

## Prof. Dr. Robert Holzmann

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### I. PERSONAL DATA

#### VITAL DATA

Born: February 27, 1949, in Leoben, Styria, Austria  
Citizenship: Austrian

#### EDUCATION

1972 Master (Economics), University of Graz  
1972/73 Études en économie du doctorat ès université, Université de Grenoble  
1977 Ph.D. (Economics), University of Vienna  
1983 "Habilitation"/"Aggregation" (venia legendi for Public Finance, Economic Policy and Applied Economic Theory), University of Vienna  
1997/98 Executive Development Program (Harvard Business School)

#### EMPLOYMENT RECORD/POSITIONS

1973-75 Lecturer of Economics, Economic Department, University of Graz  
1975-92 Assistant/Associate Professor, Economic Department, University of Vienna  
1983-2005 Research Director of the Ludwig-Boltzmann Institute for Economic Policy Analyses, Vienna  
1985-87 Senior Economist, OECD, Paris  
1988-90 Senior Economist, International Monetary Fund, Washington  
1990- Consultant: International Monetary Fund, World Bank, OECD, EU, Austrian National Bank, GTZ, Council of Europe, ILO, ISSA, etc.  
1992-2003 Full professor for International Economics and European Economy, Economic Department; Managing Director of European Institute, both University of Saarland, Germany (with leave of absence from 1997)  
1997-2009 Sector Director and Sector Board Head, World Bank  
2002-03 Acting Senior Vice President, Human Development Network, World Bank  
2009-2011 Research Director, Marseille Center for Mediterranean Integration, and Senior Advisor, Financial Literacy & Education Research Program, both World Bank  
2012 - 2015 Old Age Financial Protection Chair, University of Malaya, Kuala Lumpur, Malaysia  
2013 - Honorary Professor, University of New South Wales, Sydney, Australia  
2016 - Elected Fellow, Austrian Academy of Sciences, Vienna

#### LANGUAGES

German (native language), English (proficient), French (proficient), Spanish (advanced)

**FELLOWSHIP/MEMBER/ETC.**

Research Fellow, CESifo (Munich)

Research Fellow, IZA (Bonn)

Associate Editor, Economics – E-journal

Member and Chairman - Advisory Board, EcoAustria Research Institute

Member – Advisor, Journal of Institutions and Economics (University of Malaya, Kuala Lumpur)

Member - Advisory Board of Center of Development Studies (University of Rome – Tor Vergata)

Member – Editorial and Advisory Board of International Journal of Social Security and Workers Compensation (Australia)

Member – Editorial Board of Journal of Public Policy

Member – Scientific Advisory Board, Population Europe

Member – Advisory Board of Journal of Institutions and Economies

Distinguished Associate – Atlantic International Economic Society

Distinguished Research Fellow, University of Malaya, Kuala Lumpur, Malaysia

**PUBLICATIONS (summary)**

37 books, 90 contributions in books, 45 papers in refereed journals, 28 paper in policy-oriented non-referred journals, 22 other publications, and numerous discussion, research and policy papers.

## II. PUBLICATIONS

### 1. Books

- (38)-(39) *Nonfinancial Defined Contribution Schemes: Facing the Challenges of Marginalization and Polarization in Economy and Society*, World Bank Series. 2 volumes with 37 chapters (in preparation, lead editor, with Edward Palmer, Robert Palacios, and Stefano Sacchi. Expected for Annual Meeting 2019)
- (37) *The Taxation of Pensions*. CESifo Publication Series, Cambridge, Mass – London, England: MIT Press, 2018. Editor with John Piggott.
- (36) *Managed Labor Migration in Afghanistan: Exploring Employment and Growth Opportunities for Afghanistan*. 2018. Kabul: World Bank
- (35) *Nachhaltigkeit der Staatsverschuldung*. RH Institute zur ökonomischen Analyse der Wirtschaftspolitik. Wien: Peter Lang 2017 (co-editor with Reinhard Neck)
- (34) *Financial Capability in Low and Middle Income Countries: Measurement and Effectiveness*. Knowledge Management Report on the Russia Trust Fund on Financial Literacy & Education. Washington, D.C.: The World Bank; conference edition. (2013, lead author, with Florentina Mulaj and Valeria Perotti, and the support of World Bank project team).
- (33) *China's Pension System – A Vision*. (2013, co-author, with World Bank team), Washington DC: World Bank.
- (32) *Matching Contributions for Pensions: A Review of International Experience* (2013, co-editor with Richard Hinz, Nuriyuki Takayama and David Tuesta), Washington, D.C. (The World Bank). [Chinese version January 2016.]
- (31) *NDC Pension Schemes in a Changing Pension World, Volume 2: Gender, Politics, and Financial Stability*. (2013, lead editor with Edward Palmer and David Robalino), Washington, D.C.: The World Bank & Swedish Social Insurance Agency. [Chinese version October 2017]
- (30) *NDC Pension Schemes in a Changing Pension World, Volume 1: Progress, Issues, and Implementation*. (2012, lead editor with Edward Palmer and David Robalino), Washington, D.C.: The World Bank & Swedish Social Insurance Agency. [Chinese version October 2017]
- (29) *Reforming Severance Pay: An International Perspective*, (2012, editor, with Milan Vodopivec), Washington, D.C.: The World Bank.
- (28) *Closing the Coverage Gap: The Role of Social Pensions and Other Retirement Income Transfers*, (2009, lead editor, with David Robalino, and Nuriyuki Takayama), Washington, D.C.: The World Bank.
- (27) *Adequacy of Retirement Income after Pension Reform in Central, Eastern, and Southern Europe: Eight Country Studies*, (2009, with Ufuk Guven), Washington, D.C. (The World Bank).
- (26) *Aging Populations, Pension Funds, and Financial Markets: Regional Perspectives and Global Challenges for Central, Eastern and Southern Europe*, (2009, editor), Washington, D.C. (The World Bank).
- (25) *Social Protection & Labor at the World Bank – 2000 to 2008*. (2009, editor), Washington, D.C. (The World Bank).

(24) *Pension Reform in South-Eastern Europe: Linking Pension Reform with Labor and Financial Market Reforms*, (2009, editor with Landis Mackellar and Jana Repansek), Washington, D.C. (The World Bank and Center for Financial Excellence).

(23) *Pension Reform: Issues and Prospect for Non-Financial Defined Contribution (NDC) Schemes*, (2006, editor with Edward Palmer), Washington, D.C. (The World Bank). Revolution in der Alterssicherung: Beitragskonten auf Umlagebasis (2008, Campus Verlag: Frankfurt und New York); [Chinese and Spanish publications also available in print and on the web]

(22) *Old-Age Income Support in the 21st Century: An International Perspective on Pension Systems and Reform* (2005, lead author, with Richard Hinz and Bank staff), Washington, D.C. (The World Bank). Soporte del ingreso económico en la vejez en el siglo XXI: Una perspectiva internacional de los sistemas de pensiones y de sus reformas (2006, Banco mundial con Mayol Ediciones, Bogota, Colombia), (Translation into Chinese, Croatian, and Russian available on the web)

(21) *Challenges and Opportunities of International Migration for the EU, Its Member States, Neighboring Countries and Regions*, (2004, with Rainer Muenz), Stockholm (Institute for Futures Studies).

(20) *Pension Reform in Europe – Process and Progress* (2003, ed. with M. Orenstein and M. Rutkowski), Washington, D.C. (The World Bank).

(19) *New Ideas about Old Age Security – Toward sustainable pension systems in the 21st century*, (2001, ed. with J. Stiglitz), Washington, D.C. (The World Bank). [Chinese version 2004].

(18) *Social Protection Sector Strategy: From Safety Net to Springboard*, (2001; lead author with S. Jorgensen), Washington, D.C. (The World Bank).

(17) *Staatsschulden am Ende? Ursachen, Wirkungen und Zukunftsperspektiven*, (2000, Hrsg. mit R. Neck und F. Schneider), Schriftenreihe des Ludwig Boltzmann Instituts zur Analyse wirtschaftspolitischer Aktivitäten, Bd. 17, Wien (Manz).

(16) *Was wird aus Euroland? Makroökonomische Herausforderungen und wirtschaftspolitische Antworten*, (1999, Hrsg., mit R. Neck), Schriftenreihe des Ludwig Boltzmann Instituts zur Analyse wirtschaftspolitischer Aktivitäten, Bd. 15, Wien (Manz).

(15) *The Mixed Blessing of Financial Inflows - Transition Countries in Comparative Perspective*, (1999, ed) Edgar Elgar, with J. Gács und M. Wyzan.

(14) *Large Scale Fiscal Transfers, Economic Convergence, and Absorptive Capacity*, (1997, mit Hervé Yves), Schriftenreihe des Europa-Institut, Sektion Wirtschaftswissenschaft, Bd. 4, Baden-Baden (Nomos).

(13) *Wirtschaftliche Folgen der Öffnung Osteuropas für Österreich*, (1996, ed.), Schriftenreihe des Ludwig Boltzmann Instituts für ökonomische Analysen, Bd. 14, Wien (Manz), with R.Neck.

(12) *Maastricht: Monetary Constitution without Fiscal Constitution*, (1996, ed.), Schriftenreihe des Europa-Institut, Sektion Wirtschaftswissenschaft, Nomos, Vol. 3.

(11) *Löhne und Beschäftigung - Untersuchungen für die BRD*, (1996, ed.), Schriftenreihe des Europa-Institut, Sektion Wirtschaftswissenschaft, Nomos, Vol. 2.

(10) *Output Decline in Eastern Europe - Unavoidable, External Influence or Homemade?* (1995, ed.), Kluwer, with G. Winckler and J.Gacs.

