



WORLD BANK GROUP
Social Protection & Labor

World Bank Core Course on Pensions
Washington, D.C. – April 25-May 6, 2016
Room I-2-250

COURSE AGENDA

April 10, 2016

This course aims to provide participants with an in-depth understanding of the conceptual and practical issues involved in the design and implementation of pension and social security programs and linkages to social protection and labor systems. The course is divided into introductory and advanced modules of one week each and will be held concurrently with a similar course on Social Safety Nets.

Module 1 (Week 1). The objective of this introductory module is to introduce participants to the conceptual framework used for Social Protection and Labor Systems; and to provide instruction in the diagnostic framework and analytical tools used for the diagnostic assessment of pensions and social security schemes.

Module 2 (Week 2). The objective of this advanced module is to provide participants with a detailed understanding of topical issues or themes. The issue areas to be focused on in the course this year will be: (i) challenges of reform of public pension schemes; (ii) pensions and labor market policies in aging economies; (iii) challenges of funded schemes; (iv) pension governance and investment management, and (v) pension regulation, and supervision.

The agenda includes the application of different pedagogical methods including:

- (i) Instructional presentations on the conceptual framework and analytical methods used for social protection and labor and pensions assessment;
- (ii) Presentations from select case studies illustrating the challenges and lessons learned from different reform measures employed;
- (iii) Group exercises whereby participants will be able to use the conceptual framework and modeling tools to work through real public policy choices;
- (iv) Hands-on participatory workshop sessions in which course participants will work in groups to design reform programs for country cases which apply the instructional content; and
- (v) Structured information sharing and south-south luncheon exchanges.

Pensions Core Course – April-May 2016 – Agenda - Week 1

Week 1: Introduction to Conceptual Framework and Analytical Tools					
	Day 1 – Monday April 25 Preston Auditorium	Day 2 – Tuesday April 26 Room I-2-220	Day 3 – Wednesday April 27 Room I-2-220	Day 4 – Thursday April 28 Room I-2-220	Day 5 – Friday April 29 Room I-2-220
8:30-9:00	Registration – Coffee	Coffee	Coffee	Coffee	Coffee
9:00-10:30	Welcome and Introduction – SPL Senior Director	<ul style="list-style-type: none"> Elderly Assistance – Universal vs. targeted; targeting by household vs. individual – Non-contributory elderly assistance - Social pensions and social assistance 	<ul style="list-style-type: none"> Introduction to the ADePT analytical tool Introduction to ASPIRE database 	<ul style="list-style-type: none"> The Role of Unique Identification in Pensions and Social Protection 	Introduction to PROST
	The World Bank's Conceptual Framework and Engagement in Social Protection and Labor				
	Laura Rawlings (World Bank)	Robert Palacios & Margaret Grosh	Ruslan Yemtsov, Brooks Evans, Claudia Rodriguez, Maddalena Honorati	Robert Palacios	
10:30-11:00	Coffee	Coffee	Coffee	Coffee	Coffee
11:00-12:30	Global Trends and Challenges in Social Protection and Labor	Public mandatory contributory Defined-Benefit and Defined Contribution schemes	<ul style="list-style-type: none"> Introduction to the ADePT analytical tool Introduction to ASPIRE database 	<ul style="list-style-type: none"> Overview of the SPL Systems Framework Overview of SPL Delivery Systems Diagnostic Diagnostic Assessment Toolkit for Payment Systems 	Introduction to APEX (with short exercise)
	Ruslan Yemtsov & Robert Palacios	Edward Whitehouse	Brooks Evans, Claudia Rodriguez, Maddalena Honorati	Kathy Lindert, Oleksiy Sluchynsky,	
12:30-2:00	Lunch (provided) Participant Introductions & Learning Objectives	Lunch	Lunch	Lunch	Lunch
2:00-3:30	<ul style="list-style-type: none"> Analytical techniques and considerations for evaluation of SPL Programs & Poverty/Vulnerability Assessment: Metrics for SPL performance evaluation, Efficiency & Cost-Effectiveness assess. 	Supplementary Occupational, Civil Servant and Personal Pensions Arrangements	<ul style="list-style-type: none"> ADePT exercise 	Spot Exercise - Parametric reform options in OECD countries	PROST Exercise
	Ruslan Yemtsov	Richard Hinz, Edward Whitehouse	Brooks Evans, Claudia Rodriguez	Edward Whitehouse	
3:00-3:30	Coffee	Coffee	Coffee	Coffee	Coffee
4:00-5:30	Stories from the Field: Select Country Engagements in SPL	Illinois Pension Case Study	Breakouts – Regional Dimensions of Pension Challenges	<ul style="list-style-type: none"> Spot Exercise (continued) Parametric reform options in OECD countries 	PROST Exercise Summary of Week 1 – Conceptual Framework & Analytical Tools
	TTLs (TBD)	Mark Dorfman	Anita Schwarz (ECA) Mark Dorfman (SSA)	Edward Whitehouse (Consultant)	Magdalena Abels, Tatyana Bogomolova and Sergei Biletsky Mark Dorfman

