc). Consequently, the Coalition committed in a strong lobbying for the European Year 2012 on Solidarity between generations. For more information please look at the Health and Care chapter of the Activity Report.

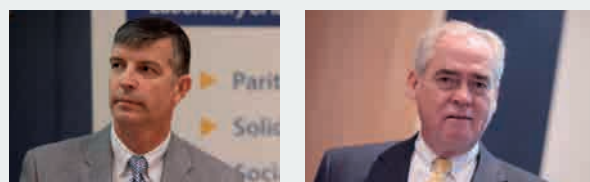


## 9 | AEIP Conferences 2012



Thanks to the protocol signed with our Partner from North America, we work in close collaboration with Phyllis Borzi, Assistant Secretary, US department of Labour, Employee Benefit Security Administration.

Photos: ©Philippe Chagnon / cocktail-santé.



On June 27th-28th in Paris, AEIP jointly organized the 4th Transatlantic Conference entitled "Building for the Future: Tackling Together the Global Challenges of Social Protection".

Photos: ©Philippe Chagnon / cocktail-santé.

### AEIP-NCCMP-MEBCO JOINT CONFERENCE: PARIS

On June 27th-28th in Paris, AEIP jointly organized the 4th Transatlantic Conference entitled "Building for the Future: Tackling Together the Global Challenges of Social Protection" with its American and Canadian partners, the National Coordinating Committee for Multiemployer Plans (NCCMP) and the Multi-employer Benefit Plan Council of Canada (MEBCO)".

In 2012 the conference took place in Paris. The two-day conference gathered more than 150 guests and touched upon an array of topics related to social protection in a transatlantic dimension.

High level speakers from the European social partners, the European Commission, OECD, European universities and several pension funds discussed sustainability and adequacy of current European and American pension systems, forthcoming initiatives on solvency rules for occupational pension funds and possible solutions to exit the economic crisis.

Furthermore, speakers from think tanks and academic institutions tackled the challenges linked to accessibility and sustainability of health and long term care systems, active ageing of the population and employment policies in Europe and America.

The importance of the topics touched upon during the second day of the conference were highlighted by the decision of the US Supreme Court delivered on the same day on the constitutionality of the Affordable Care Act, the US healthcare system reform entered into force in 2011. Indeed, the decision was warmly welcomed by Ms Phyllis Borzi,





AEIP organized the 9th annual conference on « A long term perspective on an inclusive labour market, complementary health care, local investments » on 18 October 2012 in Venice.

Assistant Secretary, U.S. Department of Labour, Employee Benefit Security Administration, who regularly participates to the Transatlantic Conference.

The final session of the event, dedicated to the future of social protection schemes, representatives and researchers reflected on future challenges of social protection systems of tomorrow.

**AEIP CONFERENCE: "EUROPEAN CONFERENCE: A LONG TERM PERSPECTIVE ON AN INCLUSIVE LABOUR MARKET, COMPLEMENTARY HEALTH CARE, LOCAL INVESTMENTS"**

AEIP organized the 9th annual conference on « A long term perspective on an inclusive labour market, complementary health care, local investments » on 18 October 2012 in Venice. The goal of the conference was to discuss social protection related issues, such as complementary health (organizational and financial aspects, access and investment), unemployment, and local investments.

The conference gathered representatives from International Health organisations, business sectors, paritarian institutions as well as regional authorities from the Veneto Region in Italy, and other neighbourly regions.



Conference Venice, 18 October 2012.



Board Meeting, Venice, 19 October 2012.



# Members\*

## Associate Members



 Germany	 Germany	 Austria	 Belgium	 Finland
 France	 France	 France	 France	Assoprevidenza/Mefop Italy
 Italy	 Luxemburg	 Netherlands	 Switzerland	

## Observers

 Spain	 Spain	 Finland	 Ireland
 Ireland	 Italy	 Italy	 Liechtenstein
 Romania	 United Kingdom	 Switzerland	 Switzerland

\* as of 30/06/2012

## Partnership

 Canada	 United States
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\* as of 30/06/2012

Through its Protocols of Cooperation, AEIP has established partnerships with universities and with social protection organizations outside of Europe who are dealing with similar issues. AEIP has regular contact with these institutions and collaborates with them in the organizations of various conferences and seminars.