- (9) *Stabilitätseffekte der österreichischen Fiskalpolitik* (1993, ed.), Schriftenreihe des Ludwig Boltzmann Instituts für ökonomische Analysen, Bd. 10, Wien (Manz), with R.Neck.
- (8) *Reforming Public Pensions / La Réforme des Régimes Publics de Pensions* (1988), Paris (OECD).
- (7) *Ökonomische Analyse der Sozialversicherung* (1988, ed.), Schriftenreihe des Ludwig Boltzmann Instituts für ökonomische Analysen, Bd. 3, Wien (Manz).
- (6) *Bevölkerung and Sozialstaat: Budgetpolitische and demographische Szenarien bis zum Jahr 2050* (1987, ed.), Schriftenreihe des Ludwig Boltzmann Instituts für ökonomische Analysen, Bd. 2, Wien (Manz), with P.Findl and R.Münz.
- (5) *Straßenfinanzierung: Eine internationale Übersicht*, Schriftenreihe Straßenforschung des BMBT (1986), Heft 281, Vienna, with G.Estermann et al.
- (4) *Pensionsreform and Finanzmarkteffekte: Eine Studie über Marktchancen von Vorsorgeversicherungen mit Pensionscharakter* (1985), Quartalshefte, special issue, with G.Winckler and W.Fraiszler.
- (3) *Lebenseinkommen and Verteilungsanalyse: Ein methodischer Rahmen für eine Neuorientierung der Verteilungspolitik* (1984), Studies in Contemporary Economics, vol.9, Berlin-Heidelberg-New York-Tokyo (Springer).
- (2) *Quantitative Sozialpolitik, Finanzsysteme and Pensionsversicherung* (1979), Wien (Verlag der österreichischen Akademie der Wissenschaften).
- (1) *Simulationsanalysen zur österreichischen Pensionsdynamik. Eine Studie zur Indexbindung von Einkommen* (1976), Wien (Verlag der österreichischen Akademie der Wissenschaften) 1976, with D.Bös.

## 2. Contributions in books

- (90) “The Taxation of Pensions under Review: Motivation, Issues, and Directions.” 2018, In R. Holzmann and J. Piggott (eds). *The Taxation of Pensions*. MIT Press, pp. 3-36 (with John Piggott).
- (89) “The Taxation of Internationally Portable Pensions: Fiscal Issues and Policy Options.” 2018, In R. Holzmann and J. Piggott (eds). *The Taxation of Pensions*. MIT Press, pp. 443-479 (with Bernd Genser).
- (88) “La fase de percepción de los pagos de las pensiones: tendencias, problemas, principales desafíos y papel del gobierno.” 2017. En Luis Carranza, Ángel Melguizo y David Tuesta, editores. *Ideas para una Reforma de Pensiones*. Capitulo 11. Lima: Universidad di San Martin de Porres, 297-340.
- (87) “Towards a Pan-European Pension Framework: Concept, Structure and Realization”. 2015. In Jozsef Meszaros, ed. *European Pension System: Fantasy or Reality*. Budapest: Central Administration of National Social Insurance, pp. 50-70.
- (86) “GCC Labor Markets: Challenges and Policy Options”. 2015. In: Oxford Gulf Affairs: Gulf & Arabian Peninsula Studies Forum (eds). *Labor Market Dynamics in the GCC Countries*. OxGAPS: University of Oxford, pp. 30-31.
- (85) “How Much Savings or Insurance? The Role of Information, Knowledge and Psychological Factors in Determining the Mandate of Social Insurance Programs,” 2015. In M. Markus Frölich, David Kaplan, Carmen Pagés, Jamele Rigolini, and David Robalino (eds): *Social Insurance, Informality, and Labor Markets How to Protect Workers While Creating Good Jobs*. Oxford et al: Oxford University Press.

- (84) “The Implicit Pension Debt: Concept and Role in Pension Economics and Reform.” 2014. In Jozsef Meszaros, ed. *Pension Adequacy and Sustainability*. Budapest: Central Administration of National Social Insurance, pp. 9-35.
- (83) “Global Pension Systems.” 2014. In Sarah Harper and Kate Hamblin, eds. *International Handbook on Ageing and Public Policy*. Cheltenham, UK: Northampton, MA, USA: Edward Elgar, Chapter 8: 87-107.
- (82) “Early Lessons from Country Experiences with Matching Contribution Schemes.” 2013. In R. Hinz, R. Holzmann, N. Takayama, and D. Tuesta, eds. *Matching Contributions for Pensions: A Review of International Experience*, Chapter 1, pp. 3-26 (with R. Hinz and D. Tuesta).
- (81) “Participation in Mandated and Voluntary Social Risk Management Arrangements: The Role and Limits of Financial Education and Other Interventions”. 2013. In M. Froelich, D. Kaplan, C. Pages, J. Rigolini and D. Robalino, eds. *Social Insurance and Labor Markets: How to Protect Workers While Creating Good Jobs*. Oxford University Press for Inter-American Development Bank, Institute for the Study of Labor, and World Bank, pp. 147-179.
- (80) “Long-term Perspectives of Social Security Pensions – European and global vision”. 2013. In Jozsef Meszaros, ed. *Pension Systems in the Crisis: Response and Resistance*. Budapest: Central Administration of National Social Insurance, pp. 105-131.
- (79) “The Economics of Reserve Funds in NDC Schemes: Role, Means and Size to Manage Shocks”, in R. Holzmann, E. Palmer, and D. Robalino (eds), Volume 2, Chapter 20, DC: World Bank, 2013, pp. 343-358. (with E. Palmer and D. Robalino).
- (77) “Addressing the Legacy Costs in an NDC Reform: Conceptualization, Measurement, and Financing.” In R. Holzmann, E. Palmer, and D. Robalino (eds), Volume 2, Chapter 18, Washington, DC: World Bank, 2013, pp. 277-304 (with A. Jousten).
- (76) NDC in the Teens: Lessons and Issues, (with Ed Palmer), in R. Holzmann, E. Palmer, and D. Robalino (eds), Volume 1, Chapter 1, Washington, DC: World Bank, 2012, pp. 3-29.
- (75) Social Protection for Temporary Migrant Workers: what programs serve them best? In Irena Omelaniuk, ed. 2012. *Global Perspectives on Migrant and Development: GFMD Puerto Vallarta and Beyond*, A Publication by the Global Forum on Migration and Development, New York-Heidelberg: Springer, with Yann Pouget, pp. 61-85.
- (74) Global Pension Systems and Their Reform: Worldwide Drivers, Trends, and Challenges. In Tomas Franzén, 2012 ed., *A Decade of Challenges: A collection of essays on pensions and investments*. Stockholm: Andra AP-fonden, pp. 14-31.
- (73) Severance Pay under Review: Issues, Results, Policy Conclusions and Research Agenda in R. Holzmann and M. Vodopivec (eds.) chapter 1, op. cit, Washington, DC: World Bank, 2012 (together with M. Vodopivec), pp. 1-15.
- (72) Severance Pay Programs around the World: History, Rationale, Status, and Reforms, in R. Holzmann and M. Vodopivec, 2012, eds. chapter 2, op. cit, Washington, DC: World Bank, 2012 (together with Y. Pouget, M. Vodopivec and M. Weber), pp. 17-120.
- (71) Bringing Financial Literacy and Education to Low and Middle Income Countries, in Olivia Mitchell and Anamaria Lusardi. 2011, eds. *Financial Literacy: Implications for Retirement Security and the Financial Marketplace*. Oxford, UK: Oxford University Press, 255-267.

- (70): The Impact of the Financial Crisis on Pension Systems, in: Sudhir Rajkumar and Mark Dorfman, eds. *Governance and Investment of Public Pension Assets*, Washington, DC: World Bank, 2011 (together with Richard Hinz), 132-144.
- (69): Introduction, summary, and policy conclusions, in Robert Holzmann and Ufuk Guven , 2009, op.cit.
- (68) Will Population Aging Affect Rates of Return?, in Robert Holzmann, 2009, op. cit.
- (67) Were Financial Systems in CESE Countries Prepared for the Challenges of Multipillar Pension Reform? (with Csaba Feher and Hermann von Gersdorf), in Robert Holzmann, 2009, op. cit.
- (66) Linking Pension Reform to Labor and Financial Market Reforms: An Introduction, in: Robert Holzmann, Landis MacKellar and Jana Repansek, 2009, op. cit.
- (65) Vers une approche pan européenne des pensions: les promesses et les perspectives par les systèmes de comptes individuels, en Florence Legros (éd), *Le Retraites – Libres opinions d’experts européens*, Paris: Economica, 2007, 270-278.
- (64) Demographic Alternatives for Aging Industrial Countries: Increased Total Fertility Rate, Labor Force Participation, or Immigration, in: Almas Heshmati and Arno Tausch, 2007, eds.: *Roadmap to Bangalore? Globalization, the EU’s Lisbon Process and the Structures of Global Inequality*. New York: Nova, 253-283.
- (63) The World Bank and Pension Reform: From 'Averting the Old-Age Crisis' to 'Keeping the Promise of Old-Age Security' and Beyond, in Stephen J. Kay and Tapen Sinha, 2007, eds. *Lessons from Pension Reform in the Americas*, Oxford-New York: Oxford University Press, 177-184.
- (62) Demographic Alternatives for Aging Industrial Countries: Increased Total Fertility Rate, Labor Force Participation, or Immigration, in: *G-20 Workshop on Demographic Challenges and Migration*, 26-27 August 2005, Sydney, 2006, Canberra: Commonwealth of Australia. [www.treasury.gov.au](http://www.treasury.gov.au).
- (61) Portability Regimes of Pension and Health Care Benefits for International Migrants: An Analysis of Issues and Good Practices. 2006, *Global Migration Perspectives*. Geneva: Global Commission on International Migration, with Johannes Koettl, and Taras Chernetsky.
- (60) Challenges and Opportunities of International Migration for Europe and its Neighborhood, in: Joakim Plame and Kristof Tamas, eds. 2006. Conference volume, Stockholm (Institute for Futures Studies).
- (59) The status of the NDC Discussion: Introduction and Overview, in Robert Holzmann and Edward Palmer. (2006, eds.) *Pension Reform: Issues and Prospect for Non-Financial Defined Contribution (NDC) Schemes*. World Bank, Washington, D.C.
- (58) Toward a Reformed and Coordinated Pension System in Europe: Rational and Potential Structure, in Robert Holzmann and Edward Palmer. (2006, eds.) *Pension Reform: Issues and Prospect for Non-Financial Defined Contribution (NDC) Schemes*. World Bank, Washington, D.C.
- (57) Perspectivas y tendencias internacionales en las reformas a los sistemas de pensiones, CONSAR (2006): Avances, experiencia Internacional y Retos de los Sistemas de Ahorro para el Retiro, Ponencias de la Conferencia con motivo del Décimo Aniversario de la CONSAR, desarrollada en la Ciudad de México el 5 de octubre de 2004, México (CONSAR): 153-167.
- (56) Old-Age Income Support in the Twenty-first Century: Conceptual Framework and Selected Issues of Implementation, in Gerard Carprio, James A. Hanson, and Robert E. Litan (2005, eds) *Financial Crisis:*

Lessons from the Past, Preparations for the Future, Brookings Institutions Press: Washington., D.C.: 257-278.

