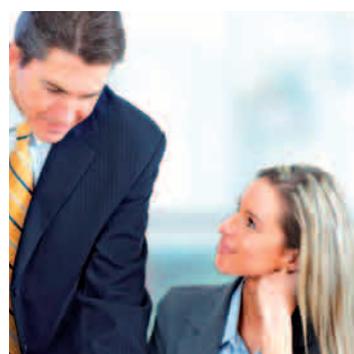
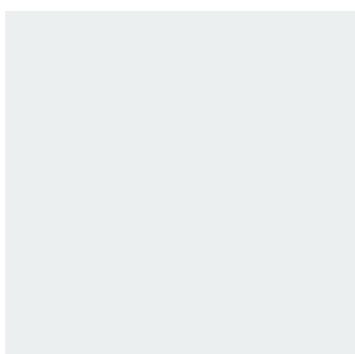
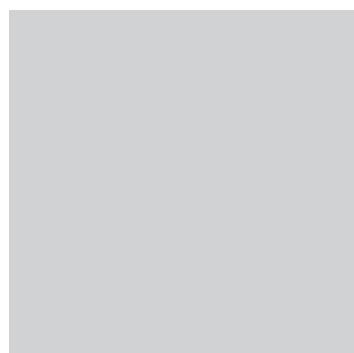
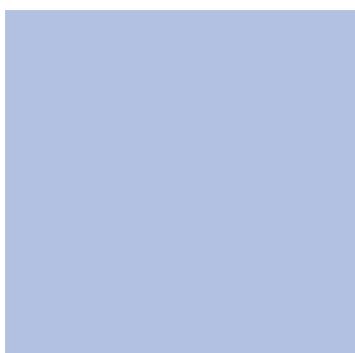
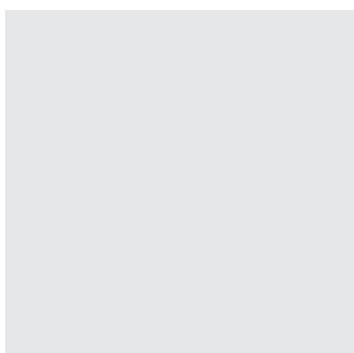
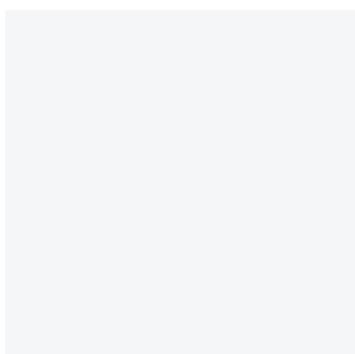
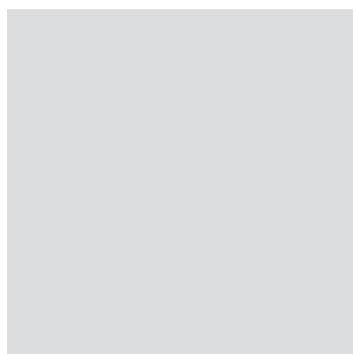
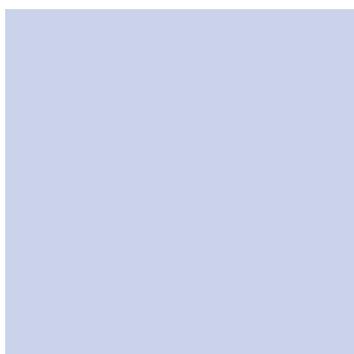


# AEIP | Activity Report 2011

European Association of Paritarian Institutions of Social Protection



...the ...

# | Summary

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In the memory of **Jacques Brossard**,  
AEIP President 2007 - 2009

## Foreword President



Peter Huber

Since I have taken the office as new President of AEIP, I realized that our Organization was much bigger and more important than the previous times when I was holding the role of Treasurer.

This acknowledgment led me to start some renewals that should have updated the internal functioning of AEIP, in order to meet the new needs of the Organization. Before introducing these changes, I met in 2011 all our main members, one by one, and I collected their points of view and their main requests.

Several changes have been already introduced, and today I am very proud to say that AEIP is stronger and more efficient in its functioning; moreover, I am reassured to know that these decisions have been taken with the consensus of our members. With this regard, I also seize the opportunity to thank all the Members, who all have profitably and responsibly contributed to introduce these improvements with the typical AEIP's spirit of cooperation and mutual care of the others' points of view. I also thank the Secretary General and the AEIP's Director, who assisted me in this process.

"Friendship and Mutual Respect" have been the main reason of success of AEIP, confided to me by once Jacques Brossard, an extraordinary former President of AEIP, and a personal friend of mine and of all AEIP. Unfortunately Jacques left us recently, but I notice all the time that he was completely right, and so I keep quoting his statement, even though AEIP is not anymore the small family of some years ago, because has been remarkably growing.

But I also think that there are neither limits to growth, nor to ambition for this Association: that's why, after updating the functioning of the new "bigger AEIP" this year, my next commitment will be the one of making it bigger, by enlarging this Organization to new Members, new Countries and new social protection fields. I am therefore planning to arrange several meetings in Europe in order to pro-

mote our Organization. Some interesting contacts have been already taken, and some organizations expressed their interest in establishing contacts with us. I am sure we will be successful in this mission, and we will reap in a future the rewards of these efforts: it has always been like this, and it will be in the next years as well, despite the economic and financial crisis of which we are all aware.

