



Mefop

# PARTNER MEFOP 2026

[Main](#) | [Premium](#) | [Stats](#) | [Light](#)

Enter the Mefop Network



## ABOUT US

Mefop SpA (Company for the development of the Pension Fund Market) was founded in 1999. It encompasses a broad range of pension funds (approximately 90 members) and the participation of the Ministry of Economy and Finance, which holds the absolute majority of shares.

To promote the development of pension funds and other forms of social security, the company's corporate purpose is to provide training, research, assistance and promotion in matters relating to supplementary pensions, as per Legislative Decree No. 252 dated 5 December 2005 and subsequent amendments and additions, and related sectors, including other forms of social security.

Over the years, in light of the evolution of welfare systems, Mefop has included institutional entities, such as pension funds and health funds, and market operators amongst its stakeholders.

Today, it provides research, support, consulting, services and training to all stakeholders who, in various capacities, operate in the public and private welfare system.



- ◆ Study ◆ Consultancy ◆ Training ◆ Publications
- ◆ Technical committee meetings ◆ Analyses ◆ Services

## THE MEFOP NETWORK

**94**

**PENSION FUNDS**

**58**

**HEALTH FUNDS**

**12**

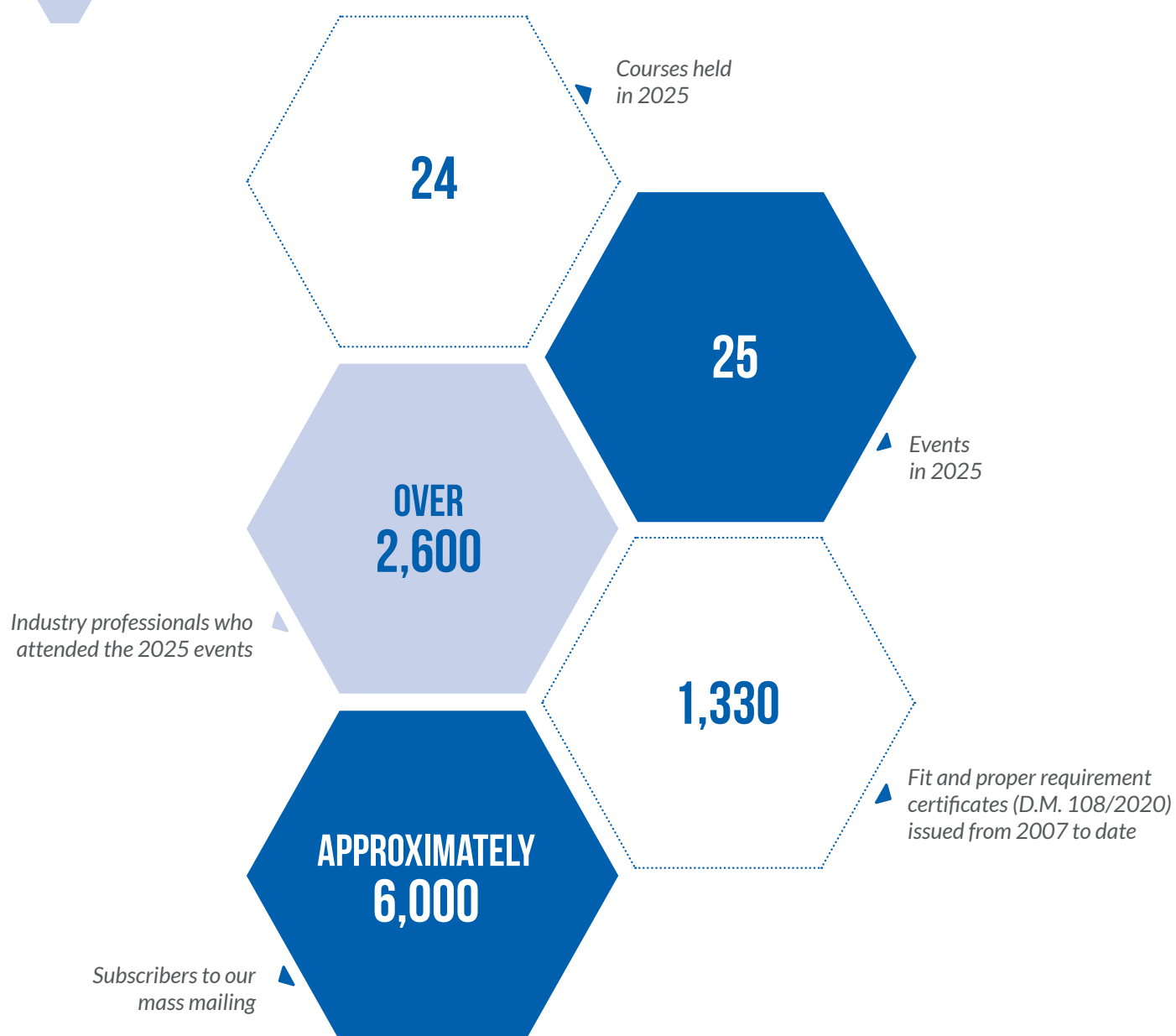
**PENSION FUNDS FOR  
SELF EMPLOYED**

**54**

**PARTNERS**

asset managers, services,  
custodian banks, financial  
and legal advisors

## THE MEFOP ACTIVITIES IN FIGURES





## PARTNERSHIP PROPOSALS

We offer all stakeholders in the sector (asset managers, services, custodian banks, financial and legal advisor,...) the opportunity to join our network through various agreements. Each proposal differs in the services included and the level of involvement in Mefop's activities.

### LIGHT

The basic solution that allows our services to be purchased at discounted prices and attendance at our events.

**3,500.00 + VAT/year**

#### Events and training

- ▶ Free attendance at institutional meetings and technical committee meetings
- ▶ Free participation for employees in advanced training courses

#### Services and data

- ▶ Discounts on all projects and on-demand services
- ▶ Press review
- ▶ Web publications

### STATS

The solution designed for those who want to learn about and analyse the market and participate in our events.