(55) Poverty, migration and employment in South-East Europe: What can the data tell us? In: K. Liebscher, J. Christl, P. Mooslechner, and D. Ritzerger-Gruenwald (eds. 2005): *European Economic Integration and South-East Europe – Challenges and Prospects*, Cheltenham, UK – Northampton, MA: Edward Elgar, 281-304.

(54) Social Risk Management: A new conceptual framework for social protection, and beyond, in: R. Agarwala, N. Kumar and M. Riboud (2004, eds.): *Reforms, Labor Markets and Social Security in India*, New Delhi: Oxford University Press, 23-59, with S. Jorgensen.

(53) Risk and Vulnerability: The forward looking Role of Social Protection in a Globalizing World, in: E. Dowler and P. Mosely (2003, eds.): *Poverty and Social Exclusion in North and South*, London and New York (Routledge).

(52) Reducing Poverty: The Role of Social Protection and Social Risk Management, in: Ortiz, I. (2003, ed.): *Defining the Agenda for Poverty Reduction*, Proceedings of the First Asia and Pacific Forum on Poverty, Manila (Asian Development Bank), 3-32.

(51) Accelerating the European Pension Reform Agenda: Need, Progress, and Conceptual Underpinnings, in: R. Holzmann, M. Orenstein and M. Rutkowski (2003, eds): *Pension Reform in Europe: Process and Progress*, Washington, D.C. (The World Bank), 1-45 (with L. MacKellar and M. Rutkowski).

(50) A Provocative Note on Coverage in Public Pension Schemes, in: Tausch, A. (2003, ed.): *The Three Pillars of Wisdom – A Reader on Globalization, World Bank Pension Models and Welfare Society*, New York (Nova Science Publisher), 85-99.

(49) Die Reform der Alterssicherung in Österreich, in: Theurl, E., H. Winner and R. Sausgruber (2002, Hrsg): *Kompodium der österreichischen Finanzpolitik*, Wien-New York (Springer), 507-542, with K. Heitzmann.

(48) La gestion du risque social: un cadre théorique pour la protection social, en: Palier B. et Viossat, L-Ch. (2001, eds): *Politiques Social et Mondialisation*, Paris (Edition Futuribles), 25-45.

(47) La reforme des retraites: l'approche de la Banque mondiale, en: Palier B. et Viossat, L-Ch. (2001, eds): *Politiques Social et Mondialisation*, Paris (Edition Futuribles), 91-113.

(46) Öffentlicher Sektor: Finanz- und Sozialpolitik, in: Neck, R., Nowotny, E. und Winckler, G. (2001, Hrsg.): *Grundzüge der Wirtschaftspolitik Österreichs*, Wien (Manz), 3. Auflage, with B. Genser.

(45) Die Herausforderungen kapitalgedeckter Renten liegen im Detail, in: Ramser, H-J. et al. (Hrsg.): *Wirtschaftspolitische Herausforderungen an der Jahrtausendwende*, Ottobeuren Wirtschaftswissenschaftliches Seminar, 249-266.

(44) Individual Accounts as Social Insurance: A World Bank perspective, in: Scheil-Adlung X. (2001, ed.): *Building Social Security – The Role of Privatization*, ISSA (Geneva), with R. Palacios, 45-61. (Also available in German, Spanish and French).

(43) Extending Coverage in Multipillar Systems: Constraints and Hypotheses, Preliminary Evidence and Future Research, in: Holzman – Stiglitz (2001, eds.): *New Ideas for Old-Age Security*, Washington, D.C. (The World Bank), with T. Packard und J. Cuesta, 452-484.



- (42) Ökonomische Aspekte und Umfang der impliziten Pensionsschulden: Eine internationale Perspektive, in Neck et al. (Hrsg.): *Staatsschulden am Ende? Ursachen, Wirkungen und Zukunftsperspektiven*, Schriftenreihe des Ludwig Boltzmann Instituts zur Analyse wirtschaftspolitischer Aktivitäten, Bd. 17, Wien: Manz, 2000.
- (41) Pension Reform, Financial Market Development, and Economic Growth: Preliminary Evidence from Chile, in: Z. Bodi and P. Davis (2000, eds.): *The Foundations of Pension Finance*, Cheltenham, UL. And Northampton, MA (Edward Elgar), (Reprint of 1997 IMF Staff Paper).
- (40) Social Risk Management: The World Bank's New Conceptual Framework, in: *The New Social Policy Agenda in Asia – Proceedings from the Manila Social Forum*, Manila (Asian Development Bank and World Bank), 2000, 99-101.
- (39) Soziales Risikomanagement: Ein neuer konzeptueller Ansatz fuer Soziale Sicherheit, in: Schmaehl, W. (2000, Hrsg.): *Soziale Sicherung zwischen Staat und Markt*, Schriftenreihe des Vereins fuer Sozialpolitik, Band 275, Berlin (Duncker & Humblot), mit Jorgensen, S., 9-46.
- (38) On the Economic Benefits and Fiscal Requirements of Moving from Unfunded to Funded Pensions, in: Buti, M., Franco, D. and Pench, L. (1999, eds.): *The Welfare State in Europe*, Cheltenham, UL. And Northampton, MA (Edward Elgar), 139-196 (Reprint of 1997 Paper).
- (37) Gesamtwirtschaftliche Probleme der Europäischen Wirtschafts- und Währungsunion und wirtschaftspolitische Antworten: Einleitung und Übersicht, in: Neck, R. und Holzmann, R. (1999, Hrsg.): *Was wird aus Euroland?*, Schriftenreihe des Ludwig Boltzmann Instituts zur Analyse wirtschaftspolitischer Aktivitäten, Bd. 15, Wien (Manz), 13-23.
- (36) On the Economic Benefits and Fiscal Requirements of Moving from Unfunded to Funded Pensions, in: *The Future of the Welfare State – Challenges and Reforms*, European Economy – Report and Studies No. 4, 1997, 121-163.
- (35) Economic Implications of Eastern European Reforms on Western European Economies, in: Kindley, R. and Good, D. (1997, eds.): *Internationalization and Institution-Building in the New Europe - The Experience of Small States*, Dordrecht-Boston-London (Kluwer), 21-51.
- (34) Reforma de las pensiones y ahorro nacional: la experiencia chilena, in: *Ahorro Nacional: La Clave para un Desarrollo Sostenible en América Latina*, Instituto de Relaciones Europeo-Latinoamericanas, Madrid (IRELA), 221-247.
- (33) Exportchancen und Importschocks: Eine Untersuchung zur (A)symmetrie der Handelsanpassung der OECD-Länder im Gefolge der Marktöffnung in Mittel- und Osteuropa, in: Holzmann, R. und Neck, R., (1996, Hrsg.): *Ostöffnung: Wirtschaftliche Folgen für Österreich*, 193-235.
- (32) Öffentlicher Sektor: Finanz- und Sozialpolitik, in: Nowotny, E. und Winckler, G. (1996, ed.): *Einführung in die Wirtschaftspolitik*, Wien (Manz), 2nd edition, with B. Genser.
- (31) The Maastricht Fiscal Criteria: Required but Ineffective?; in: Holzmann, R. (1996, ed.): *Maastricht: Monetary Constitution without Fiscal Constitution*, Schriftenreihe des Europa-Institut, Sektion Wirtschaftswissenschaft, Baden-Baden (Nomos), Vol. 3., with Y. Hervé and R. Demmel.
- (30) Externer Nachfrageschock und makroökonomische Anpassungsreaktionen: Untersuchungen für das Saarland, in: Holzmann, R. (1996, Hrsg.): *Löhne und Beschäftigung - Untersuchungen für die BRD*,

Schriftenreihe des Europa-Institut, Sektion Wirtschaftswissenschaft, Baden-Baden (Nomos), Vol. 2., pp. 119-170

(29) Lohn- versus Einkommenssubvention: Beschäftigungs- und Verteilungseffekte in einem einfachen Gleichgewichtsmodell, in: Holzmann, R. (1996, Hrsg.): *Löhne und Beschäftigung - Untersuchungen für die BRD*, Schriftenreihe des Europa-Institut, Sektion Wirtschaftswissenschaft, Baden-Baden (Nomos), Vol. 2., with Holger Meinhardt, pp. 171-213.

(28) Öffentlicher Sektor: Finanz- und Sozialpolitik, in: Nowotny, E. und Winckler, G. (1994, Hrsg.): *Einführung in die Wirtschaftspolitik*, Wien (Manz), mit B. Genser, pp. 203-248.

(27) Economic Aspects of Pension Reform in OECD Countries, in: Wolfe, B.L. (1994, ed.): *On the Role of Budgetary Policy During Demographic Changes*, The Hague/Koenigstein (Foundation Journal Public Finance), p. 293 - 308.

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Risk and Vulnerability: The forward looking Role of Social Protection in a globalizing World, World Bank SP Discussion Paper Series, Discussion Paper No. 0109, June.

Pension Systems in East Asia and the Pacific: Challenges and Opportunities, World Bank SP Discussion Paper Series, Discussion Paper No. 0014, June.

Can Investments in Emerging Markets Help to Solve the Aging Problem?, World Bank SP Discussion Paper Series, Discussion Paper No. 0010, March.

Social Risk Management: A new conceptual framework for social protection, and beyond, World Bank SP Discussion Paper Series, Discussion Paper No. 0006, February, with S. Jorgensen.

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Extending Coverage in Multi-Pillar Pension Systems: Constraints and Hypotheses, Preliminary Evidence and Future Research Agenda, World Bank SP Discussion Paper Series, Discussion Paper No. 9924, January, with Packard, T. and Cuesta, J.