Moreover, considering the model of management of social protection that we do represent, our arguments are even more proving to be the right ones, during these difficult moments for Europe and the West. Therefore, I would be not at all surprised that the interest for our Organization will increase around in these times, as it already happened for the Governments and Social Partners of some European Countries, which invited us to provide them with some inputs concerning their social protection reforms.

The Paritarian Model is more and more observed, studied and quoted in Europe and even elsewhere: AEIP has been playing a great role in promoting that, with all the European Institutions, the National Governments, the International Organizations and the Academia. That's why I'm proud of chairing this Organization and I will do my best, in the second half of my mandate, to make AEIP even stronger, bigger and more recognized than it is already now.

A stylized handwritten signature in blue ink, consisting of several overlapping loops and lines.

Mr. Peter Huber  
Soka Bau President

## Foreword Secretary General



Bruno Gabellieri

In 2011 AEIP faced one of the most challenging lobbying issues of the last years: the calls for advice of EIOPA on the review of the IORP Directive (Directive 2003/41/EC) on the Activities and Supervision of Institutions for Occupational Retirement Provision.

The activities of AEIP on this topic have not been finished yet, as a new consultation on a Quantitative Impact Study was provided in 2012. The revision of IORP Directive could have very serious consequences for our paritarian pension funds, especially as for future possible solvency rules on pension funds, and so AEIP has been making its best in order to defend them. AEIP will therefore keep working on those sensitive topics during 2012 by intensifying the meetings of its Occupational Pension Security Working Group and improving its strategic alliances with other stakeholders in Europe. As for myself, I'll keep defending the reasons of our Members in the EIOPA's Stakeholder Group for Occupational Pension, of which I am a member.

The last year AEIP has also been working on another key initiative of the EU on pensions by following the steps of preparation of the EC White Paper on Pensions, which was then just published in February 2012. The White Paper represents the follow-up of the Green Paper on Pensions that was published by the European Commission in 2010. At that time, AEIP drafted a thick position paper that basically resumed the entire AEIP's point of view on pensions in Europe.

In 2011, AEIP also strengthened its activities in Healthcare and Long Term issues, by organizing a Conference in Rome and remarkably improving its contacts with the officials of the EU Institutions; in 2012, AEIP will further increase its involvement on such topics, after adding in its team a new expert just specialized in healthcare and long term care.

Another fundamental challenge for AEIP in 2011 has been the monitoring of the steps that led to the EC Proposal of a Directive on the enforcement of Directive 96/71/

EC concerning the posting of workers in the framework of the provision of services (Enforcement Directive); this work was coordinated with the monitoring of the development of the EU Proposals concerning the conditions of entry and residence of third-country nationals of both an intra-corporate transfer (ICT Directive), and of seasonal employment (Seasonal Workers' Directive). In 2012, AEIP will make its lobbying in order to defend the high social standards provided by its paritarian members, and avoid that the purpose of the freedom of services be detrimental to the social values supported by AEIP.

In 2011, our Association further grew despite the current financial and economic crisis: OCIRP from France as Associate Member, Previmedical from Italy as member of the AEIP Task Force Health and Care, and Pensiju Fonds from Latvia as Correspondent. OCIRP is the Union of the Paritarian Institutions covering the social risks of families; Previmedical is an Organization providing administrative services for paritarian healthcare funds; Pensiju Fonds is one of the biggest Latvian pension funds, and it has a governance involving the same number of representatives of employers and employees.

Finally, in 2012 AEIP will further grow: new applications for membership have been already submitted, and our mission will anyway continue in seeking paritarian organizations in Europe.

Mr. Bruno Gabellieri  
Secretary General



# AEIP 15<sup>th</sup> Anniversary

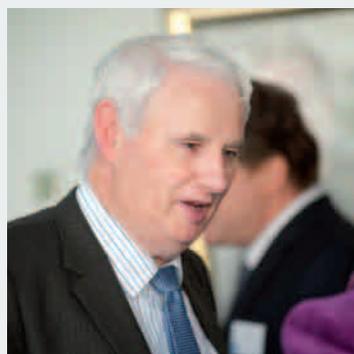
**On the 20<sup>th</sup> of September 2011, in its new headquarters (24 Rue Montoyer), the AEIP was proud to celebrate its 15<sup>th</sup> Anniversary. The organization has shown remarkable growth in size and influence over this period.**

Over the past 15 years AEIP has advocated in the interest of its Members. As the association continues to grow, (currently 26 Members and 29 affiliates from 19 different European countries) so do the issues and challenges in the world of social protection.

About 100 people participated in the event. Among them were representatives of the European Commission, the European Economic

and Social Committee, the European Trade Unions and the European Employers Association. These testimonies allowed for a clearer understanding of what AEIP represents for us and for our partners.