**5,500.00 + VAT/year**

#### Events and training

- ▶ Free attendance at institutional meetings and technical committee meetings
- ▶ Free participation for employees in advanced training courses

#### Services and data

- ▶ Discounts on all projects and on-demand services
- ▶ Press review
- ▶ Web publications
- ▶ Previ|DATA
- ▶ Call for tenders and mandates alerts

### PREMIUM

The solution that combines visibility and participation

**12,000.00 + VAT/year**

#### Events and training

- ▶ Co-branding sponsorship at Agorà Mefop events
- ▶ Free attendance at institutional meetings and technical committee meetings
- ▶ Testimonials at courses organised by Mefop
- ▶ Free participation for employees in advanced training courses

#### Advertising and visibility

- ▶ Logo on homepage
- ▶ Dedicated web page
- ▶ Logo on promotional activities for Agorà events and courses
- ▶ On-demand publication of news in the section of Mefop's website
- ▶ On-demand attendance of Mefop staff at partner's events

#### Services and data

- ▶ Discounts on all projects and on-demand services
- ▶ Press review
- ▶ Web publications

### MAIN

The full solution for partners who want to take advantage of all our services

**24,000.00 + VAT/year**

#### Events and training

- ▶ Co-branding sponsorship at Agorà Mefop events
- ▶ Attendance at Agorà Mefop events with speech
- ▶ Free attendance at institutional meetings and technical committee meetings
- ▶ Testimonials at courses organised by Mefop
- ▶ Free participation for employees in advanced training courses

#### Advertising and visibility

- ▶ Logo on homepage
- ▶ Dedicated web page
- ▶ Logo on promotional activities for Agorà events and courses
- ▶ On-demand publication of news in the section of Mefop's website
- ▶ On-demand attendance of Mefop staff at partner's events

#### Services and data

- ▶ Discounts on all projects and on-demand services
- ▶ Press review
- ▶ Web publications
- ▶ Previ|DATA
- ▶ Call for tenders and mandates alerts

# MEFOP ACTIVITIES FOR 2026







Since its foundation, Mefop has facilitated the meeting of supply and demand in the welfare market through events, seminars and conferences. Our events in 2026 continue to aim to combine institutional outreach with the development of a virtuous welfare market.

Throughout the year, several meetings will be organised where our partners can network and engage in discussions with our stakeholders in the pension and supplementary healthcare sectors.

