



Swiss
Sustainable
Finance

Buenos Aires Burcap	30792	0.00%	▸
CAC 40	4538	-2.46%	▾
DAX	9990	-2.63%	▾
DJ Bahrain Index	110	0.00%	▸
ESTX50 EUR P	3179	-2.76%	▾
DJ Industr Average	16171	-2.16%	▾
STX50 EUR P	3013	-3.14%	▾
QE Index	0	0.00%	▸
FTSE 100	6055	-3.09%	▾
Hang Seng	21185	-2.24%	▾
Korea Comp Index	1914	-1.40%	▾
NASDAQ 100	4208	-1.55%	▾
Nikkei 225	18890	0.00%	▸
Shanghai A Index	3318	-1.22%	▾
Shanghai B Index	287	-4.44%	▾

58.55	-1.26%	▾	Partners Grp Hldg N	305.50	-2.16%	▾	PAX Anlage N	0.00	0.00%	▸	SPI
20%	▾	Zurich Insur Grp N	259.50	-2.33%	▾	SMI	8599	SMI			

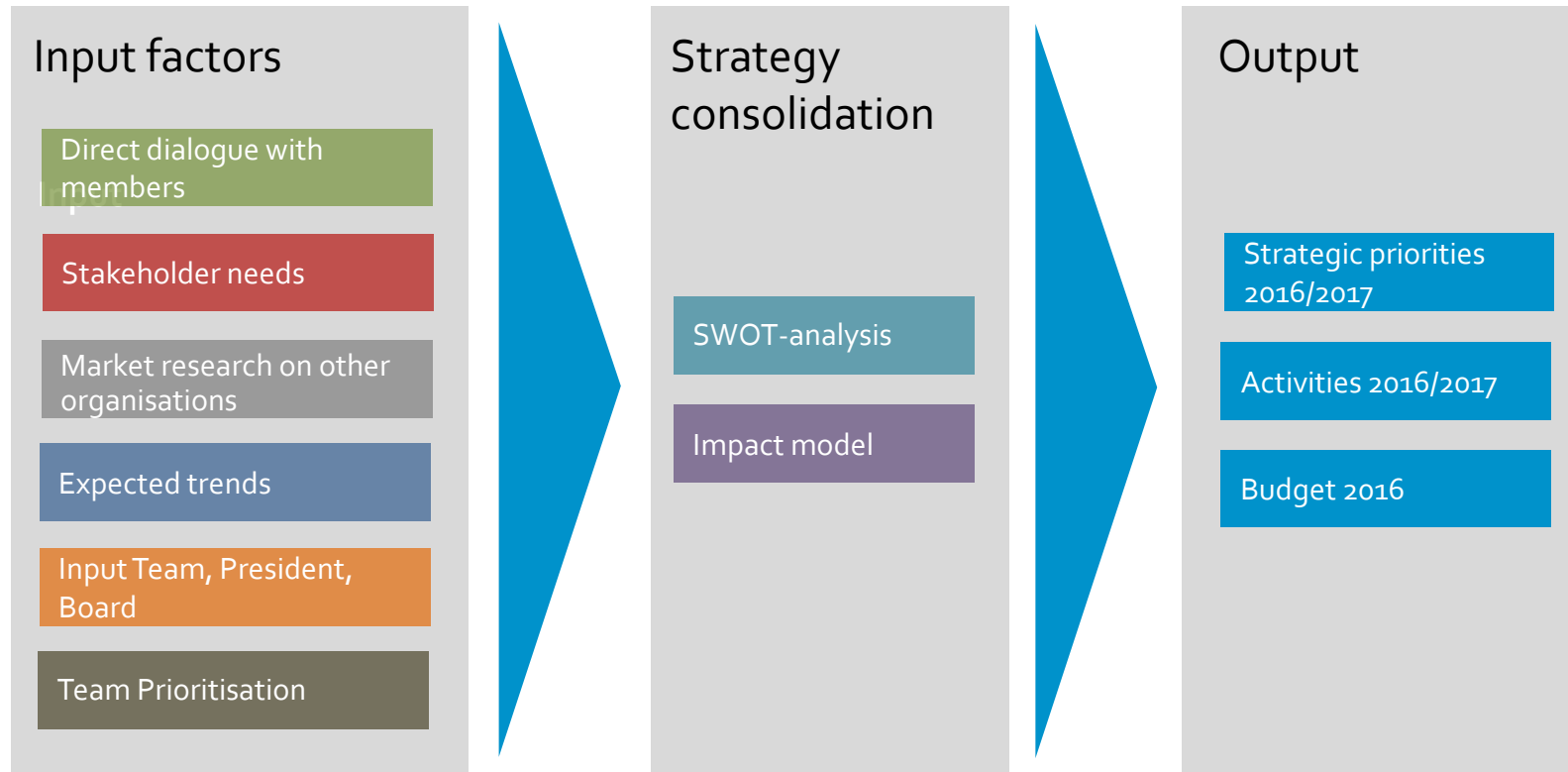
Swiss Sustainable Finance – Strategy 2016/2017