Among others, AEIP was honored to host Ms Luisa Todini, President of FIEC; Mr Domenico Pesenti, President of EFBWW; Mr Jung-Duk Lichtenberger, Economic and Policy Desk Officer of the European Commission – DG Internal Market; Mr Fritz Von Nordheim, Policy Coordinator, European Commission – DG Employment; Mr Petru Sorin Dandea, Member of the European Economic and Social Committee.



# 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.

### WORKS OF AEIP FOR EUROPEAN COORDINATED RETIREMENT SCHEMES

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 pillar I, the evolution of the EU Coordination of Social Security Pension Schemes and it analyses the new challenges and current pitfalls within pillar I.

During 2011 the Commission met four times and discussed several issues, both at national and EU level. In particular, it discussed the (former) CEIOPS<sup>1</sup> Stability Report published in early 2011, focussing on the developments of the financial markets and the uncertain macro-economic environment outlook, rising government debt levels, low long-term interest rates, and a rebound on equity markets following their contraction in 2008/2009. Among the topics discussed, particular importance was reserved to the French Pension Agreement which included the raising of the minimum statutory retirement age. Commission I also focussed much on its efforts in working and developing relations with the Eastern and Central Europe Countries (especially Latvia).

Lastly, the economic crisis and the resulting pension reforms were also a main issue addressed in Commission I. Throughout the year, different presentations were given by national experts explaining the different action plans governments, were discussing in order to meet the upcoming demographic challenge with regard to the adequacy and sustainability of pension systems.

### ISSUES OF COMMON INTERESTS: COMMISSION I AND COMMISSION II

After the response to the Green Paper on Pensions of 2010, the AEIP Commissions reviewed the White Paper "Towards Sustainable, Adequate and Safe Pensions" adopted by the European Commission. AEIP welcomed the fact that the EC has taken a comprehensive approach towards such a sensitive and complex theme, which indeed touches upon macroeconomic and demographic balances, living and employment conditions and aims at tackling the challenges Europe will face in next decades without sacrificing the main features of the European social (and economic) model. In 2011, Commission I, in cooperation with Commission II, dedicated a vast amount of effort to respond to the European Insurance and Occupational Pensions Authority (EIOPA) Call for Advice (CfA) on the Review of the IORP Directive.

<sup>1</sup> Today CEIOPS has been replaced by EIOPA – European Insurance and Occupational Pensions Agency



Bruno Gabellieri, Secretary General of AEIP and Francesco Briganti, Director, at the Pension Funds and EU Policies Conference, Brussels 27/04/2011

#### **AEIP CONFERENCE: ECONOMIC AND SOCIAL COMMITTEE APRIL 27TH 2011 'PENSION FUNDS AND EU POLICIES', BRUSSELS**

Speakers from pension schemes and authorities of France, Finland, Belgium, Liechtenstein, the Netherlands, Germany, and EU Institutions gathered to deepen the policymaker-stakeholder relationship on the major issues surrounding pension systems, such as Pension Funds and Mobility of Workers in Europe; the prudential rules of occupational pension security schemes and the multi-dimensional aspects of IORP cross-border activities, as well as on solidarity and the role of the Social Partners. This conference outlined the importance that intergenerational solidarity, diversification, social dialogue, a healthy active population and paritarian management have in creating an adequate and sustainable pension system.

#### **AEIP CONFERENCE: "SUSTAINABILITY AND ADEQUACY OF FUNDED PENSION SCHEMES", MAY 25<sup>TH</sup> 2011, RIGA, LATVIA**

At the presence of the Minister of Welfare of Latvia, Ilona Jursevka, the Conference focused on the Central and Eastern European systems in terms of sustainability and adequacy, with presentations from Latvia, Estonia, Lithuania and the European Commission. A second session looked at joint management of pension funds and reaction to the crisis, with presentations from the AEIP, France and the Netherlands. The third session was devoted to pension adequacy and sustainability, where a EUROFUND research was presented. During the event, AEIP and its Members highlighted the added value of the paritarian management of social protection. A discussion also followed between the panellists and the audience about possibilities of implementing the paritarian model in Latvia in the future.

## 2 | Occupational Pensions

### Commission II and Solvency Working Group



### Commission II encompasses all issues surrounding paritarian pension funds.

This Commission is devoted to find ways, by which the occupational pension could allow for a greater mobility of workers, provides recommendations to European Institutions concerning the review of the IORP Directive, studies about investment strategies and governance issues and works on identifying a suitable occupational pension security regime.

2011 was a crucial year for lobbying on new solvency rules for IORPs proposed by the European Commission. The AEIP Commission II decided to re-launch its Working Group on Solvency which successfully lobbied in the past against the application of the Solvency II (SII) directive to pension funds. This working group has now been renamed as Occupational Pension Security Working Group (OPSWG) in order to reflect the need to identify more broadly an overall occupational pension security system which takes into account all the specificities of pension funds.

In 2011 the OPSWG met 5 times, bringing together 15 participants from 9 European countries (BE, DE, FI, FR, IT, LU, NL, UK and CH). Moreover, other institutions participated as observers, such as the European Association of Public Sector Pension Insti-

tutions (EAPSPI) in order to broaden the perspective of AEIP.

In the first half of 2011 AEIP delivered positions on a number of topics, namely on the Single Market Act, the Deposit Guarantee Schemes Directive and its effect on occupational pension funds in Germany and a position on an appropriate pension security system.