Macroeconomic Convergence and Qualification for EMU: The Impact on Financial Market Sanctioning, Research Paper of the European Institute 9901, Universität des Saarlandes, Saarbrücken, mit Demmel, R. und Hervé, Y.

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Financing the Transition to Multi-Pillar, World Bank SP Discussion Paper Series, Discussion Paper No. 9814, September 1998.

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On Economic Benefits and Fiscal Requirements of Moving from Unfunded to Funded Pensions, Forschungsbericht 9702, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, Januar 1997.

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Externe Nachfrageschocks und makroökonomische Anpassungsreaktionen: Untersuchungen für das Saarland, Europa-Institut der Universität des Saarlandes, Forschungsbericht 9601, Mai 1996.

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Current and Prospective Structural Changes in European Economies: Implications for Labour Markets and Social Policies, Forschungsbericht 9502, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, August, with Yves Hervé..

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Funded and Private Pensions for Eastern European Countries in Transition, Forschungsbericht 9406, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, April.

Pressures to adjust: Consequences for the OECD countries from reforms in Eastern Europe, European Institute - University of Saarland, Research Paper 9301, together with A. Petz and Ch. Thimann.

What policy-mix may overcome the current output decline in Central and Eastern Europe, Austrian National Bank Working Papers No. 9, 1992, with G. Winckler, October.

Bereit für den EWR? Die österreichische Finanzpolitik in den Jahren 1989 und 1990, Forschungsbericht 9211, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, August, zusammen mit B. Genser.

Reforming Old-Age Pension Systems in Central and Eastern European Countries in Transition: Necessity and Chance, Forschungsbericht 9207, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, May.

Die Neugestaltung des staatlichen Budgetwesens: Notwendigkeit und Erfahrungen in mittel- und osteuropäischen Ländern im Übergang, Forschungsbericht 9117, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, September.

Adapting to Economic Change: Reconciling Social Protection with Market Economies, Forschungsbericht 9113, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, August.

Tax Reform in Countries in Transition: Central Policy Issues, Forschungsbericht 9112, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, August.

The Provision of Complementary Pensions: Objectives, Forms and Constraints - Background and Policy Considerations for the Discussion in the CSFR, Forschungsbericht 9101, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, April.

Budgetary Subsidies in Centrally Planned Economies in Transition, IMF WORKING PAPER, WP/91/11, Washington, D.C., January 1991.

Unemployment Benefits During Economic Transition: Background, concept and implementation, Forschungsbericht 9010, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, Oktober.

Budgetary Issues of Subsidy Reduction when Moving from Plan to Market, Forschungsbericht 9006, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, September.

The Welfare Effects of Public Expenditure Programs Reconsidered, IMF WORKING PAPER, WP/89/62, Washington, D.C., August 1989.

Internationaler Vergleich von Alterssicherungssystemen: Konzepte, Strukturen und ökonomische Effekte, Forschungsbericht 8905, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, August.

Pension Policies in the OECD Countries: Background and Trends, IMF WORKING PAPER, WP/88/85, Washington, D.C., October 1988.

Die finanzpolitische Entwicklung in Österreich in den Jahren 1985 und 1986, Forschungsbericht 8803, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, Februar 1988, gem. mit B. Genser.

Zu den Beziehungen zwischen Alterssicherungs- und Arbeitsmarktpolitik, Forschungsbericht 8718, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, Oktober.

Demographische Entwicklung und Sozialausgaben, Forschungsbericht 8717, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, September, gem. mit P.Findl und R.Münz.

Zu den ökonomischen Effekten der österreichischen Pensionsversicherung: Einkommensersatz, Ruhestandsentscheidung und interne Ertragsraten, Forschungsbericht 8714, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, September 1987.

Revenue structure and development of general public pension schemes in OECD countries, Forschungsbericht 8708, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, Mai.

Tendenzen der Altersvorsorge in den Ländern der OECD, Forschungsbericht 8706, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, Mai 1987.

Ageing and Social Security Costs, Forschungsbericht 8703, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, April 1987.

Neue langfristige Lösungsmuster zur Verwirklichung von Abfertigungszielsetzungen, Forschungsbericht 8612, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, November 1986.

Die österreichische Finanzpolitik in den Jahren 1983 und 1984, Forschungsbericht 8603, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, Juni 1986, gem. mit B. Genser.

Comparative Analysis of Financing Methods for Highways in European Countries, Forschungsbericht 8601, Ludwig Boltzmann Institut für ökonomische Analysen wirtschaftspolitischer Aktivitäten, January 1986, 25 S, gem. mit A. Van der Bellen.

Income Distribution and Imperfect Markets: A New Welfare-Based Measure for Life-Time Considerations, Working Paper 8410, Department of Economics, University of Vienna, December 1984, 23S.

Die österreichische Finanzpolitik der Jahre 1981 und 1982, Working Paper 8403, Department of Economics, University of Vienna, April 1984, 30 S, gem. mit B. Genser.

Budgetary and related policies in Austria. An approach to cyclical policy and structural change by institutional arrangements and governmentally supported competition, Working Paper 8304, Department of Economics, University of Vienna, 1983, 25 S.

Finanzausgleich in Österreich, R.M. Institut für Gesellschafts- und Wirtschaftswissenschaften der Universität Bonn, Juli 1980, 67 S, gem. mit D. Bös und B. Genser.

Einkommensteuerreform: Eine quantitative Analyse, Arbeitshefte der Wirtschaftsuniversität Wien, November 1979, 48 S, gem. mit B. Genser.

Die finanzpolitische Entwicklung in Österreich, 1975-1978, R.M. Institut für Gesellschafts- und Wirtschaftswissenschaften der Universität Bonn, 1979, 37 S, gem. mit D. Bös und B. Genser.

Optimal Quality for a Public Enterprise, R.M. Institut für Gesellschafts- und Wirtschaftswissenschaften der Universität Bonn, 1979, 23 S, gem. mit D. Bös und B. Genser.

Untersuchungen zur österreichischen Einkommensverteilung I. Die unselbständigen Arbeitseinkommen - Messung und Entwicklung, Veröffentlichungen des Instituts für Statistik der Universität Wien, 1978, 80 S, gem. mit G. Pflug und R. Vetschera.

## **7. Papers Pending Publication, under Revision or Preparation**

The Five Challenges of Systemic Pension Reform. Paper presented at the International Conference on Pension Reform, October 2017, Beijing.

NDC Schemes and the Labor Market: The challenges of formal employment and delayed retirement (revised version March 2018, with David Robalino and Hernan Winkler)

The Payout Phase of Pensions: Trends, issues, key challenges, and the role of government (revised draft Nov 2016)

Addressing Labor Market and Other Distortions in GCC Countries: The Citizen's Income Proposal (last version May 20, 2014)

### III. Conferences, Workshops, Speeches, and Presentations (selection)

- Sep 2018 Chinese pension reforms revisited: Local and global challenges. CASS: International Conference on Development Economics in China: 40th Anniversary of Reform and Opening-up, Shanghai  
Public Pension' Trends in OECD Countries, and Beyond. International Conference on Challenge and Task of Civil Service Pension Scheme, Jeju, South Korea
- May 2018 Objectives, Drivers and Trends in Pension Reform: International Lessons, Pension Reform Workshop, Riyadh
- Nov 2017 DC Schemes and the Labor Market: The challenges of formal employment and delayed retirement. Pensions and Superannuation Seminar, CEPAR, University of New South Wales.
- Oct 2017 Five key Challenges of Systemic Pension Reform: Funding, Individualization, Labor Market, Poverty Issues, and Political Economy, Sichuan University, Chengdu  
Five Key Challenges of Systemic Pension Reform: Funding, Individualization, Labor Market, Poverty Issues, and Political Economy, South West University of Economics and Finance, Chengdu  
Pension Schemes' Objectives and Multi-pillar Design, Conference on Multi-tier Pension System, CAoSS, Beijing  
Challenges of Systemic Pension Reform: Funding, Individualization, Poverty Issues, and Political Economy, International Workshop on Pension Reform, CASS, Beijing  
International Retirement Migration: Trends, issues, and options, Third International Conference on Social Protection, University of Malaysia, Kuala Lumpur  
NDC Schemes and the Labor Market: The challenges of formal employment and delayed retirement, NDC III Conference, Rome  
NDC Schemes and Heterogeneity in Longevity: Proposals for Re-design, NDC III Conference, Rome  
Taxing Pensions in a Globalizing World: Issues, Options and NDC/NDC Comparison, NDC III Conference, Rome
- April 2017 Heterogeneity in Longevity: Dimensions, Scope, and Implications for Pension System Design and Reform, CASS Business School, City, London  
Assessing the Portability of Social Security Benefits: Policy Reflections from Four Migration Corridors Between EU and Non-EU Member States, Ageing and Migration Seminar Series, London School of Economics, London
- March 2017 Migration policies, integration strategies and cooperation practices, Conference on Migration as a Driver of Economic Development, Milano
- Dec 2016 Managed Migration: A growth option for Afghanistan? World Bank Seminar Series, Washington, DC.