Zürich, 14 December 2015

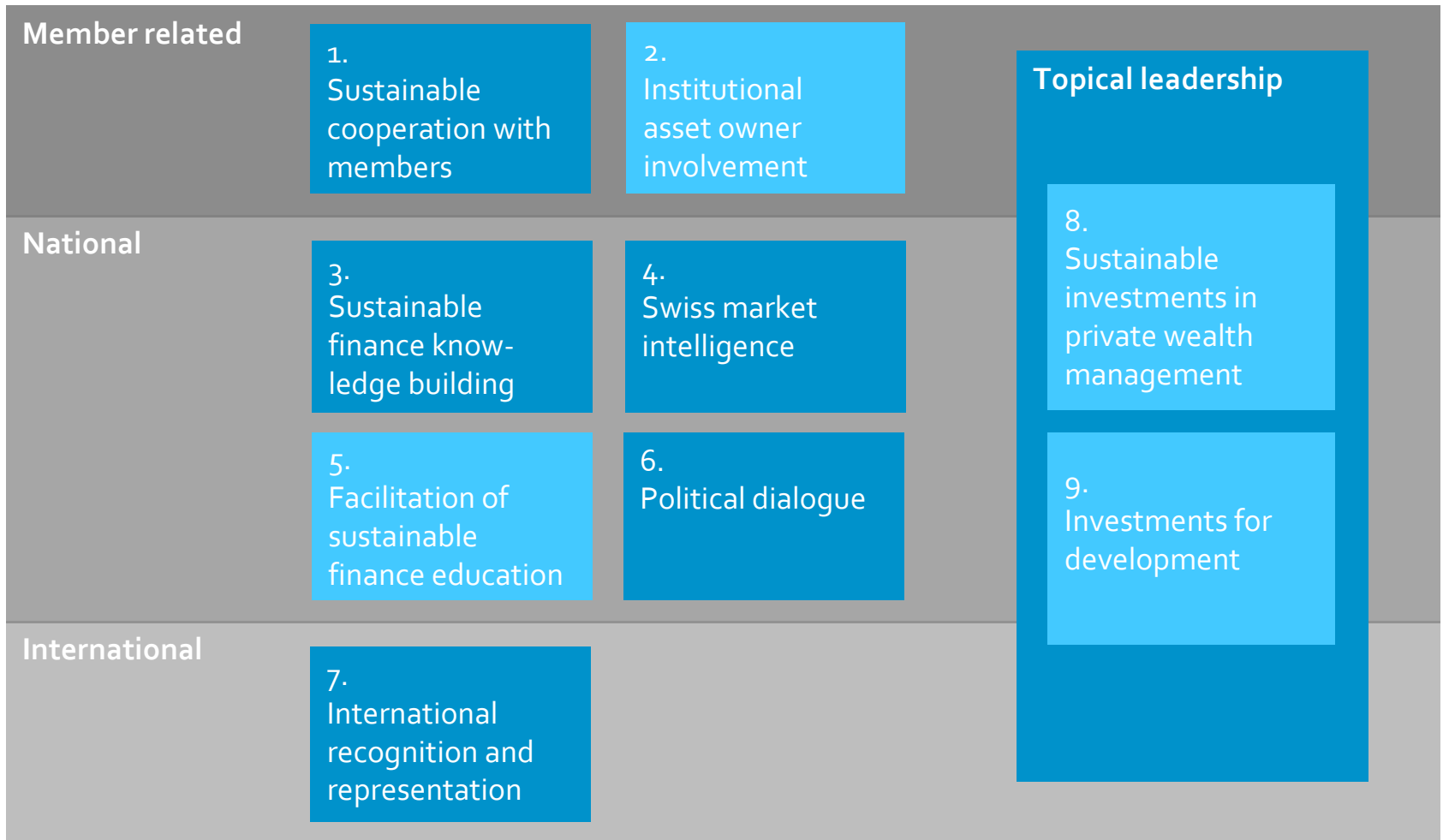
Introduction: SSF strategy 2016/2017

- Starting point summer 2015
 - SSF can look back on successful 16 months of existence with many activities started
 - Sustainable finance gains traction in Switzerland
 - Members express broad and varied expectations
- SSF team elaborated draft strategy based on solid process
 - 2 Team workshops
 - Assessment of stakeholder needs
 - Development of Impact Model
 - Definition of potential strategic priorities
- Board prioritized strategic priorities and defined strategy for 2016/2017

