



Company Profile

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20 Years of Experience

Itinerari Previdenziali is an independent organization that has been operating for 20 years in the field of research, training and information related to public and private welfare and social security systems. Its aim is to promote the social security, welfare and supplementary health care culture.

To this end, it targets both the general public through awareness-raising and literacy initiatives as well as policy makers and experts to feed the debate and provide valuable insights into the various areas of the social security system.

Activities of Itinerari Previdenziali

To achieve its mission, Itinerari Previdenziali organizes and promotes:



studies, research and in-depth articles devoted to the analysis and monitoring of public and supplementary *welfare*, pension and health care systems;



conferences and workshops, important networking opportunities that foster the circulation of ideas and best practices while strengthening mutual knowledge among the main players in this sector;



dissemination and training activities, such as tailor-made training projects for stakeholders together with information and literacy initiatives on social security issues to promote a 360° protective approach against future contingencies.

Since the very beginning of its activity, Itinerari Previdenziali also organizes in collaboration with some of the most important Italian universities masters which, over the years, have made it possible to train dozens of professionals in the field of social policies.



THE TEAM

Study and Research Centre and Scientific Technical Committee

The consistent research and analysis of the Italian economic and social situation and the scientific supervision of the contents for conferences, workshops and dissemination projects are entrusted to the **Itinerari Previdenziali Study and Research Centre**; it is a qualified group of internal researchers, supported by consulting professors, experts and technical advisors from companies and organizations with proven knowledge of the different and complementary social security systems.

In order to identify new research areas and to consistently innovate the monitoring and analytical methods for this sector, the Study and Research Centre is supported by a **Technical and Scientific Committee**, a body with consultative and policy functions, composed of highly experienced aca-



Alberto Brambilla

Itinerari Previdenziali Study and Research Centre President

Undersecretary of State at the Ministry of Welfare with responsibility for "Social Security" from 2001 to 2006 and author of several regulatory measures, including Legislative Decree n. 252/2005 on complementary pension schemes and former President of the "Nucleo di Valutazione della Spesa Previdenziale" (Nuvasp) at the Ministry of Labour; in 2007, he founded "Itinerari Previdenziali" and coordinates and chairs its Study and Research Centre.

THE TEAM

Marketing, communication and organization of events

Finally, a **team of marketing, communication and event organization professionals** work together with the Study and Research Centre and the Technical and Scientific Committee in order to best implement the Itinerari Previdenziali projects; in fact, they are able to identify emerging trends and the most effective communication methods to capture the needs of their target audience; they manage relations with entities, institutions and authorities and coordinate meetings, workshops and dissemination projects.



Research and Publications

Using **long-term proprietary databases** as well as data obtained from collaborations with national and international entities and institutions, the experts of the Itinerari Previdenziali Study and Research Centre carry out studies, **surveys and scenario analyses** that investigate how the Italian pension and welfare system works and how assets are managed by institutional investors as well as their socio-economic, legal and fiscal trends. Among the Itinerari Previdenziali main publications, **all made available for free consultation on the Itinerari Previdenziali website**, we would like to mention in particular:



the Report on Italian Pension System which is an ideal follow up of the publications produced by Nucleo di Valutazione della Spesa Previdenziale up to 2012. This annual Report provides a detailed overview of the financial and social sustainability of the Italian pension system, reclassifying its expenditure within the broader system of National Accounts;



the Report on Italian Institutional Investors which provides an annual analysis of members, resources and managers of Occupational and Pre-existing Pension Funds, Pension Schemes, Banking Foundations, Supplementary Health Care funds and Insurance Companies;



The Observatories on Public Expenditure and Labour Market as a follow up of the important analysis and monitoring activity already initiated with the Report. They provide major insights into some specific relevant issues (new legislation, statistical projections, historical series, etc.) to assess both the adequacy of benefits and the medium-long term sustainability of the Italian social security system;



The Notebooks on the Silver Economy and Sustainable Investment Policies which, through surveys and stakeholder analysis, investigate some trends of primary interest for institutional players and all subjects related to the universe of the Italian welfare mix.



Workshops, Seminars and Conferences

The surveys and studies carried out by Itinerari Previdenziali are not only designed to deepen the research interests autonomously identified by its Study and Research Centre, but also to respond to the inputs of Entities, Foundations and other market operators; all these research data **are shared and analysed in-depth during conferences, seminars and workshops.**

These events feature the participation of Italian institutional investors, product developers, managers and advisors, but also media interested in the insights coming from the high-level discussion of these themes, policy makers and social partners; they are all invited **to discuss and formulate concrete proposals for the renewal of the sector.**

Moreover, opinion leaders in this field and experts of the Study and Research Centre participate as speakers and guests at institutional, media and other events promoted by other entities; they share their skills and expertise to actively contribute to the debate within this sector and draw attention to the most pressing issues within the vast panorama of the supplementary welfare system.



Social Security Information and Dissemination

Itinerari Previdenziali launched and promoted the National Social Security and Labour Day, with a wide range of **training and professional initiatives** designed to promote the social security culture in its broadest sense in the public domain.

To this end, special attention is attached to youths, so that young people can already have all the information and tools they need to plan their future in a responsible manner, but also to families, workers and older individuals. In fact, Itinerari Previdenziali and its Study Centre devote meetings and workshops to **promote a conscious approach to the themes of labour, social security and public and supplementary health care.**

The information blog ilPunto

ilPunto is an independent information blog which collects, under the scientific supervision of Centro Studi e Ricerche Itinerari Previdenziali, news and opinions on relevant pension, welfare, healthcare, insurance, economic and financial topics, as well as contributions designed to fuel the scientific debate with stakeholders.



www.itinerariprevidenziali.it

A meeting space where it is possible to look up the Cambi&Bandi section, a reference for all operators who want to be updated on appointments, investments, call for tenders and all Italian institutional Market developments.





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