- Triangulating the Saudi Labor Market: Design and Results from Three Integrated Labor Market Surveys on Nationals, Expats and Firms, GCC BROWN BAG BREAKFAST SERIES, Washington, DC.
- The Taxation of Internationally Portable Pensions: Fiscal Issues and Policy Options, IMF/FAD-EPD Seminar, Washington, DC.
- Heterogeneity in Longevity: Dimensions, Scope, and Implications for Pension System Design and Reform, The Social Protection, Labor & Jobs Global Practice Seminar, World Bank, Washington, DC.
- Nov 2016 Heterogeneity in Longevity: Dimensions, Scope, and Implications for Pension System Design and Reform, Pension and Superannuation Seminar, CEPAR, UNSW, Sydney.
- Oct 2016 Understanding the labor market in Saudi Arabia: Issues and Policy Directions, World Bank-National Labor And Social Development Observatory: Saudi Labor Market Workshop, Riyadh
- The Role of Managed International Labor Migration in the Growth and Development Prospects of Afghanistan, World Bank Seminar Series: Navigating Risk and Uncertainty in Afghanistan, Kabul
- Managed Migration: A growth option for Afghanistan? Forum Finanz, Vienna
- Sep 2016 Policy issues in pension saving, Conference on Financial Literacy and Pension-related Communication for better Retirement and Long-term Financial Decisions, Turin
- June 2016 Assessing the Portability of Social Security Benefits: Policy Reflections from Four Migration Corridors Between EU and Non-EU Member States, OECD Development Centre “DEV TALKS” Series, Paris
- May 2016 Sustainable Pensions: Global Reform Trends and Challenges, The 7<sup>th</sup> Asian Leadership Conference, Seoul
- April 2016 The Taxation of Internationally Portable Pensions: An Introduction to Fiscal Issues and Policy Options, Tesoro Italiano, Rome // University of Tor Vergata, Rome
- Do Bilateral Social Security Agreements Deliver on the Portability of Pensions and Health Care Benefits, INPS, Rome
- Mar 2016 Triangulating the Saudi Labor Market: Surveying firms, nationals and expats, LSE Workshop on “The Political Economy of Labor Markets and Migration to the Gulf, Kuwait.
- Feb 2016 Proposal for a Labor Market Distance Index, Technical Workshop on Three Labor Market Surveys in Saudi Arabia, Riyadh.
- Dec 2015 The Role of Projections, Analyses, and Country Experiences for Social Insurance Development, Farewell Conference for Ed Palmer, Swedish Social Insurance Fund, Stockholm.
- Nov 2014 Do Bilateral Social Security Agreements Deliver On the Portability of Pensions and Health Care Benefits? Seminar – Social Protection Global Practice, World Bank, Washington, DC.
- Sep 2015 The Taxation of Internationally Portable Pensions: Everything goes, for what reason, and with some possible solutions, 2nd CESifo & CEPAR Workshop on the Taxation of Pensions, Munich (Bernd Genser presented joint paper)



- Aug 2015 Taxing Pensions of an Internationally Mobile Labor Force: Portability Issues & Taxation Options. Taxation in a Global Economy, 71<sup>st</sup> IIPF Conference, Dublin.
- June 2015 Do Bilateral Social Security Agreements Deliver on Portability: A Summary Policy Paper on Four Migration Corridors. Client Consultation Workshop on Portability, Marseille Center of Mediterranean Integration, Marseille.
- May 2015 Addressing Longevity Risk through Private Annuities: Issues and Options. 13<sup>th</sup> International Workshop on Pension Insurance and Savings, Paris IX, Dauphine.
- Mar 2015 EPF Sample Data: Structure, Content and First Analysis. Data Launch Workshop, Scoail Security Research Center, University of Malaya.
- Addressing Longevity Risk through Private Annuities: Issues and Options. Public Lecture, University of Malaya.
- Social Protection and Retirement Income Policy: Objectives, Concepts, and Challenges. Faculty of Economics and Public Administration, University of Malaya
- Feb 2015 On the Political Economy of Pension Reforms. EU - China Social Protection Reform Project. International Seminar, Brussels.
- Jan 2015 Portability of Social Benefits: Issues, Facts, and Concepts; DG Employment and Social Affairs, Brussels.
- Dec 2014 Intra- und intergenerative Umverteilung bei unvollkommenen Maerkten und die Rolle staatlicher Programme; Masse fuer interpersonelle und intergenerative Verteilungsgerechtigkeit von Pensionssystemen: Die Rolle der internen Ertragsrate, Workshop: Inter- und intragenerative Gerechtigkeit von Abgaben- und Transfersystemen, Wien.
- Migration, Population Aging and Youth Employment: Myths and Challenges; Second International Conference on Social Security University of Malaya, Social Security Research Center, Kuala Lumpur, December.
- Old-Age Financial Protection: Conceptual base, regional experience, and reflections on Malaysia; Presentation to YB Senator Wahid Minister in the Prime Minister's Department, Putrajaya.
- Nov 2014 Taxing Pensions of an Internationally Mobile Labor Force: Portability Issues & Taxation Options; CEPAR & CESifo Workshop on "Pension Taxation, Population Aging and Globalization", UNSW, Sydney.
- Oct 2014 Does living longer mean working longer and living better? (Session 3), Which way forward for pension policy analysis in OECD countries? OECD, Paris.
- Sep 2014 Pension and Politics (session 4), Pensions for the 21<sup>st</sup> century, Warsaw School of Economics, Poland/
- Toward a Pan European Pension System: Concept, Structure and Realization, Budapest Pension Seminar 2014 – European Pension System: Fantasy or Reality, Central Administration of National Pension Insurance Hungary, Budapest.
- Aug 2014 Designing Pension Systems for Aging Societies: Drivers, Criteria, and Choices 70th Annual Congress of the IIPF, Lugano, Switzerland

- Jul 2014 Implicit Pension Debt: Its Concept and Role in Pension Economics and Policy Reform. The Social Protection and Labor and the Finance and Markets Global Practices BBL, World Bank, Washington, DC.  
Addressing Longevity Risk through Private Annuities: Issues and Options. 22nd Annual Colloquium of Superannuation Researchers, CEPAR and ABS' School of Risk and Actuarial Studies, New South Wales University, Sydney.
- June 2014 Old-Age Financial Protection in Malaysia: Challenges and Options, EPF, Kuala Lumpur  
The International Portability of Social Benefits: A selective introduction, OECD, Paris
- April 2014 Objective Driven Smart Migration Management; Successes and Limits of Current Economic Model; etc, Regional Workshop on Labor Admission Policies in GCC Countries, Abu Dhabi, UAE.
- Mar 2014 20 years after "Averting the Old-Age Crisis", Brown Bag Seminar, ILO, Geneva.  
Workshop on the EPF Data Sample: Structure, Content and First Analysis, University of Malaya, Kuala Lumpur
- Feb 2014 Gathering Evidence Base for Policy Design: Three Integrated Labor Market Surveys; Strengthening Policy Design: Application of Behavioral Economics. Special Session: Show Casing Recent Employment Policy Initiatives in Saudi Arabia for Better Saudization Outcomes. Second Arab Forum for Development and Employment: Towards Social Protection and Sustainable Development, Riyadh, Saudi Arabia.
- Jan 2014 Langfristige Finanz- und Umweltrisiken. Austrian Academy of Science, Vienna.
- Dec 2013 Addressing longevity through private annuities: Issues and options, Invited Lecture: CINTIA (Centro Interuniversitario Netspar Italy) Kick-off Conference, Venice, 13-14 December.  
An optimistic outlook on population ageing and old-age financial protection, Austrian Academy of Science/Pension Initiative, Vienna.
- Nov 2013 Financial Literacy: Knowledge and other constraints for effective participation in pre-funded pension plans, CEPAR-RIPPA conference on Pre-funded Pension Plans: Theory, Practice, and Issues - "Does Pre-funding Work?" UNSW, Sydney.
- Sept 2013 The Implicit Pension Debt: Concept and Role in Pension Economics and Policy Reform, Pension Adequacy and Sustainability Conference, Budapest, September 19  
A National Pension System for the Homo-Hundred Area, Retirement Strategy Forum 2013, Seoul, September 26.
- Aug 2013 Coordinating European Pension Policies – A Bridge so Near? Alpbacher Perspectives, European Forum Alpbach  
Social Insurance and Labor Markets: Behavior and Redistribution, 8<sup>th</sup> IZA/World Bank Conference Employment and Development, Bonn, August 22.
- June 2013 Population Aging and Retirement Income Systems: Issues, Choices and Selection, Public Lecture, University of Malaya, Kuala Lumpur, June 25.

- Financial Capability in Low- and Middle income Countries: Measurement and Evaluation, Report presentation, Empower Consumers of Financial Products and Services through Improving Financial Literacy/Capability and Effective Consumer Protection, Hosted by G20 Russia Presidency, OECD, World Bank, Moscow
- Global Pension Systems and Their Reform: Worldwide Drivers, Trends, and Challenges, Public Finance Lecture, Generali Seminar, Trieste, June 6.
- May 2013 Global Pension Systems and Their Reform: Worldwide Drivers, Trends, and Challenges, Public Finance Lecture, University of Klagenfurt
- April 2013 Matching Contributions for Pensions: A Review of International Experience, Seminar & Book Launch, University of Malaya.
- March 2013 Designing fiscally sustainable and equitable pension systems in emerging Europe in the post-crisis world, Panel participation, IMF FAD-European Department Conference, JVI, Vienna
- Nonfinancial Defined Contribution Pension Schemes in a Changing Pension World: Lessons and Issues, Seminar, Banca D'Italia, Rome, March 20.
- Feb 2013 Portability of Pension, Health, and other Social Benefits: Facts, Concepts, Issues. ICMDBP Workshop, Prague, February 9.
- Jan 2013 Financial Literacy & Education in Low and Middle Income Countries: Measurement and Effectiveness, OECD-World Bank conference on Financial Literacy and Education, Nairobi.
- Dec 2012 Multi-pillar Pension System After 18 Years: What Has Been Learned? Public Lecture, EPF Seminar Series, Kuala Lumpur
- NDC Pension Scheme in a Changing Pension World, University of Malaya, Kuala Lumpur.
- Nov 2012 Matching Defined Contribution Schemes: Role and Limits to Increase Coverage in Low and Middle Economic Countries, LACEA/LAMES 2012, Lima-Peru
- NDC Pension Scheme in a Changing Pension World, LACEA/LAMES 2012, Lima-Peru
- Financial Literacy & Education in Low and Middle Income Countries: Measurement and Effectiveness, OECD-World Bank conference on Financial Literacy and Education, Cartagena
- Oct 2012 Global Pension Systems and Their Reform: Worldwide Drivers, Trends, and Challenges, South-Western University of Economics and Finance, and Sichuan University; both Chengdu, China
- Sept 2012 Global Pension Systems and Their Reform: Worldwide Drivers, Trends, and Challenges, European Institute for Social Security Annual Conference, Budapest
- NDC Publication Launch Seminars in Budapest, Vienna and Brussels
- World Bank Workshop on Designing Labor Market Surveys in GCC countries, Riyadh, KSA
- July 2012 Portability of Pension, Health, and other Social Benefits: Facts, Concepts, Issues. CESifo Venice Summer Institute. Workshop on Portability of Social Benefits, Venice, Italy.
- A Global Perspective on Population and Old Age Financial Protection. International Conference on Population Ageing: Issues and Challenges, University of Malaya, Kuala Lumpur, Malaysia.