AEIP, jointly with its Transatlantic Partners NCCMP from the USA and MEBCO from Canada, also delivered a letter which dealt with the Exemption for foreign retirement plans under FATCA (Foreign Account Taxpayer Compliance Act).

In the second half of 2011, Commission II focused thoroughly on the EIOPA Call for Advice (CfA) on the Review of the IORP Directive. In more than 6 months of coordinated work, AEIP delivered technical feedback to EIOPA both to its first consultation on the call for advice of August 2011 and to the second consultation of January 2<sup>nd</sup> 2012. The delivered response comprised of more than 100 answers as a whole, ranging from legal to financial, actuarial and governance aspects of Institutions for Occupational Retirement Provisions (IORP).

In early 2012 AEIP also participated to a Public Hearing of the European Commission on this theme. Its Secretary General participated as a speaker in a Panel specifically dedicated to the Governance of pension funds ("How to improve governance and transparency of pension funds?").

Through the OPSWG, AEIP then delivered a press statement on the concerns related to the review of the IORP Directive jointly with other 7 leading institutions, namely the social partners associations Business Europe and ETUC, industry representatives EFRP, UEAPME, CEEP and many others. The main contents of the statement were published in the Financial Times and other relevant media.

Throughout the year, Commission II finally welcomed several speakers from the European Commission, EIOPA, and the KU Leuven during its meeting, providing insights on the current developments at EU level on relevant directives.

## 3 | Health and Care Sector



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 and care.

### TOPICS OF THE TASK FORCE HEALTH & CARE

- Health Workforce
- Mobility of health and care staff
- Policies for a healthy workforce in health and care sectors
- Long Term Care; its governance and its financing
- Creating combinations in long term care/ housing and pensions
- Investment strategies in Health & Care sectors
- Financing of health care, health insurance systems and risk management
- Reforms of Healthcare systems in Europe

The advantage of a specific task force dedicated to health and care is that it allows for similar parties across Europe to gather together in order to discuss sector specific issues, new developments and future challenges. In general terms, the objective of TFHC is to share best practice examples with regards to trends in health and care, as well as to monitor developments in the relevant EU health policy and social and labour law carrying out an impact assessment if needed. Moreover, this task force provides a networking platform encouraging the Members to work together to meet the challenges of the future whether it be in an informal discussion or through the works of European funded projects. The Task Force is also a platform to discuss Innovations of European Social Partners.

### AEIP-AIM LONG-TERM CARE JOINT WORKING GROUP

To better satisfy its member organizations' needs, AEIP and Association Internationale de la Mutualité (AIM) commit in a joint-working group on Long-term Care. The working group is chaired by Mr. Bruno Gabellieri (Secretary General, AEIP) and Dr. Rachelle Kaye (Macabi Healthcare Services). Set up in 2010, the activities of the group have progressively focused on "healthy and active ageing" related activities.



Coalition on Active ageing and Solidarity between Generations



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, and to raise the issue of Long Term Care as an important topic for AEIP member organizations.

As part of this partnership, a study trip on Long Term Care was scheduled to take place in Japan during 2011 (Japan is one of the most advanced countries in Long Term Care), as initiative of AIM, AEIP and the Education and Solidarity Network (ESN). The purpose of the study trip is to establish a network to ease exchange of experience on Long Term Care with Japanese experts and to organize an international conferment on Long Term Care with experience from AIM, EI, AEIP, OECD and ILO. However, due to earthquake in April 2011, the study trip was postponed for April 2012.

#### **AEIP CONFERENCE: "EVOLVING HEALTHCARE: NEW REFORMS AND LONG TERM CARE", MARCH 25<sup>TH</sup> 2011, ROME, ITALY**

On 25 March 2011 in Rome, AEIP and its Italian member ASSOPREVIDENZA jointly hosted a conference entitled "Evolving Healthcare: New reforms and Long Term Care".

The overall aim of the conference was to focus on the major developments in the demographic composition of our societies as well as the sustainability and the quality of life that we are planning for today's people and future generations. The interventions during the conferences were given by major representatives from both public and private health care providers from Europe as well as from the USA.

#### **COALITION ON ACTIVE AGEING AND SOLIDARITY BETWEEN GENERATIONS**

AEIP is also 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.).

To mark the 2<sup>nd</sup> European Day of solidarity and cooperation between generations in 2010, the coalition published a joint brochure to demonstrate the relevance of intergenerational solidarity in different policy frameworks (such as health, employment, education, etc.).

## 4 | Task Forces



### TOPICS COVERED BY THE TASK FORCES OF THE CONSTRUCTION SECTOR

- Proposal for a Directive on the enforcement of Directive 96/71/EC concerning the posting of workers in the framework of the provision of services;
- Proposal for a Directive on conditions of entry and residence of third-country nationals in the framework of an intra-corporate transfer;
- Proposal for a Directive on the conditions of entry and residence of third-country nationals for the purposes of seasonal employment
- Services Directive;
- Sustainability of construction pension schemes during the financial crisis: national strategies and government initiatives across the different Members States;
- Developments at national level on collective bargaining and paritarian governance.