The main events are outlined below:



**Agorà events**



**Conferences**



**Working Groups**



**Welfare drinks and other events**



---

# Agorà Mefop

welfare

*Our ongoing engagement with our partners and stakeholders has led to a **strong demand for meetings and discussions aimed at building a bridge to the future**, through knowledge, discussion and experimentation.*

*Agorà Mefop welfare aims to create a **physical and thought-provoking space** where welfare stakeholders can meet to **deepen their knowledge** and **foster action**.*

*In ancient times, the Agorà was the heart of the polis; for us, it represents the physical and virtual space of a community open to cross-fertilisation and a **space where all welfare stakeholders and institutions meet to cultivate culture, disseminate knowledge, foster action plans and design future welfare**.*

*Within Agorà, the dialogue between our stakeholders and institutions becomes a driving force for planning, progress and value creation, built around people and their needs.*

*Agorà Mefop welfare plans to organise public events in Rome, with the aim of fostering networking amongst our stakeholders.*



## CONFERENCES

*The conference activity that has always characterised the institutional profile will be repeated in 2026 to address the most political and institutional topics. The conferences are free and open to all.*



## TECHNICAL COMMITTEE MEETINGS

*Mefop's work with technical committee meetings will continue in 2026. These meetings focus on the most current issues for our stakeholders.*

*One of the objectives of the technical committee meetings is to create communities that engage in dialogue and exchange ideas in a «peer-to-peer» manner. Participation in the technical committee meetings is open to members and partners and is particularly useful for developing dialogue between senior management, key functions and middle managers of our stakeholders.*



## WELFARE DRINKS AND OTHER EVENTS

*During 2026, one or more events on specific topics will be organised, partly through ongoing dialogue with all stakeholders. These events will be linked to networking opportunities and, where possible, interested partners will be invited to contribute to the discussion.*

*This type of event is intended to complement the seminar with a convivial activity, typically held in the early evening, with the aim of enhancing the quality of sharing.*







## WORKING GROUPS

Mefop develops opportunities for meetings and discussions between the various stakeholders in the pension and welfare sector through the establishment of several technical working groups. These will produce documents, position papers and reports to be shared with the relevant organisations and institutions.

### ► **Pension Funds:**

- Governance (Iorp2, Model 231 and Whistleblowing)
- DORA Regulations
- Financial Innovation and Life Cycle
- EU Legislation
- Pay out phase
- Use of Artificial Intelligence
- Social Reports
- Networking for sharing experiences, identifying common solutions and developing best practices through the Fundamental Functions Committee and the Compliance Functions Committee

### ► **Health Funds:**

- Updating and monitoring of the “Best Practice Guidelines for Health Funds”, with particular reference to: governance models, accountability and transparency in management; organisational models and risk management; healthcare, social health and long-term care planning; and communication about health funds
- Legislative Decree 231/2001 and whistleblowing
- Permanent Regulatory and Fiscal Monitoring Committee
- Use of Artificial Intelligence
- Social Reports

### ► **Pension funds for self employed:**

- Public Contracts
- Model 231 and whistleblowing
- Pension Benefits, Revaluation of Contribution Amounts and Adequacy
- Accounting and Financial Statements, Technical Financial Statements, Social Reports
- Use of Artificial Intelligence



## Executive Master's

- ▶ Financial Management of Institutional Investors
- ▶ Regulation and Management of Supplementary Healthcare



## Digital Skill

- ▶ Previfin
- ▶ PrevIA



## Professional Training Courses

- ▶ «PrevComp» Professional Training Course (formerly Ministerial Decree 108/20)  
*In partnership with the "Sapienza" University of Rome*



## Executive Courses

- ▶ Governance of Supplementary Pension Plans
- ▶ Taxation of Supplementary Pension Plans
- ▶ Financing of Supplementary Pension Plans
- ▶ Governance and updates to Iorip2
- ▶ Communication and Transparency
- ▶ Public healthcare system
- ▶ Regulations, Governance and Compliance of Health Funds
- ▶ Healthcare Planning and Management Process of a Supplementary Healthcare Fund
- ▶ Procurement Regulations
- ▶ Public Accounting and Pension Fund Budgeting



## Advanced Courses

- ▶ Developments in EU Regulations
- ▶ Investing in Derivatives
- ▶ Investments in Private Markets
- ▶ Net-Zero Investment Policies and Climate Risk Management
- ▶ Technical Budgeting and Technical-Actuarial Assessments
- ▶ Corporate Welfare: Planning, Management and Control
- ▶ Workshop on Procedures, Forms and Constraints for Pension Funds
- ▶ DORA Regulation
- ▶ Pension Investors and Sustainability



## TRAINING TARGETS

- ◎ Trade Union and Employer Representatives
- ◎ Board Members of Bilateral Institutions
- ◎ Finance Officers and Other Industry Experts
- ◎ Young High School Graduates
- ◎ Board Members and Structures of Pension Funds, Health Funds and Pension Funds for Self Employed



## PREVI | DATA

### Statistical services

Access to Previ|DATA and download data. The database contains two sections: Pension Funds and Pension Funds for Self Employed.