Reception: 6:00-8:00



Pensions Core Course – April-May 2016 – Agenda - Week 2

	Day 6 – Monday May 2	Day 7 – Tuesday May 3	Day 8 – Wednesday May 4	Day 9 – Thursday May 5	Day 10 – Friday May 6
	Pension Regulation and Supervision	The Impact of Population Aging	Challenges of Funded Pension Schemes	Pension Governance and Investment Management	Conclusions & Group Projects
8:30 – 9:00	Coffee	Coffee	Coffee	Coffee	Coffee
9:00-10:30	Pension regulation and supervision	The Old-Age Preparedness Index	Pension Policy Reversals of Funded Schemes	Framework for Pension Investment Management	Civil Service Pension Reform: The experience of the US Thrift Savings Plan
	Richard Hinz (Consultant)	Richard Jackson, Global Aging Institute (tbc)	Agnieszka Chlon-Dominczak: Assistant Professor, Warsaw University (via VC)	Sudhir Rajkumar, World Bank Treasury	James Petrick, Thrift Savings Plan (tbc)
10:30-11:00	Coffee	Coffee	Coffee	Coffee	Coffee
11:00-12:30	Key principles of pension regulation and supervision: Insights from The Chilean Experience	The Fiscal Dimensions of Aging Societies	Enabling conditions for Funded Pension Schemes	Key Investment Management Considerations for Public Pension Funds in Developing Countries	Measuring Pension Entitlements from Funded Schemes – What has been the Performance?
	Solange Berstein, Senior Specialist, IDB and former Pension Superintendent, Chile	Vitor Gaspar, Director, IMF Fiscal Affairs Department	Csaba Feher, IMF	Arun S. Muralidhar, Chairman and CIO, AEGIS	Ed Whitehouse
12:30-2:00	Lunch	Lunch	Lunch:	Lunch.	Lunch
2:00-3:30	Practitioner's Experience with Public Pension Reform	Implications of Aging on Pensions	Enabling conditions for Funded Pension Schemes Strengthening Old Age Income Protection in Chile	Options for Achieving Diversification in thin and weakly regulated markets	Group Projects Presentation
	Ernesto Brodersohn, (Mexico)	Anita Schwarz (ECA) Robert Palacios (EAP)	Solange Berstein, Senior Specialist, IDB and former Pension Superintendent, Chile	Dmitry Pevzner (World Bank Treasury); Fiona Stewart, (World Bank)	
3:30-4:00	Coffee	Coffee	Coffee	Coffee	Coffee
4:00-5:30	Conclusion of PROST Exercise Group Projects	Alternative approaches to social insurance Voluntary schemes: opt outs and behavioral economics	Group Projects	Group Projects	<ul style="list-style-type: none"> • Group Projects – Completion • Completion Certificates
	Magdalena Abels, Tatyana Bogomolova, Sergei Biletsky, Mark Dorfman	Mariano Bosch (IDB-LAC), Heinz Rudolf			

Course Dinner 6:30-9:00