### 4.1 THE CONSTRUCTION SECTOR

The **Task Forces of the Construction Sector** have been active since 2001. They represent a meeting platform for European social protection schemes active in the construction sector, which is notably the one with the highest mobility of workers in Europe. The aim of these Task Forces consists in informing the Members about AEIP works both in the field of occupational retirement and paid holiday schemes, exchanging best practices in asset management and improving pension awareness, finding common elements that would help to improve working conditions, paid holiday schemes and guarantee an adequate pension during retirement. In this context, the Members also continued to deal with the impact of the financial crisis on the social protection schemes and the effect it had on their investment strategies. Moreover, the Members of these TFs follow with great interest the EU initiatives concerning the mobility of workers in this particular sector.

The AEIP Task Forces dedicated to the construction industry consist of 3 individual working groups, namely:

- The Task Force Construction (TFC) which is dedicated to the complementary retirement provision for the workers of the construction industry.
- The Task Force Paid Holiday Schemes (TFPH) is led by SOKA BAU, and has 5 Members from 5 European countries. The members of the TFPH operate paid holiday funds which provide benefits both to domestic and posted workers. Paid holiday and paid holiday schemes are an integral part of the mandatory rules for minimum protection under Directive 96/71/EC. In accordance with the aim of this directive, the TFPH advocates for rules that guarantee both fair competition and the social protection of workers.
- The Task Force Health and Safety (TFHS): led by the Spanish Fundación Laboral, within this Task Force 5 Members from 5 European countries meet to share best practice and efforts to reduce occupational accidents. Preventive measures as well as vocational training are often on the agenda.



TF Construction, July 2011, Paris

These three Task Forces involve the participation of the European Social Partners of the construction sector (the European Construction Industry Federation – FIEC and the European Federation of Building and Woodworkers - EFBWW).

At the Healthy Workplaces European Summit 2011, the AEIP was awarded by the Agency for Occupational Safety and Health in Bilbao, a prize for EU-OSHA's latest Campaign partners. The prize was directly handed by László Andor, Commissioner for Employment, Social Affairs and Inclusion.

In 2011, the three Task Forces worked on a number of dossiers, legislative proposals, and common positions. In a glimpse:

#### **Enforcement of the Posting of Workers Directive**

Directive 96/71/EC of the European Parliament and of the Council of 16 December 1996, concerning the posting of workers in the framework of the provision of services, represents a topic of utmost importance for the Task Force Paid Holidays Scheme, whose Members shared information and were kept up-to-date on the inner developments of a directive proposal during the TFPH meetings. In 2012, the European Commission will publish a proposal for a directive on the enforcement of Directive 96/71/EC. This proposal will most probably affect existing national control mechanisms and thus hamper or

even make void the supervision of the compliance with mandatory minimum protection rules. The "Enforcement" Directive is therefore of particular interest for the Task Forces of the Construction sector.

#### **Directive Proposals on the Intra-Corporate Transfer and Seasonal Workers**

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 have been thoroughly analysed and discussed, together with the social partners FIEC and EFBWW during the meetings of TFC in 2011. These proposals could create a climate of unfair competition and lead to social dislocations in the construction sector.

#### **EU Capacity Building Project on Paritarian Funds in EU Eastern Countries**

In 2011 EFBWW and FIEC were awarded a grant from the European Commission for the implementation of the Project "Capacity Building for Setting up Paritarian Funds in Central and Eastern European Countries". Supported by AEIP, the project will involve three AEIP Members of the TF Health and Safety from France, Spain and Germany, who will provide expertise and knowledge on paritarian management to the social partners of the

construction sector of Bulgaria, Poland and Romania. This is the follow-up of a former conference held in Warsaw and Bucharest, supported by the European Commission in the framework of programmes and actions in the social and employment sectors.

#### **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 raising the standard of safety awareness in the construction industry, ensuring that site personnel undergo basic occupational health and safety awareness training with the view to prevention of accidents and avoidance of health hazards as well as providing all participants with a certificate that indicates that the holder has attended a basic course in health and safety.

Beside moral and legal reasons, a common approach concerning health and safety training is directly linked to the capability, economic efficiency, and thrift of companies, but also to mobility of workers. Europe needs a dynamic European labour market where people have the right skills for the right job and can move easily to find new opportunities. The outcome of the task force Health and Safety – the Code of Practice – lays down a way to further improve health and safety of the construction sector, as



The Task Forces of the Construction Sector have been active since 2001. They represent a meeting platform for European social protection schemes active in the construction sector, which is notably the one with the highest mobility of workers in Europe.

well as the economic success of construction enterprises and mobility of construction workers: A possible way towards a win-win-situation.

#### Developments at national levels

During the TFC meetings, several Members had the chance to discuss with each other on the recent and most sensitive issues related to the management of the financial crisis, the latest initiatives from their governments and their common concerns for EU initiatives. As an example, during 2011, AEIP delivered a memorandum outlining the benefits of collective mandatory schemes and the potential risk which could follow if the collective agreements which are protected by law are breached, as it was likely to happen in Ireland. The request to draft such a memorandum was made by AEIP Task Force Construction Members, in particular by CWPS, the Irish Construction Workers Pension Scheme, Cordares (NL), SOKA BAU (DE) and AEIP's American Partners NC-CMP, which helped in defending and supporting these mandatory collective schemes.