The *Pension Funds* section monitors all contractual, open-ended, and PIP pension funds registered with the Covip Register, as well as the main pre-existing pension funds and allows you to analyse and compare the different situations regarding:

- ✓ costs (direct costs, indirect costs, ISC)
- ✓ asset management (guarantees, benchmarks, sustainability, predefined allocation strategies, asset managers)
- ✓ benefits (ancillary benefits, types of annuities offered, demographic and financial bases, annuity costs, payment frequencies)
- ✓ main statistics (members, contributions, assets, returns and TER)
- ✓ stakeholders (board's composition, key and other functions, service providers)

The section also contains:

- ✓ the main pension fund documents (such as information notes, regulations, Articles of Association, general terms and conditions of agreement, documents on the governance system, statement of investment principles, documents relating to SRD II and SFDR and pension fund financial statements)
- ✓ access to the calculation function of ISC

The *Pension funds for Self Employed* monitors all Pension Funds for Self Employed and allows you to analyse and compare the different situations regarding:

- ✓ asset management
- ✓ benefits and contributions
- ✓ members and pensioners
- ✓ welfare benefits
- ✓ governance
- ✓ stakeholders (service providers)

The section also contains the institutions' main documents (financial statements, technical reports, Articles of Association and any additional documents available on their respective websites). The fact-sheets can also be referred to for each pension fund.



## CALLS FOR TENDER AND MANDATES ALERTS

### Statistical services

This service offers customer, via a dedicated email, the opportunity to be immediately informed of the publication of tender notices, along with relevant details and deadlines.

The service comprises:

- ✓ a notice at the beginning of each quarter (1 January, 1 April, 1 July, 1 October) of mandates expiring during the relevant quarter;
- ✓ timely notification of the start of the selection procedures for: asset manager, custodian bank, financial advisor and administrative service, through the publication of the tender notice/questionnaire.

## PUBLICATIONS



### Prospettive

A biannual *magazine* dedicated to in-depth analysis of *welfare* issues, which also encompasses the main areas of study and research pursued by Mefop.



### Welfare on-line

A *web* publication created to provide timely insights and reflections on the most pressing current issues concerning pension funds, health funds and pension funds for self employed.



### Osservatorio Giuridico

A biannual periodical dedicated to the discussion of legal and regulatory issues. A useful tool for addressing specific operational issues in the pension fund sector and pension investors.



### NewsCasse

A magazine for information, debate and in-depth analysis of the main issues concerning the professional pension sector.



### Bollettino Statistico

A quarterly periodical that provides an in-depth analysis of the statistical and quantitative aspects of supplementary pension provision, offering a constantly updated summary of data and highlighting trends, dynamics and key trends in the sector.



### MidTerm Report

A publication with a statistical-quantitative approach that analyses the operational aspects of Italian pension funds, addressing key issues such as costs, returns, investments, sustainability and the sector's main dynamics.



### Quaderni

A series offering in-depth monographs on topics of theoretical and empirical relevance (e.g., behavioural finance) for which possible solutions are proposed.



### Working Paper

A valuable tool for theoretical refresher training. Working Papers feature scientific contributions, studies and research on pensions by Italian and international academics and experts (in the case of foreign authors, they may be published in their original language).



### Pillole di Previ | DATA

A monthly periodical containing statistical-quantitative insights into the welfare sector.



### **Pillole dall'Europa e dal Mondo**

The newsletter on European and international issues with all the updates on EU and international aspects regarding the pension sector.



### **Pillole di Sani | DATA**

Quarterly periodical containing statistical and quantitative insights into the supplementary healthcare sector.







[www.mefop.it](http://www.mefop.it)

---

Follow us on



**MEFOP**  
Via Aniene, 14  
00198 Rome  
Tel. 06 480 735 01  
email: [mefop@mefop.it](mailto:mefop@mefop.it)

