spainsif

social investment forum

Strategic plan 2016-2018

Incorporation

In 2009, 32 organizations decide to establish the association, with the primary mission of fostering the environmental, social and corporative governance criteria in the investment policies in Spain, by means of the dialogue with the different social groups and contributing to the sustainable development. **Currently 58 associates.**

¿Why Spainsif?

Meeting platform

Reference

Generate and disseminate knowledge

Raise awareness and promote changes in investment policies

Statutory mission

The association's primary mission is to foster the integration of environmental, social, and corporative governance criteria in the investment policies in Spain by means of the dialogue with the different social groups and contributing to the sustainable development.

The association aims to be a meeting and reference platform to generate and disseminate knowledge on Socially Responsible Investing (SRI from now on), as well as to raise awareness and drive changes in the investment processes in the investment community, the Public Administration, the companies and the citizenship in general.

For that purpose the Association is inspired by responsibility, transparency, sustainability, commitment, trust, plurality and independency values.

Associates list (56)

GROUP 1: Financial Institutions (11).

- BBVA, BANCO POPULAR, BANKIA, TRIODOS BANK, CECA, ATLANTIS COMPAÑ
ASEGURADORA, CAIXA DE CREDIT DELS ENGINYERS, PETERCAM ESP, BANCO
CREDITO COOPERATIVO (GRUPO CAJAMAR), INSTITUTO DE CREDITO OFICIA
(ICO), SEGUROS RGA.

GROUP 2: Asset Managers (18).

- CASER, FONDITEL, SANTANDER A.M., PICTET, IBERCAJA, GROPAMA A.M
AMUNDI IBERIA, ROBECO, NATIXIS G.A.M., GENERALI IE, LAZARD F.G,
TRESSIS,
AMBAR CAPITAL (VIVERGI), NORDEA PENSIONES, EDMOND DE ROTHSCHILD,
BNP PARIBAS I.P., ETICA PATRIMONIOS EAFI, ROBUST G.I.

GROUP 3: SRI Service Providers and related Academic Centers (12).

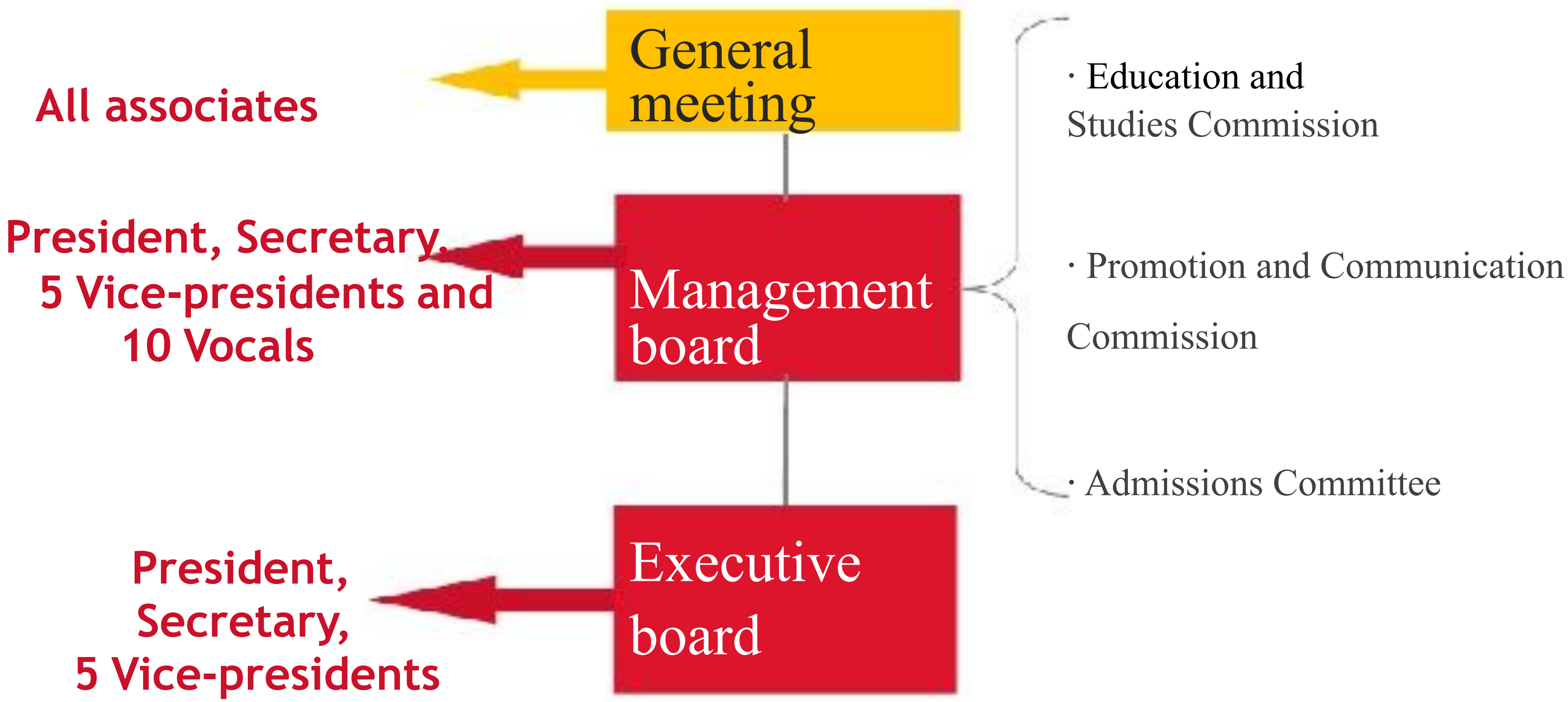
- VIGEO, NOVASTER, SUSTAINALYTICS, CPPS, INSTITUTO DE EMPRESA B.S. , U
DEUSTO B.S., M.S.C.I., VDOS, GAWA CAPITAL, FEF, MORNINGSTAR.

