

PRESS RELEASE

FOR IMMEDIATE RELEASE

PENSIONS POLICY INSTITUTE

PPI

The Pensions world needs YOU! - to take this new survey from the Pensions Policy Institute

The Pensions Policy Institute (PPI) is undertaking ground-breaking research, which will break through the confusion surrounding Environmental, Social and Governance (ESG) and climate change to identify actual barriers faced by schemes and practical policy solutions for helping schemes to engage in a more meaningful way. Your input is essential to ensure the PPI understands how important decision-makers think and feel about these issues.

The PPI's *Engaging with ESG* research series is sponsored by a consortium including **Newton Investment Management, Phoenix Group, ABI, Baker McKenzie, PLSA** and **Scottish Widows**. The series will identify ways to improve engagement among trustees and contract-based scheme providers, with the findings of the survey providing insight into how they have been engaging so far following changes to SIP regulations in 2018 - and their preparedness for further changes which came into force in October 2020. The survey asks about the process schemes have gone through in order to design and implement an investment strategy that incorporates ESG considerations, as well as the challenges they may have faced while doing so.



Lauren Wilkinson, Senior Policy Researcher at the PPI said “Although knowledge and understanding of ESG considerations has grown across the industry as a whole, some schemes are struggling to integrate ESG factors into their investment strategy, while others have made much bigger strides. We want to find out more about the actual experiences of schemes, the barriers they have faced, their difficulties and their successes, so the policy world can properly understand the circumstances in which schemes are operating. As well as gathering data through the survey, we will be carrying out follow-up interviews to gain a deeper understanding of schemes’ experiences. This analysis of scheme behaviour will help to clarify where there may be a role for greater support and intervention in order to improve engagement and integration going forward.”

We would welcome responses from anyone involved in the ESG decision-making process, including DC and DB scheme managers, trustees, investment officers, advisers, consultants and asset managers.

The survey will close on Monday 30th November and can be found here:
<https://www.surveymonkey.co.uk/r/K8WQNWD>

Date of Issue: Monday 9th November 2020

Twitter: @PPI_Research

PRESS RELEASE

FOR IMMEDIATE RELEASE

PENSIONS POLICY INSTITUTE

PPI

~~ ENDS ~~

For further information please contact -

Lauren Wilkinson, Senior Policy Researcher (PPI)

email: lauren@pensionspolicyinstitute.org.uk

Notes for editors

1. **We are an independent educational research charity: The Pensions Policy Institute (PPI)** does not lobby for any particular solution and we are not a think-tank taking politically influenced views. The PPI is an educational research charity, which provides non-political, independent comment and analysis on policy on pensions and retirement income provision in the UK. Its aim is to improve the information and understanding about pensions policy and retirement income provision through research and analysis, discussion and publication. Further information on the PPI is available on our website www.pensionspolicyinstitute.org.uk.
2. The series will launch with a Briefing Note, *Engaging with ESG: The story so far*, in December 2020. Two additional reports exploring climate change and ESG factors will be launched in the first half of 2021.

Date of Issue: Monday 9th November 2020

Twitter: @PPI_Research