- June 2012 Global Pension Systems and Their Reforms: World Wide Drivers, Trends, and Challenges; Financial Markets in Times of Crisis, Symposium – Austrian Academy of Science, Vienna
- May 2012 Should Other Countries Imitate The Italian Pension Scheme? Festival ECONOMIA Trento, Italy  
Riding the Population Wave: Policy Perspectives; Panel Discussion – Population Event Europe, Warsaw  
Participation in Mandated and Voluntary Social Risk Management Arrangements: The Role and Limits of Financial Education and Other Interventions BBL, World Bank, Washington, DC
- April 2012 Matching Defined Contribution (MDC) Schemes: On their Role and Limits to Improve Benefit Coverage and Reduce Informality in Low- and Middle Income Countries, BBL, World Bank, Washington, DC
- March 2012 Eine Karriere als Volkswirt in internationalen Organisation: OECD, IWF, Weltbank; Universität Graz  
Labor Market Distortions and Pension Schemes: Are NDCs the Solution?, Social Policy Seminar; University of Graz  
“Reforming Severance Pay: An International Perspective”; Motivation and Key Messages; Center of Excellence in Finance Ljubljana
- Feb 2012 Reform der Abfertigungszahlungen: Eine Internationale Perspektive; IHS-Europaeisches Zentrum, Wien
- Dec 2011 Der Euro: Gestern, Heute, Morgen? Konferenz über die Zukunft der Gemeinschaftswährung, Wien.
- Nov 2011 The Challenge of Population Aging: Rethinking and Reforming Institutions, Policies, Markets, University of New South Wales, Sydney.  
Reforming Severance Pay: An International Perspective. LACEA Annual Meeting, University of Adolfo Ibanez, Santiago de Chile.  
Reforming the System of Admission for Migrants Workers in the UAE: Lessons on Migration Management and Related Labor Market Implications, MNA Office of the Chief Economist Seminar, World Bank, Washington, DC.  
Admission Schemes for Foreign Workers: A Labor Market Tool for National Economic Development, Joint HDNSP & MNDHD BBL, World Bank, Washington, DC.  
Enhancing Financial Literacy and Education in Low and Middle Income Countries, Joint World Bank-OECD-Financial Education Fund Workshop on the Impact Evaluation Methods For Financial Capability Enhancement Programs, Cape Town, South Africa.
- Sept 2011 The Conceptual Foundations of Pension Systems and Reforms, ITC-ILO Summer School, Turin.
- June 2011 The Role of MDC Approach in Improving Pension Coverage, Workshop on the Potential for Matching Defined Contribution (MDC) Schemes, World Bank, Washington, DC.  
Severance Pay Programs around the World: History, Rationale, Status, and Reforms, HDNSP BBL, World Bank, Washington, DC.

- Severance Pay Programs around the World: History, Rationale, Status, and Reforms, Joint European Center – HIS International Seminar, Vienna.
- May 2011 Participation in Mandated Social Insurance Schemes: The Role and Limits of Financial Education and Related Interventions, 6<sup>th</sup> IZA Conference on Employment and Development, Mexico City.
- Reforming European Pensions: Trends, New Challenges, and Common Options, 2<sup>nd</sup> International Conference on Pension Reform: How to Proceed, Prague.
- March 2011 A Career as an Economist in International Organizations: World Bank, IMF and OECD. Career Day, University of St. Gallen.
- Nov 2010 Bringing Financial Literacy and Education to Low and Middle Income Countries: The Need to Review, Adjust, and Extend Current Wisdom, Retirement Commission, Wellington
- Social Protection for Temporary Migrants, Conceptual Framework, Country Inventory, Assessment and Guidance, Victoria University, Wellington.
- Portability of Pension, Health, and other Social Benefits: Facts, Concepts, Issues. University of New South Wales, Sydney
- The Importance of Segmentation: Do Social Differences Affect Financial Behavior and Do We Know Anything About it? CITI-FT FINANCIAL EDUCATION SUMMIT 2010 Sydney
- Social Protection for Temporary Migrants, Conceptual Framework, Country Inventory, Assessment and Guidance, DEEWR, Canberra
- Oct 2010 NDC Pension Systems: Progress and New Frontiers in a Changing Pension World, Buenos Aires.
- Sep 2010 Innovations in Pension System' Reforms: Social Pensions, NDC, and MDC. Sixth International Conference on Social Security, Chengdu.
- June 2010 Portability of Pension, Health, and other Social Benefits: Facts, Concepts, Issues. European Center/Institute for Advanced Studies International Seminar Series, Vienna
- May 2010 Recovery with Employment, 5<sup>th</sup> IZA-World Bank Research Conference on Employment and Development, Cape Town, May 3-4.
- April 2010 Bringing Financial Literacy and Education to Low and Middle Income Countries, Pension Research Council Conference, Wharton, April 28-29.
- March 2010 Migration Management, in the Mediterranean Region: Taking Stock, Reviewing, and Looking Ahead, Guidance Workshop on Managing Migration, Marseille Center for Mediterranean Integration, Marseille, March 8-9, 2010
- Portability of Pension, Health, and other Social Benefits: Facts, Concepts, Issues, Guidance Workshop on Portability, Marseille Center for Mediterranean Integration, Marseille, March 10, 2010

- Feb. 2010 Economic Crisis and Pension Systems: Regional Developments and International Lessons, Warsaw School of Economics. Joint World Bank – UNDESA Workshop on Aging and Pension Reform, Minsk, Belarus.
- Ethik und globale Entwicklungen in Zeiten der Wirtschaftskrise, „Klagenfurter Stadtgespräche“, Alpen-Adria-Universität Klagenfurt.
- Dec. 2010 Les Transferts Monétaires Conditionnels, Protection Sociale à travers les Comptes d’Épargne Individuels, Conférences Futurible - Inventions Sociales, Paris.
- Nov. 2010 Toward a Concept of the Role and Limits of Financial Capabilities and Education with a focus on application to low and middle income countries, World Bank – OECD Workshop on Measuring Financial Capability and the Effectiveness of Financial Education, Washington, DC
- Sept 2009 Opportunities and Constraints for Long Term Saving in Low Income Countries, Conference on Promoting Financial Capability and Consumer Protections: A step toward financial inclusion in Africa, Accra, Ghana.
- June 2009 Policy Issues and Responses in Perspective. Symposium on Public Pension Governance and Investment, June 1-3, 2009 Bali, Indonesia.
- Social Protection Responses to the Three Waves of Crisis: Finance, Food & Fuel, South-South Learning Forum 2009, Cairo, Egypt.
- May 2009 World Bank-IZA Annual Research Conference "Employment and Development", Bonn.
- Policy Day on "Financial Crisis and Employment", BMZ-GTZ-WB – IZA, Bonn.
- Population Aging, Public Expenditures and Financial/Economic Crises: (Re-)establishing priorities? Brussels Economic Forum 2009 - Beyond the crisis: a changing economic landscape, Brussels.
- Pension Systems and Financial Crisis: An Overview. Regional (ECA) Workshop Pension Systems in Times of Financial Crisis, Brussels.
- OECD Development Center Expert Meeting on Migration and Development in Latin America, Paris.
- OECD INFE Meetings on Financial Literacy and Education, Paris.
- Jan 2009 Youth Employment Conference - IYF, Jordan.
- Oct. 2008 Adequacy of Retirement Income After Pension Reforms in Central, Eastern, and Southern Europe, Reinventing Retirement – Reshaping Health and Financial Security for the EU 27 and Eastern Europe, High-Level Expert and Policy-Makers Conference, Duernstein (Austria)
- Aug. 2008: Rethinking Social Protection in an Ageing Society, 4TH WORLD AGEING & GENERATIONS CONGRESS, St. Gallen, Switzerland.
- Adequacy of Retirement Income After Pension Reforms in Central, Eastern, and Southern Europe: A Summary of Nine Country Studies, 4TH WORLD AGEING & GENERATIONS CONGRESS, St. Gallen, Switzerland.

- May 2008      Employment and Development, World Bank – IZA Conference, Rabat, Morocco.  
 Employment and Development:Toward an Operational Labor Market Paradigm for Low-income Countries, GTZ, Eschborn, Germany
- March 2008:    MILES to go: A quest for an operational labor market paradigm for developing countries, Institute for Advanced Studies
- Feb. 2008      The Role of National Reserve Funds in Social Security Reform, 2008 Global Pension Summit Suzhou, China  
 Non-financial (Notional) Defined Contribution Schemes, Chinese Academy of Social Sciences, Institute of Population and Labor Economics, Beijing, China.  
 Employment and Development:Toward a Labor Market Paradigm for Low-income Countries, China Center for Economic Research, Peking University, Beijing, China.  
 Closing the Coverage Gap, Joint World Bank-Hitotsubashi University-Ministry of Finance Conference, Tokyo, Japan.
- Jan. 2008      Employment and Development:Toward a Labor Market Paradigm for Low-income Countries, German Institute for Economic Research (DIW), Berlin.
- Dec. 2007      Social Security Reform Abroad: What Lessons for the US?    AARP and Urban Institute, Washington, DC
- Oct. 2007:     The Opportunities and Challenges of Funded Pensions Systems, Opening Speech, Financial Times - Global Pensions Investment Summit, London  
 Employment and Development: MILES to go, Ministry for Development Cooperation, The Hague  
 Making Pension Reform Work:The Link to Labor and Financial Market Reforms, Ministry of Finance, The Hague.  
 Demography and the Reform of Financial Markets, Maastricht University.  
 L’emploi des seniors : à quel prix ? CDC - Forum Retraite, Bordeaux, France.
- Sep. 2007:     Demographic Trends and the Challenges of Old Age Security, Commission on Growth and Development, Workshop on Global Trends and Challenges, Yale Center for Globalization  
 ISSA Social Security Forum: Social Security Summit Panel, Moscow.
- August 2007:   Altern und Finanzmarktentwicklung in Osteuropa, Demographischer Wandel: Konsequenzen und Implikationen für Finanzmärkte und –intermediäre Bankenseminar - Alpbach
- June 2007:     Expert Workshop on Aging Populations and Financial Markets: Global Challenges and Regional Perspectives for Central, Eastern and Southern Europe, ERSTE Foundation, Prague.  
 Making Pension Reform Work: The Link to Labor and Financial Market Reforms, International Forum on Pension Reform – Center for Financial Excellence, Bled, Slovenia.  
 Multi-pillar Pension Reforms: Experience, Lessons, and Challenges, Technische Universitaet Wien, Seminarserie “Oekonomie der Pensionsfonds”.
- May 2007:      G8 Meeting of Ministers of Labor, Social Protection and Globalization, Dresden.