GROUP 4: Nonprofit Organizations (15).

- ESF, ECODES, FETS, AECA, FORETICA, CREAS, AERI, CDP, FUNDACION ISIS,
FUNDACIÓN AFI, U. JAUME I., FUNDACIÓN ONCE,
OCOPEN, ASGECO, FUNDACIÓN MÁS FAMILIA.

GROUP 5: Trade Unions (2). CCOO, UGT .

Structure


All associates
General meeting
President, Secretary, 5 Vice-presidents and 10 Vocals
Management board
President, Secretary, 5 Vice-presidents
Executive board
· Education and Studies Commission
· Promotion and Communication Commission
· Admissions Committee

Structure

Executive Board

- Presidency → Forética
- Financial institutions → Bankia
- Asset Managers → fonditel Pensiones
- Providers And Academy → Novaster
- Nonprofit organizations → Creas
- Trade unions → UGT
- Treasurer → Novaster

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Strategic Lines

In order to achieve its objectives, the association will have the following strategic action lines:

1. The SRI promotion to generate demand and supply in Spain for which the following activities will be carried out :

a) SRI diffusion through educative and/or information campaigns on SRI. Development of publications and other services.

b) SRI research promotion in collaboration with Universities, Business Schools and Institutions.

c) Collaboration with stakeholders fostering the cooperation with the international SIF network and other organizations interested in adopting responsible investment practices .

Strategic Lines

Strategic Plan Lines 2016-2018

Promotion

- Annual event
- SRI week
- Business breakfasts
- SRI Observatory
- Communication plan
- Network and web relevance
- **Retail market**

Institutional relevance

- Relationship with the administration
- Relationship with regulatory bodies
- Relationship with the media
- Relationships with other stakeholders

Research and y education

- Own research
- Eurosif research
- Collaboration with universities
- **Specific action to boost education and research**

Strategic Lines

Specific lines of action: Strategic Plan 2016-2018

SRI Retail Promotion

Actions from the Supply	Actions from the Demand
·Meetings with regulatory bodies and supervisors. ·Fair with exhibitors and conferences. ·Internal diffusion and formation. ·Commitment to promote the associates' SRI offer. ·SRI visibility in the media, communication reinforcement.	·Initiatives with representative associations of the demand. ·Joint acts with other organizations whose target is the investor or the individual saver. ·SRI visibility in the media, communication reinforcement. ·Socially Responsible financial education. ·Specific media campaigns with the Consumer Associations.

Strategic Lines

Specific lines of action: Strategic Plan 2016-2018

Research and Education Boost

Actuations
§ Agreements with Universities and Business Schools. § Cross training for professionals. § Research initiatives in teaching centers. § Financial Education Plan Development. § SRI Education Practices. § SRI Module for Universities and Business Schools.

The Education and research are fundamental activities for the development of SRI, given that it affects the supply and the demand.

International Presence

- Member of Eurosif’s Board.
- Participation in Eurosif’s studies at European level.
- Participation in Eurosif’s European normative consultation groups on SRI.
- International Networking (Global Sustainable Investment Alliance).
- Collaboration with VBDO (Ditch SIF) in research studies.
- Collaboration with FIR (French SIF). Participation in events.
- Collaboration with UKSIF (British SIF). Participation in events.
- Collaboration with FNG (German, Austrian and Swiss SIF).
- Agreement with TBLI.
- Agreement with UN-PRI (Speakers in the annual event).

European SIF's Association: Eurosif

SIFs Global Network

European SIFs:

BELSIF

FINSIF

DANSIF

FIR FORUM POUR L'INVESTISSEMENT RESPONSABLE

SWESIF SVERIGES FORUM FÖR HÅLLBARA INVESTERINGAR

FNG

UKSIF

norsif

Forum per la Finanza Sostenibile

VBDO

SIFs Global Network

SIFs outside Europe:

ASrIA

US SIF
The Forum for Sustainable and Responsible Investment

SOCIAL INVESTMENT FORUM JAPAN

riaa

AFRICASIF.ORG

SiO
Social Investment Organization

China SIF
中国责任投资论坛

kosif
Korea Sustainability Investing Forum

spainsif

social investment forum

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