## Correspondents

			
Bulgarie	Spain (CNEPS)	France	France
			
France	France	Greece	Greece
			
Hungary (ONYF)	Latvia	Poland	United Kingdom

## Task Force Members (as of 30/06/2012)

				
Belgium	Spain (MGC)	Finland*	France	France*
				
France (HPGM)	France*	France*	France*	France
				
France*	Ireland	Italy*	Italy*	Italy
				
Netherlands*	Netherlands*	Netherlands*		

\* Membres of membres










## Scientific Council \*

The Scientific Council of AEIP is composed of 20 professors and advisors from 9 different countries. It meets once a year to discuss innovative ideas with regard to social protection in general and the role of paritarian management at European level in particular.

The Scientific Council advises AEIP on current affairs, produce studies, contribute to draft agendas of AEIP events and give relevant presentations. With the continuous expansion of AEIP into new European countries, the Scientific Council is planned to expand too.

For this reason, contacts with some of the best academics from the concerned countries are already being established.

Below are the names of the organizations and representatives to AEIP's Scientific Council:

	<b>BELGIUM</b> <b>Prof. Dr. Yves Stevens</b> (Katholieke Universiteit Leuven) <b>Prof. Dr. Yves Jorens</b> (Universiteit Gent) <b>Mrs. Lut Sommerijns</b> (Loyens & Loeff)
	<b>FRANCE</b> <b>Mr. Philippe Laigre</b> (Philippe Laigre et associés) <b>Prof. Philippe Coursier</b> (Université de Montpellier 1) <b>Mr. Pierre Chaperon &amp; Mrs. Cécile Vokleber</b> (AGIRC-ARRCO)
	<b>GERMANY</b> <b>Prof. Heinz-Dietrich Steinmeyer</b> (Westfälische Wilhelms Universität Münster) <b>Dr. Janda &amp; Prof. Eichenhofer</b> (Friedrich-Schiller-Universität Jena) <b>Mr. Olivier Schumacher &amp; Mrs. Stéphanie Klein</b> (SOKA BAU) <b>Prof. Christian Müller - Graff</b> (Heidelberg)
	<b>GREECE</b> <b>Prof. Dr. Konstantinos Kremalis</b> (Kremalis Law Firm)
	<b>ITALY</b> <b>Prof. Pasquale Sandulli</b> (Sapienza Università di Roma) <b>Prof. Federico Spandonaro &amp; Mr Michele Faioli</b> (Università degli Studi di Roma "Tor Vergata")
	<b>THE NETHERLANDS</b> <b>Prof. Erik Lutjens</b> (Vrije Universiteit Amsterdam)
	<b>PORTUGAL</b> <b>Prof. Arlindo Donario</b> (Universidade Autónoma de Lisboa)
	<b>SWITZERLAND</b> <b>Mr. Jacques-André Schneider</b> (LHA, Suisse) <b>Mr. David Pittet</b>
	<b>UNITED KINGDOM</b> <b>Prof. Bryn Davies</b> (Union Pension Services Ltd)

\* as of 30/06/2012

## Managing Board

The AEIP Managing Board is paritarian in nature and is made up of the Associate Members which nominate two delegates. One delegate represents the employees while the other delegate represents the employers. The officials of the Managing Board are elected for a two year term.

The President of the Managing Board, who is also the President of the Association, changes every two years and his position also alternates from an employee to an employer representative.

On June 21st 2013, AEIP - the European Association of Paritarian Institutions of Social Protection - held its annual General Assembly in The Hague.

During the GA, the AEIP Bureau, involving the four key executive roles within the AEIP Board, were renewed. Having served the statutory two-year term as AEIP President, Mr Peter Huber, current President of SOKA BAU (DE), representing the employers' side, has stepped down.

The AEIP Presidency is thus passed on to Mr Gerard Riemen (Pensioen Federatie, NL), Director General of Pensioen Federatie, the Dutch Federation of Pension Funds, for the 2013-2015 term, representing the employees' side, according to the paritarian management rotation of AEIP management.