- Social Protection for International Migrants, Migration and Development Conference, World Bank, Washington, DC
- April 2007: The World Bank & Core Labor Standards, Human Rights, and Democracy, IMF and World Bank Spring meeting - Civil Society Forum, Washington DC.
- March 2002: Policy Implications for Social Security in the Evolving Labour Market, Panel Discussion, ISSA Research Conference, Warsaw, Poland,
- Feb. 2007: La Réforme des Retraites : Tendances mondiales et implications sur les systèmes de retraite des fonctionnaires, RÉFORME DU RÉGIME DE RETRAITE DE LA FONCTION PUBLIQUE, Journée d'études, Rabat, Morocco.
- Global Update on Trends in Income Security in Old Age: A World Bank Perspective, Fifth Anniversary of the Adoption of the Madrid United Nations International Plan of Action on Ageing, UN, New York.
- Nov. 2006: Financial Education for Pensions and Insurance: Importance, Limits and Default Options, IMPROVING FINANCIAL LITERACY, International Conference hosted by the Russian G8 Presidency in Cooperation with the OECD, Moscow.
- Can Europe Soften the Human and Financial Costs of Retirement? Friends of Europe, Brussels.
- Oct. 2006: Addressing Risks in a DC Multi-pillar World, Chatham House Meeting on "Redistributing the Risk: Public and Private Approaches for Retirement Provision", London.
- Employment and Development: MILES to go, DFID, London.
- Toward A Reformed and Coordinated Pension System in Europe: Rationale and Potential Structure, Conference on The Prospective Hungarian Pension Reform in an International Perspective, Budapest.
- Sep. 2006: Building the Foundation for New Retirement Systems: A International Perspective, SOA-2020-Society conference, Washington, DC.
- June 2006: Pension Reform in Europe: Need and options for a more coordinated reform approach, European Centre for Social Welfare Policy and Research, Vienna.
- Social Protection in Global Perspective, IDS - University of Sussex
- May 2006: Demographic Alternatives for Aging Industrial Countries: Increase in Total Fertility Rate, Labor Force Participation, or Immigration, 8th Global Conference of the International Federation on Ageing, Copenhagen, Denmark
- Pension Design & Pension Reform: Experience & Lessons From The Last Two Decades - A Birds View, Senior Official Meeting, Copenhagen, Denmark.
- Social Protection in Global Perspective, Social Protection in South Asia: Growth with Equity, Security and Opportunity, Colombo, Sri Lanka.
- March 2006: The Economic Impact of Ageing: From Good Projections to Good Policy Proposals, Conference on The Economic and Budgetary Impact of Ageing, Commission of the European Union and Economic Policy Committee, Brussels.



- From Averting the Old-Age Crisis” to “Keeping the Promises” and Beyond” – Panel Discussion, Lessons from Pension Reform in the Americas, Conference sponsored by the Federal Reserve Bank of Atlanta, Instituto Tecnológico Autónomo de México, and the Pension Research Council of The Wharton School of the University of Pennsylvania, Atlanta.
- Feb. 2006: The World Bank Approach to Social Protection, Conference on the Right to Social Security, Belgium Social Security Association, Brussels.
- Jan. 2006: Enlargement, migration, and policy co-ordination – Global and European Lessons, Factor Flows in Europe: The Impact of Enlargement, Conference sponsored by European Department and IMF Institute with the National Bank of Poland, Warsaw.
- Dec. 2005: Pension Systems around the Globe - The World Bank's Perspective, AARP Idea Exchange Series, Washington, D.C.
- Oct. 2005: Risk and Development, inaugural speech for the master course on development economics, University of Rome II – Tor Vergata.
- The Role, Limits of, and Alternatives to Financial Education in Support of Retirement Saving in the OECD, Eastern Europe and beyond, CeRP Conference on “Individual Behavior with respect to Retirement Saving”, Turin.
- Social Security in the 21st Century: Challenges and Policy Directions for a Dynamic Latin America, Policy Discussion Panel on Social Security, LACEA Annual Conference, Paris.
- August 2005: Demographic Alternatives for Aging Industrial Countries: Enhanced Immigration, Labor Force Participation, or Total Fertility Rate, G20 Seminar on Demographic Challenges and Migration, Sydney, Australia
- Labor Market, Job Creation, and Growth, A, Proposal by the World Bank for an operationally-oriented research program, Presentations to Treasury in Canberra, Sydney University, and academic institutions in Tokyo.
- An International Perspective on Pension Systems and Reforms, Conference on New Pension Systems in the 21st Century -Pension Reforms in Super-Aging Society and Low Economic Growth, Tokyo, Japan.
- June 2005: Old-Age Income Support for the 21<sup>st</sup> Century: The World Bank’s Perspective on Pension Systems and Reform, Regional Conference on Pension Reforms in the Middle East and North Africa, Rabat, Morocco
- May 2005: Soporte del Ingreso de Vejez en el Siglo Veintiuno: Una Perspectiva Internacional de los Sistemas y de las Reformas, “¿Cómo fortalecer los nuevos sistemas previsionales en América Latina? Seminario FIAP, Cartagena de Indias, Colombia
- April 2005: Old-Age Income Support for the 21<sup>st</sup> Century, Financial Sector Post-Crisis – Challenges and Opportunities, Brookings, DC., Washington, DC.
- April 2005: Presentation and consultation on the Bank’s proposal for a labor market strategy - Towards a Labor Market Approach to strengthen job creation and to contribute to poverty reduction and achieving the MDGs, Geneva, Brussels, Paris, London, Stockholm, and Berlin.

- March 2005: An international Perspective on pension systems and reforms, Government Pension Reform Seminar, Kiev, Ukraine.
- Nov. 2004: Poverty, Migration, and Employment in South East Europe: What can the data tell us? Austrian k National BConference on European Economic Integration 2004, Vienna, Austria.  
Old-Age Income Support in the 21st Century: The World Bank's Perspective on Pension Systems and Reform, Consultation presentation to International Labor Organization, Geneva, Switzerland.
- Oct. 2004: Perspectivas y Tendencias en las Reformas Internacionales de los Sistemas de Pensiones, Conferencia "La CONSAR a 10 años de su creación", 5 de octubre de 2004, México.  
The Recording of Social Insurance Pensions in the System of National Accounts: The changes ahead, Joint CESifo and LBI Conference on Debt Sustainability, Munich, Germany.
- Sept. 2004: Social Protection for the Rural Population: The Need to Think Outside the Box. General Assembly, International Social Security Association, Beijing, China.  
Demographic Change and Consumption, and the Role of Funded Pensions for Financial Market Development, European Forum Alpbach, Austria.
- May 2004: Social Risk Management: Implications for Growth and Child Labor, Workshop on Child Labor and Growth, University of Rome II (Tor Vergata), Italy.  
Labor Market Policy: The underestimated ingredient for poverty reduction and sustained development, IMF and World Bank Constituency Meeting, Sarajevo, Bosnia and Herzegovina.
- Feb. 2004: Risk, Vulnerability and Development, PADI Workshop on "Measuring, Understand, and Alleviating Household Vulnerability, Dar-es-Salaam, Tanzania.
- Jan. 2004: Labor Market Developments: An overview of trends and policy issues, 5th Annual Global Development Conference, New Delhi, India
- Nov. 2003: Severance Pay Programs Around The World: Rationale, Status, Reforms. Joint World Bank/International Institute for Applied System Analysis/Ludwig Boltzmann Institute for Economic Analysis Workshop on Severance Payments, IIASA/Laxenburg, November 7 and 8.  
The Contribution of Social Protection to the MDGs, International Labour Organization, Geneva.
- Oct. 2003: Toward a Reformed and Coordinated Pension System in Europe: Rationale and Potential Structure, Commission of the European Union, Brussels.
- Sept. 2003: Toward a Reformed and Coordinated Pension System in Europe: Rationale and Potential Structure, Watson and Wyatt/Deutsches Institut fuer Wirtschaftsforschung (WW-DIW) Lecture on Issues in Pension Reform, Berlin, and NDC Conference in Stockholm.
- April 2003: The concepts of Social Risk Management and vulnerability, and their importance in poverty reduction strategies, A Forum on Poverty and Vulnerability in South Asia, Sri Lanka.
- March 2003: Social Risk Management: Concept, Implications, Operationalization (Joint Research Seminar of the Economic Departments of Vienna); Financial Aspects of EU Enlargement (CEPII and WIIW conference on Economic Consequences of European Enlargement); The World Bank Approach to Pension Reform (Distinguished Address, Atlantic Economic Association annual meeting) – all Vienna