Process to define SSF strategy 2016/2017



Strategic priorities for 2016/2017



No	Dimension	Priority name	Description	Objectives
1	Member-related	Sustainable cooperation with members	Creating a working model that assures dynamic relationships with members with tangible results, covers member needs, and attracts new members	<ul style="list-style-type: none"> • Sustain long term memberships and resources • Build effective SF industry and networks in CH
			Planned activities (examples): <ul style="list-style-type: none"> • Strengthen cooperation in workgroups through better workgroup model and more visibility for workgroup leaders • Improve internal communication • Develop additional funding models (beyond member's contribution) 	
2	Member-related	Involvement of institutional asset owners (IAO)	Attraction of major Swiss pension funds, insurance companies and foundations as members of SSF	<ul style="list-style-type: none"> • Establish SSF as a credible organization for institutional asset owners • Favour understanding of and increase in demand for SF products and services
			Planned activities (examples): <ul style="list-style-type: none"> • Prepare Toolkit on sustainable investors for institutional asset owners • Build on Toolkit work and provide practical guidance on implementation • Expand institutional asset owner members base 	
3	National	Sustainable finance knowledge building	Promote sustainable finance (SF) through active media work, events and publications.	<ul style="list-style-type: none"> • Increase knowledge on SF and convince different players of opportunities it offers for them, the Swiss financial centre and Switzerland
			Planned activities (examples): <ul style="list-style-type: none"> • Active media work (regular media relations, regular press releases, place articles) • Events: SSF organizes own events, takes opportunities for joint events and is present at third party events 	
4	National	Swiss market intelligence	Provide Swiss SF market information both on the level of market data as well as on general trends in SF.	<ul style="list-style-type: none"> • Establish SSF as THE knowledge hub on SF both for focus Swiss studies and international studies
			Planned activities (examples): <ul style="list-style-type: none"> • Publish market data on Sustainable Finance in CH: First survey on Investments for Development, First broad market survey in cooperation with FNG, cooperation with Novethic on IAO survey 	

No	Dimension	Priority name	Description	Objectives
5	National	Facilitation of sustainable finance education	Provide open source education material for finance professionals. Setup of recurring education events with AZEK, GFRI/SFG and different business schools.	<ul style="list-style-type: none"> • Strong SF competence and capacities at financial service providers in CH • Knowledgeable investment advisory to private investors as well as IAO
			Planned activities (examples): <ul style="list-style-type: none"> • Develop standard training module on sustainable finance • Provide education through topical events and courses for financial professionals (in cooperation with partners such as AZEK, SFI and other Business Schools) • Support SF academic research 	
6	National	Political dialogue	Focused dialogue with regulator and politicians on beneficial frameworks for SF. Cooperation with Swiss administration in sustainable finance initiatives.	<ul style="list-style-type: none"> • Clarify realistic aspiration and communicate to members • Establish environment for innovation and growth of SF (regulatory, market, industry)
			Planned activities (examples): <ul style="list-style-type: none"> • Active dialogue with Swiss authorities (SECO, SIF, FOEN, SDC) • Contribution to proposals for a Swiss Roadmap in sustainable finance (FOEN-project) • Develop concept for political dialogue matching SSF resources 	
7	Inter-national	International representation and recognition	Representing Switzerland in relevant fora and facilitating promotion of Swiss strengths in SF.	<ul style="list-style-type: none"> • Recognition of Switzerland as a relevant player in key international SF networks, perception of Swiss SF capabilities as relevant and innovative
			Planned activities (examples): <ul style="list-style-type: none"> • Identify relevant international finance events and represent Switzerland • Facilitate international exposure of Swiss experts through organisation of Swiss events abroad (i.e. with embassies) 	

No	Dimension	Priority name	Description	Objectives
8	Topical leadership	Sustainable investments in private wealth management	Fostering innovative SF offering in private wealth management through tools aimed at better servicing clients regarding values and value	<ul style="list-style-type: none"> • Strengthen Swiss USPs in private wealth management • Help members align their services to needs of next generation
			Planned activities (examples): <ul style="list-style-type: none"> • Develop 10 arguments for relationship managers to offer sustainable investing • Develop a communication strategy to help positioning Switzerland as a hub for sustainable private wealth management 	
9	Topical leadership	Investments for development	Strengthen knowledge on investments for development and foster beneficial frameworks	<ul style="list-style-type: none"> • Provide information on IfD • Identify regulatory barriers and eliminate them
			Planned activities (examples): <ul style="list-style-type: none"> • Collect market data on Swiss Investments for Development and prepare publication • Identify regulatory barriers for Investments for Development and address them 	

Conclusion and next steps

- SSF will focus its activities on the set priorities in the coming year
- The strategy will be presented and discussed with members at the Members' Assembly 2016
- Results will be evaluated at the end of 2016 in order to fine-tune strategy after one year

We look forward to further working with you on these priorities with your support in 2016/2017!