## AEIP Secretariat

**Bruno Gabellieri**  
Secrétaire Général  
Bruno.Gabellieri@aeip.net

**Working Areas**  
Supervision of the Team

**Francesco Briganti**  
Director  
Francesco.Briganti@aeip.net

**Working Areas**  
Development of AEIP; Responsible for the Brussels Based Team; EU Coordinated Retirement Schemes; Pensions Funds; Mobility; Social Dialogue; IORP Directive; Works of European Court of Justice; the Pension Forums of the European Commission and European Parliament; Media relations; Human Resources

**Nicolo Brignoli**  
Economic and Financial  
Affairs Advisor  
Nicolo.Brignoli@aeip.net

**Working Areas**  
Prudential and Supervisory Issues; EIOPA; Solvency; Pension Funds; Responsible Local Investments; Construction Sector Issues; Task Force Metal Workers

**Task Force(s)**  
Construction Sector; Paid Holiday Schemes; Metal

**Magdalena Machalska**  
Health Affairs Advisor  
Magdalena.Machalska@aeip.net

**Working Areas**  
Healthcare Issues; Relations with European Institutions and Lobby Organizations; Intergenerational Solidarity; Active Ageing; Employment

**Task Force(s)**  
Health and Care Sector; Health & Safety at work; Employment

**Corinne Lamarq**  
General Affairs Manager  
Corinne.Lamarq@aeip.net

**Working Areas**  
Communication Strategy; Event Planner in Europe; Membership; Responsible for sponsoring; Secretariat of the Board; AEIP development and External Relations; In charge of Bodies

**Brigitte Frère**  
Office Manager  
secretariat@aeip.net

**Working Areas**  
Administrative support to the Director; Communications material; Website/Intranet Coordination; Logistics of Events/Conferences/Meetings in Belgium; Accounting; Database updates; Administration and Office Management



**PRESIDENT**  
Mr. Gerard Riemen  
VB  
The Netherlands



**VICE PRESIDENT**  
Mr. Renato Guerriero  
DEXIA  
Luxemburg



**TREASURER**  
Mr. Bernd Merz  
BG BAU  
Germany



**SECRETARY OF THE BOARD**  
Mr. Michel Keller  
OCIRP  
France



**Bruno Gabellieri**  
Secretary General



**Francesco Briganti**  
Director



**Corinne Lamarq**  
General Affairs Manager



**Nicolo Brignoli**  
Economic and Financial  
Affairs Advisor



**Magdalena Machalska**  
Health Affairs Advisor



**Brigitte Frère**  
Office Manager



## HEADQUARTERS

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### MISSION

Promotion of Paritarian Social Protection Schemes and defence of the shared interest of its members.

### PHILOSOPHY

As a key player in the area of Social Protection at European level we promote responsible and efficient Paritarianism across Europe and are recognized as an added-value for our members and partners.

### WHO ARE WE?

AEIP is the leading non-profit association gathering institutions, organisations, companies and federations involved in the development and management of Paritarian Social Protection schemes in Europe.

### WHAT DO WE WANT? (IDENTITY, DNA)

We have been entrusted by our members with the responsibility to protect and defend the Paritarian social protection schemes at the local and the European level. Our ambition is to be the leader exercising influence to strengthen and ensure sustainability of Paritarian social protection schemes.

### WHAT DO WE DO?

Through our presence, our proposals and our communication we defend, develop and promote a responsible and powerful Paritarianism as a means for optimal and efficient social protection.

### WHERE DO WE GO IN MEDIUM TERM?

Our intermediate goals are the following:

- Fully ensure advocacy of our Associations' members' interests
- Managing our growth to focus on the sustainability of the current situation

### WHERE DO WE GO IN LONG TERM?

Our ultimate goal is to be recognized as a major European player and as an inexhaustible source for improving efficient Paritarian social protection schemes in Europe and support our member organisations in this respect. Owing to the quality of its members and to the delegation of powers conferred to its Board, AEIP will become the leading body for the promotion of balanced paritarian social protection systems in Europe.

### AEIP VISION

AEIP will promote and develop programs and orientations aiming at the sustainability of paritarian social protection systems at local level taking into account the national specificities aiming at ensuring social cohesion in Europe.

Based thereon, AEIP prepares recommendations, proposes local programs and influences European decisions to safeguard and promote the interests of its members. AEIP will think ahead and anticipate modern paritarian social protection systems that take into account changing economic and societal pattern. It will furthermore seek to find a new balance between and across generations.

