

PRELIMINARY AGENDA

INTERNATIONAL CONFERENCE

**“Pan-European Personal Pension Product (PEPP) –
Regulation and Technical Standards towards market realization”**

**Under the patronage of the Chair of the Financial Supervision Commission
Mr. Boiko Atanasov**

29-30 October 2020, VUZF, Main Ceremonial Hall
Sofia city

DAY 1

8.30 – 9.30 Registration and coffee impulse

9.30 - 10.15

Opening

Prof. Dr. Grigoriy Vazov, Rector of VUZF University

Mr. Boiko Atanasov, Chair of the Financial Supervision Commission

Mrs. Mariana Nikolova, Deputy Prime Minister for Economic and Demographic Policy of the Republic of Bulgaria

10.15 - 10.40

Keynote speech

The PEPP: where we stand (Technical Standards and Level 2 legislation)

Ms. Sandra Hack, Principal Expert on Financial Stability

EIOPA

10.40 – 12.00 FIRST PANEL: The role of the Technical Standards and the Level 2 legislation for the Pan-European Personal Pension Product (PEPP) market realization.

Panelists: Matti Leppala PensionsEurope, Nicolas Jeanmart InsuranceEurope, Prof. Bernard Delbecque European Fund and Asset Management Association, and scientific researchers

Moderator: Prof. Dr. Virginia Zhelyazkova, Vice Rector VUZF

Scientific reports

PEPP from an Asset Manager Perspective

Prof. Michele Siri

The University of Genoa

Economic perspectives from PEPP market realization

Prof. Andrea Minto

Ca' Foscari University of Venice

PEPP from a Bank perspective

Prof. Nicolas Raschauer

The University of Liechtenstein

12.00 - 12.30

Questions and Discussion

12.30 – 13.20

Lunch Break

13.20-13.40

Keynote speech

Basic PEPP – safe, transparent and cost-efficient product

Assoc. Prof. Stanislav Dimitrov, Director of research unit „Insurance and Pensions“, VUZF Lab

13.40 – 16.00 SECOND PANEL: The Pan-European Personal Pension Product (PEPP) – true retirement savings product.

Panelists: Representatives from Ministry of Finance, Financial Supervision Commission, Falco Valkenburg Actuarial Association of Europe, Dr. Francesco Briganti CBBA Europe, Cross Border Benefits Alliance and scientific researchers

Moderator: Assoc. Prof. Dr. Stanislav Dimitrov, VUZF

Scientific reports

PEPP design and distribution

Prof. Pierpaolo Marano

Università Cattolica del Sacro Cuore - Milan and University of Latvia

Building PEPP Consortia: Who Does What

Prof. H. van Meerten

The University of Utrecht

Ralph Richards

M&R Partners GmbH

Switzerland

The PEPP in the wider context of the EU initiatives on pan-European and cross-border pensions

Dr. Francesco Briganti

CBBA Europe

16.00-16.30

Questions and discussion

16.30-16.40

Wrap-up Day 1

Assoc. Professor Stanislav Dimitrov

VUZF

16.40 – 17.30 Networking cocktail

DAY 2

9.00 – 9.30 Coffee impulse

9.30-10.00

Keynote speech

The trade-off in PEPP design and distribution

Prof. Claudio Tebaldi

Università Commerciale L.Bocconi, Milano

10.00 – 11.30 THIRD PANEL: The customer in the centre of the long-term retail savings and investment products.

Panelists: Representatives from Association of Bulgarian Insurers, Bulgarian Association of Supplementary Pension Security Companies, Yavor Achev Amundi Asset Management, Martin Parkes BlackRock and scientific researchers

Moderator: Assoc. Prof. Dr. Radostin Vazov, Vice Rector, VUZF

Keynote speech

Financing the health system - problems and challenges

Assoc. Prof. Dr. Radostin Vazov, Vice Rector, VUZF

Scientific reports

Asset management strategies of personal pension plans – the experience of Israel

Dr. Elroi Hadad

Holon Institute of Technology (H.I.T), Holon, Israel

Protection mechanisms for consumers of secondary and third pillar pension products

An Wouters

PhD candidate, The University of Utrecht

Jorik van Zanden

PhD candidate, The University of Utrecht

Selling personal retirement products through bank channel

Gichka Arnaudova

PhD candidate VUZF

Payment solutions for long-term retail savings and investment products

Tanya Genova

PhD candidate VUZF

11.30 – 12.00

VUZF study on the potential savers attitudes towards PEPP

Results presentation

Assoc. Professor Stanislav Dimitrov, Director of research unit „Insurance and Pensions“, VUZF Lab

12.00 – 12.30

Questions and discussion

12.30-13.20

Lunch Break

13.20 – 16.00 FOURTH PANEL: The holistic approach to the risk assessment and management of long-term retail savings and investment products.

Panelists: Representatives from Association of Bulgarian Insurers, Bulgarian Association of Supplementary Pension Security Companies, Ministry of Finance, Financial Supervision Commission, Asset Management companies and young scientific researchers

Moderator: Assoc. Prof. Dr. Yulia Dobрева, Director of research unit „Economics“, VUZF

Lab

Keynote speech

ESG Factors Application in Personal Saving Products

Prof. Dr. Virginia Zhelyazkova, Vice Rector VUZF, Director of research unit “Finance and Financial Management”, VUZF Lab

Scientific reports

European Regulatory Framework for personal pension insurance

Assist. Professor Judith Sild

The University of Liechtenstein

The role of the information documents in personal savings products – Key information document and Benefit statement

Dr. Jivka Nikolova

Bulgarian Academy of Science

Investment results of personal pension schemes

Dr. Nikolina Mareva

VUARR

Distribution channels of personal savings products

Nikola Dimitrov

PhD candidate VUZF

Innovation in personal savings products

Mihaela Mihaleva

PhD candidate VUZF

What can help us the existing experience in saving in retirement products

Borislava Iribozova

VUZF

14.30 – 14.50

Coffee Break

16.00 - 16.30

Questions and discussion

16.30 – 17.00 Conclusions from the conference – common standpoint, adoption of conclusive document

Note: The official conference language will be English, simultaneous interpreting will not be provided.