#### Relations with the Social Partners of the Construction Sector

The works of these three task forces are followed-up and supported by the Social Partners of the Construction Sector, FIEC and EFBWW. In 2012 AEIP will support them in the implementation of the aforementioned Capacity Building Project.

#### 4.2 TERRITORIAL AND SOCIAL PROTECTION SCHEMES

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

This Working group organises regularly conferences in Venice with the Veneto Region Government.

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 investment policies chosen by the pension funds, it should be considered the use of their financial re-

sources for local investments on their territories.

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.

#### AEIP Conference: "The local investments of the territorial social protection schemes in Europe"

On 11 November 2011 in Venice, AEIP organized the 8th annual conference on Local Investments of Territorial Pension funds.

In the last years several local pension funds were set up by the social partners in Regions and other Departments of Europe. Sometimes, even the local Governments contributed to set up these local pension funds by offering financial contributions, fiscal advantages or by providing other supports.

The goal of the conference was to discuss the opportunities, challenges and possible solutions for the local investments of the territorial/regional pension funds.

The conference gathered representatives from the Business Sector, Paritarian Institutions as well as regional authorities from Veneto Region in Italy and other neighbour regions.

## 5 | Lobby at European Level



### 5.1 ADVOCACY ACTIVITIES

#### **IORP II: the thorough responses to the EIOPA Call for Advice**

In 2011 AEIP delivered two responses to the EIOPA consultations concerning the European Commission's Call for Advice on the Review of the Directive 2003/41 ('IORP Directive'). AEIP responded to more than 100 questions on many different aspects of pension funds, ranging from prudential rules and capital requirements to governance and social and labour law.

AEIP is also represented in the EIOPA Occupational Pension Stakeholder Group through its Secretary General, Bruno Gabellieri, who provided his contribution to the group opinion on the review of the mentioned Directive.

After delivering its own press release, AEIP also joined forces with 7 other top-level organisations in delivering to the press a joint statement on the major concerns related to the review of the IORP Directive currently carried out by the European Commission with the technical advice of EIOPA. The statement was jointly written with the Social Partners (BUSINESSEUROPE, ETUC), industry representatives EFRP, UEAPME and CEEP and various other organisations. It was thus mentioned by several newspapers, i.e. the Financial Times, IPE, Professional Pensions, European Pensions.

#### **White Paper: the view of the European Commission on Pensions in Europe**

AEIP has thoroughly analysed the definitive version of the long-awaited EC White Paper on Pensions, published in early 2012, and delivered a press release then mentioned in top European media.

AEIP has welcomed the fact that the EC has taken a comprehensive approach towards such a sensitive and complex theme, which touches upon macroeconomic and demographic balances, living and employment conditions and aims at tackling the challenges Europe will face in the next decades without sacrificing the main features of the European social (and economic) model. However, AEIP is quite critical of some initiatives that are anticipated by the European Commission, especially for the 2<sup>nd</sup> pillar pensions.

#### **Written declaration on EU-age friendly environment**

Upon the request of AGE-Platform, AEIP committed in lobbying MEPs for a Written Declaration to promote an EU-age friendly environment. The declaration was launched by Claude Moraes (UK, S&D), Kinga Göncz (HU, S&D), Martin Kastler (DE, EPP), Jean Lambert (UK, Greens), and Cecilia Wikström (SV, ALDE) on 30th November 2011. In order to adopt by the European Parliament the Written Declaration as an official position, at least 369 signatures were required over a period of 3 months.

#### **AEIP response to the Single Market**

AEIP responded to the European Commission's Communication "Towards a Single Market Act" on the request of its Members SOKA-BAU and BUAK. In its response AEIP expressed its concern with proposal n° 30 which states "the Commission will adopt a legislative proposal aimed at improving the implementation of the Posting of Workers Directive, which is likely to include or be supplemented by a clarification of the exercise of fundamental social rights within the context of the economic freedoms of the single market."

#### **The European Commission: where the rules are conceived**

Throughout 2011 AEIP welcomed several officials of the European Commission to its meetings, both at task force and technical committees' levels. The topics discussed related to a number of themes, ranging from pension portability, to the extension and amendment of the coordination of the national social security systems and to the mobility of workers.

#### **Pension Forum of the European Commission**

AEIP is regularly invited to the pension forum of the European Commission. In 2011, Francesco Briganti, Director of AEIP, represented the association in the Pension Forum.



AEIP representation at EU-level through close cooperation with the European Commission, the European Parliament and the Social Economic Committee.

### European Parliament

The European Parliament is a key player in EU legislative process. In 2011, AEIP strengthened its relationship with the European Parliament through meetings with MEPs and Policy Advisors, especially on matters of workers mobility and active ageing and long term care. It also attended several seminars, political group meetings and public hearings. This includes the Social Economy Intergroup, Trade Union Coordination Group, Intergroup on Health and Consumer Protection and the Intergroup on Ageing and Intergenerational Solidarity. AEIP also strengthened its relationship with Members of the European Parliament's Committees on Employment and Social Affairs, Civil Liberties, Justice and Home Affairs.

## 5.2 PARTNERSHIPS

### 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).

In April 2008, supporting the suggestion made by the coalition, the Slovenian Presidency of the European Union proposed the date of 29 April as the European Day of solidarity and cooperation between genera-

tions. The first EU Day was officially launched on 29 April 2009.

### Brochure on intergenerational solidarity

To mark the 2<sup>nd</sup> European Day in 2010, the coalition published a joint brochure to demonstrate the relevance of intergenerational solidarity in different policy frameworks. This brochure is a series of proposals from the coalition showing that in all policy fields intergenerational solidarity is a tool needed to achieve social cohesion and it can successfully address the demographic challenges facing the EU. Notably, AEIP was able to participate in drafting the section on Co-ordinated Retirement Schemes and Occupational Pensions. For the 3<sup>rd</sup> European Day in 2011, the brochure was revised and is used for the purpose of the European Year 2012 on active ageing and Solidarity of Generation.

### The European Year 2012 on healthy ageing and solidarity between generations

The Coalition also committed in a strong lobbying for the European Year 2012 on Solidarity between generations. Consequently, in May 2011, the Council and the European Parliament agreed on the title, concept and the budget for the year 2012. The concept of the European Year 2012 on 'Active ageing and solidarity of generation' is the European culture of active ageing. The main pillars are the solidarity between generations, maintaining vitality and respect for the dignity of human beings.

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

The Roadmap aims at showing firm commitments of our organisations and our Members to support the objectives of the EY 2012. The Roadmap was disseminated at a Conference launching the EY 2012, on the 18th January 2012 in Copenhagen.

The Manifesto outlines the Coalition's vision of a society for all ages and what we would like others to do to foster participation of older people and create an age friendly environment across the EU. On one hand, this document is a political one and stresses the Coalition's recommendations in one page max. On the other hand it also helps reach the general public and raise awareness.

### Partnership with the Association Internationale de la Mutualité (AIM)

AEIP works in partnership with AEIP on issues related to long-term care within a joint-working group chaired by representatives from AEIP (Mr. Bruno Gabellieri) and AIM (Ms. Rachelle Kaye). For more information please look at the health and Care chapter of the Activity Report.

To strengthen the partnership, representatives from AEIP and from AIM cooperate regularly to better define common interest and possible areas of cooperation.

## 6 | Lobby at the Transatlantic Level

Since November 2010, AEIP officially applied to be a part of the International Labour Conference (ILC), which is a two weeks long event hosted by the International Labour Organization (ILO).

The International Labour Organization is United Nations' specialized agency which seeks to promote social justice and internationally recognizes human and labour rights. The International Labour Conference of the ILO meets in Geneva every June and recommendations and decisions on the ILO's general policy, work programme and budget are adopted. At the conference each member state is represented by four people: two government delegates, an employer delegate and a worker delegate. Moreover, representatives of non-governmental international organisations which have established a consultative relationship may attend the conference. Consequently during 2011 AEIP continued that achievement and have been cultivating and developing this relationship.

### AEIP-NCCMP-MEBCO JOINT CONFERENCE: NEW YORK

On 08 – 10 June 2011, in New York, AEIP co-organised the 3<sup>rd</sup> 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 Multi-employer Benefit Plan Council of Canada (MEBCO).

The Transatlantic conference is organized in Europe every other year, and in 2011 it took place in New York.

Thanks to our protocol with North-American Partners, we work closely with Assistant Secretary to President Barack Obama' cabinet, Ms. Ph. Borzi, who worked on the Affordable Care Act 2010. We welcome to the conference high level decision-mak-

ing authorities from both sides of the Atlantic Ocean.

This annual conference brings together social protection institutions, government representatives, social partners, banking representatives and industry employees from both sides of the Atlantic, to discuss the current situation in the USA and Europe and the possible solutions to be implemented. In 2011, the conference was faced with a theme on "The Fiscal Crisis and its effects on the Future of Multiemployer/Paritarian Benefit Programs".

Thanks to our protocol with North-American Partners, we work closely with Assistant Secretary to President Barack Obama's cabinet, Ms. Phyllis Borzi, who worked on the Affordable Care Act 2010. We welcome to the conference high level decision-making authorities from both sides of the Atlantic Ocean.



Ms Phyllis Borzi, Assistant Secretary U.S. Department of Labor, Employee Benefit Security Administration



# Members \*

## Associate Members

|   |   |  |  |  |
|---|---|--|--|--|
| <br>Austria  | <br>Belgium  | <br>Finland       | <br>France        | <br>France      |
| <br>France | <br>France | <br>Germany     | <br>Germany     | <br>Luxemburg |
| <br>Italy  | <br>Italy  | <br>Netherlands | <br>Switzerland |  |

## Observers

|  |  |   |  |
|--|--|---|--|
| <br>Finland       | <br>Ireland     | <br>Italy          | <br>Italy |
| <br>Liechtenstein | <br>Romania     | <br>Spain          | <br>Spain |
| <br>Switzerland   | <br>Switzerland | <br>United Kingdom |  |

\* as of 30/06/2012

# Members \*

## Correspondents

|   |   |   |   |
|---|---|---|---|
|    |    |    |    |
| Bulgaria  | France  | France  | France  |
|  |  |  |  |
| France  | Greece  | Greece  | Hungary (ONYF)  |
|  |  |  |  |
| Latvia  | Poland  | Spain (CNEPS)   | United Kingdom  |

## Partnership

|   |   |
|---|---|
|  |  |
| Canada  | United States   |

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.

\* as of 30/06/2012

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

|   |   |  |   |   |
|---|---|--|---|---|
| <br>Belgium       | <br>Finland*       | <br>France        | <br>France*  | <br>France (HPGM)  |
| <br>France*      | <br>France*      | <br>France*     | <br>France | <br>France*      |
| <br>Ireland      | <br>Italy*       | <br>Italy*      | <br>Italy   | <br>Netherlands* |
| <br>Netherlands* | <br>Netherlands* | <br>Spain (MGC) |   |   |

\* Members of members

## 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:

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

\* 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.



**PRESIDENT**  
Mr. Peter Huber  
SOKA BAU

Germany



**VICE PRESIDENT**  
Mr. Gerard Riemen VB

The Netherlands



**TREASURER**  
Mr. Renato Guerriero  
DEXIA

Luxemburg



**SECRETARY OF THE BOARD**  
Mr. Bernd Merz  
BG BAU

Germany

## AEIP Secretariat

**Bruno Gabellieri**  
Secretary General  
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

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

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

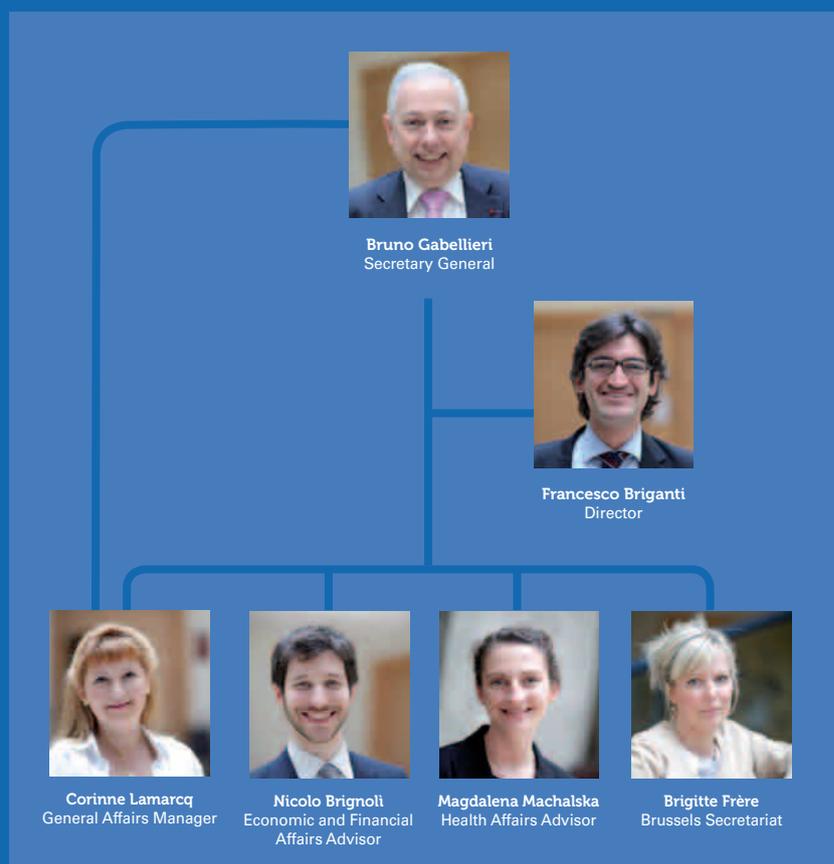
**Task Force(s)**  
Health and Care Sector; Health & Safety at work

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

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

**Brigitte Frère**  
Brussels Secretariat  
secretariat@aeip.net

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



## SIÈGE SOCIAL | HEADQUARTER

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### AEIP MISSION

“To serve the society and protect the citizens by promoting the paritarian management of social protection”

### AEIP VISION

“A world in which employers and employees manage the social protection institutions with full transparency and solidarity”

### AEIP VALUES

“These values serve as guidelines for our conduct and behaviour as we work towards our vision:

- Balanced representation of employers and employees
- Solidarity
- Transparency

### DEFINING “PARITARIAN”

“Paritarian” is derived from the French “paritaire” and means jointly managed on an equal basis. The roots of the paritarianism go back to the 19th century but until 20 years ago, the incentives to develop a pan-European paritarian framework have not been conclusive. In the field of social protection, paritarian institutions are non-profit bodies, jointly managed by social partners. The governance of the paritarian institutions is based on the equal representation of both employers and employees. Paritarian institutions manage social protection funds set up through collective agreements at the company, the industry-wide or the inter-sectoral level and they can provide a series of social benefits like pensions, health insurances, paid holidays, unemployment and disability.

The combined funds managed by the paritarian institutions across Europe raise up to 1.3 trillion euro in assets and cover about 80 million people.

More information on our documents/press releases can be found on [www.aeip.net](http://www.aeip.net)