- Nov. 2002: Social Protection Analysis and Policy Formulation: What is Social Protection?; Social Protection Analysis and Policy Formulation: Monitoring the Adequacy of SP Interventions; La Gestion Social des Risques et la Vulnerabilite, HD PRSP Conference, Addis Ababa, Ethiopia.
- Oct. 2002: Population Aging and Old-Age Income: The need for re-design and life-long learning, 6th World Aging Conference, Perth, Australia; The World Bank's View on Pension Reform and Financial Markets, Curtin University, Perth, Australia; Population Aging, Retirement Income and Financial Markets, Perth Business Circle, Australia.  
The World Bank's Position on Pension Reform, NSW University, Sydney, Australia
- Sept. 2002: „Dette Implicite de Pension: Problematique, Mesures et Portee dans une Perspective International“, 10e Forum Retraite – Seminaire Scientifique, Bordeaux, France.
- May 2002: „The World Bank's Position on Pension Reform: Rationale, Issues and Open Questions, OECD Conference, Warsaw, Poland.  
„Social Risk Management and Child Labor“, University of Rome II, Italy.
- April 2002: „Risk and Vulnerability: The Forward Looking Approach of Social Protection“, University of Florence, Italy.  
„Old-Age Income Support for the 21st Century“, United Nations 2nd World Assembly on Ageing, Madrid, Spain.
- March 02: „Understanding the World Bank's Position on Pension Reform“, 27th International Congress of Actuaries, Cancun, Mexico.
- Feb. 2002: „Pensions in an Aging Society, Integrating Europe and Globalizing World“, Conference on European Pensions: A Public-Private Partnership, Munich, Germany.
- Nov. 2001: „Risk and Vulnerability: The Forward Looking Approach of Social Protection“, University of Cape Town, South Africa.
- Oct. 2001: „Funded Pillar in Pension Schemes: Potential Benefits and Challenges“, International Seminar on Issues of Implementation of Pension System Reforms in Russia, Moscow, Russian Federation.  
„Protecting the Vulnerable: A Forward Looking Approach“, Presentation to the 3rd Committee, United Nations, and „Risk and Vulnerability: Implementing a forward-looking approach for social protection“, Luncheon presentation to UN ambassadors and staff New York.
- Sept. 2001: „A Provocative Note on Coverage“, Individual Accounts as Social Insurance: A World Bank Perspective“, and „Aging and Social Security: Issues and Options“, World Congress of the International Social Security Association, Stockholm, Sweden.
- August 2001: „Implicit Pension Debt: Issues, Measurement and Scope“ and „Issues in Austrian Public Finance“, 57th Congress of the International Institute of Public Finance, Linz, Austria.
- July 2001: „Social Risk Management“, Netherlands Economic Institute, Rotterdam, Netherlands.
- June 2001: „Social Protection in the Accession Countries: Challenges, Progress and Implications for the EU“, EU Economic Policy Committee, Vienna, Austria.

- „Population Aging: A challenge for Europe and the World“, Fundacion Ramon Areces, Madrid, Spain.
- „Die Rolle der Pensionsfonds in Finanzmarktentwicklung und Wirtschaftswachstum“, Tag der Zukunft, Victoria Versicherung, Dusseldorf, Germany.
- March 2001: „Global Patterns in Pension Reform: Lessons for Mauritius“, Pension Reform Conference, Mauritius.
- Feb. 2001: „Risk and Vulnerability: The forward looking Role of Social Protection in a globalizing World“, Asian Development Bank Poverty Forum, Manila, Philippines.
- „Social Risk Management: The Social Protection Strategy Paper“ AusAid and Treasury, Canberra, Australia.
- Sept. 2000: „Die Herausforderungen kapitalgedeckter Renten liegen im Detail“, Ottobeuren Wirtschaftswissenschaftliches Seminar, Ottobeuren.
- Ergaenzende Kapitalgedeckte Vorsorge: Konzeptuelle und praktische Probleme, Bundesanstalt fuer Angestellte, Berlin.
- August 2001: Social Risk Management: A New Conceptual Framework for Social Protection, and Beyond“, 56th Congress of the International Institute of Public Finance, Sevilla, Spain.
- April 2000: „La gestion du risque social dans le monde : enjeux, options, réformes en cours“ und „La perspective de la Banque mondiale sur les réformes des pensions dans le monde“, Séminaire Sciences Po/Banque mondiale „ Réformer les politiques sociales à l’heure de la mondialisation“, Paris.
- „Developments in Pension Reform“, Middle East and Northern Africa Pension Reform Conference, Cyprus.
- Jan. 2000: Can Investments in Emerging Markets Help to Solve the Aging Problem, Center for Strategic and International Studies (CSIS) Conference on Graying of Populations, Washington, D.C.
- Can Investments in Emerging Markets Help to Solve the Aging Problem, Asset Management Forum for Pension and Endowment Funds on Emerging Markets: Translating Economic Development into Financial Returns, Dallas, Texas.
- Nov. 1999: Coverage in Multipillar Pension Systems, Asian Development Bank Institute Workshop on Pension Reform, Singapore.
- Social Risk Management, WBI Conference on Social Policy, New Dehli, India.
- Joint ILO, World Bank and Japanese Labor Institute Conference on Labor Market Implication of Financial Crisis, Tokyo, Japan.
- Oct. 1999: Pension Reform in East Asia: Challenges and Opportunities, Workshop on Pension Funds Investments, Hong Kong.
- Sept. 1999: Extending Coverage in Multi-Pillar Pension Systems: Constraints and Hypotheses, Preliminary Evidence and Future Research Agenda, World Bank Research Conference on „New Ideas for Old Age Security“, Washington, D.C.

- Sept. 1999: The World Bank Approach to Pension Reform, Conference on Pension Reform: International Experiences, Prague.
- Dec. 1998: Multipillar Pension Systems: A World Bank Perspective on Pension Reform, Joint ADB and PPI Workshop on „Policy Options for Pension Reform in Asia: Challenges in Design and Implementation“, Manila, Philippines.
- Nov. 1998: Conceptual considerations for a multipillar pension system for Bulgaria, East/West Workshop on Pension Reform in Bulgaria, Sofia.
- Nov. 1998: Conceptual Issues of Pension Reform, IIASA, Wien.
- August 1998: Generationenkonflikt oder Reform(un)faehigkeit: Globale Trends der Pensionsreformen, Europaeisches Forum Alpbach.
- May 1998: Global Trends in Pension Reform, Conference on Pension Reform and Economic Growth in the Czech Republic, East/West Institute, Prague.
- March 1998: Global Trends in Pension Reform, EU conference on pension reform, Laibach.
- Feb. 1998: Global Trends in Pension Reform, Harvard University.
- Nov. 1997: A World Bank Perspective on Pension Reform, ISSA Regional Conference, Manila, Philippinen.
- Nov. 1997: Pension Reform and Labor Market, International Pension Conference on 2<sup>nd</sup> Generation Reform Issues, Oaxaca, Mexico.
- July 1997: The World Banks View on Pension Reform, University of Harvard, Mass., EDI-HIID Workshop on Pension Reforms.
- June 1997: On Economic Benefits and Fiscal Requirements of moving from unfunded to funded pension provisions, ILO seminar, Genf.
- Feb. 1997: Pension Reform and National Saving: The Chilean Experience, Conference on “Fiscal Requirements of Pension Reform”, Cancun, Mexico.
- March 97: Starting all over in Pensions: The Challenges Facing Central and Eastern Europe, Harvard University, Cambridge, Mass.
- Dec. 1997: Pension Reform and Labor Market: On Theory and Evidence, Conference on “Economic Effects of Pension Reforms, Oaxaca, Mexico.
- Nov. 1997: Main Issues of Bank-guided Pension Reforms, ISSA Conference, Manila, Philippines.
- Oct. 1997: Main Issues of Bank-guided Pension Reforms, International Conferences of Pension Reforms, Ljubljana, Slovenia.
- July 1997: The World Banks View on Pension Reform, University of Harvard, Mass., EDI-HIID Workshop on Pension Reforms
- Feb. 1997: Pension Reform and National Saving: The Chilean Experience, Conference on “Fiscal Requirements of Pension Reform”, Cancun, Mexico.
- Oct. 1996: Market Opening in Eastern Europe: On the (A)symmetry of Trade Adjustment of OECD Countries, CEPAL seminar series, Santiago de Chile.

- Oct. 1996: Pension Reform in Central and Eastern Europe: Necessity, Approaches and Open Questions, CEPAL/PNUD Seminar „Situacion Actual de las Reformas a los Sistemas de Pensiones en America Latina y el Caribe“, Santiago de Chile.
- Sept. 1996: Pension Reform and National Saving: The Chilean Experience, Seminar on „Domestic Savings: The Key to Sustained Development in Latin America, IRELA, Lisbon.
- Sept. 1996: On Economic Usefulness and Fiscal Requirements of Moving from Unfunded to Funded Pension Provisions, American Institute for Contemporary German Studies, The John Hopkins University, Washington, D.C.
- July 1996: Pension Reform and Economic Growth: The Chilean Experience, Annual Conference of the Western Economic Association, San Francisco.
- June 1996: Pension Reform: From unfunded to funded provisions, Seminar on the future of the Social Security in the European Union, EU Commission, Brussels.
- Jan. 1996: Fiscal Issues of Moving from Unfunded to Funded Pensions, Fiscal Policy Seminar of the Economic Commission for Latin America, Santiago de Chile.
- Oct.. 1995: The Maastricht Fiscal Criteria: Required but Ineffective?, Workshop of the European Institute on „The Maastricht Treaty: Monetary Constitution without Fiscal Constitution“, Saarbrücken.
- May 1995: Financing the Transition, Institute for EastWest Studies Workshop on“Pension Reform in Latin America: What can we lear?, Virginia, USA.
- March 1995 (i) Maastricht fiscal and financial market sanctions: Are both ineffective; (ii) Pressures to adjust: The economic consequences for Western Europe from reeforms in eastern Europe; (iii) Pension reform, financial market developments and endogenous growth; Pontifica Universidad Catolica de Chile.
- Nov. 1994 Kapitalgedeckte und private Renten für Osteuropa?, Wolfsburger Gespräch: Soziale Sicherungssysteme und Wettbewerbsfähigkeit - Ost- und Südosteuropa als Investitionsstandort
- August 1994 Funded and Private Pensions for Eastern European Countries in Transition?, Conference on Pension System Features and Options for Reform, Rio de Janeiro, Brasilien.
- June 1994 Exogener Nachfrageschock und makroökonomische Anpassungsreaktion: Untersuchungen für das Saarland, Forum: Das Zusammenhang zwischen Löhnen und Beschäftigung im zusammenwachsenden Europa, Universität des Saarlandes - Industrie und Handeskammer Saarland
- Feb. 1994 Restructuring Eastern Europe: Need and Scope of Private Pensions, Münchner Wirtschaftswissenschaftliches Kolloquium.
- Nov. 1993 Die Herausforderung an Europa bis und nach dem Jahre 2000: Westintegration, Ostreform und junge Tiger, Volkswirtschaftliches Symposium des Europa-Instituts der Universität des Saarlandes, EUROPA im UMBRUCH, Saarbrücken.

- Nov. 1993 Monetary, fiscal and social institutions needed for restructuring, Conference on "Output Decline in Eastern Europe - Prospects for Recovery?: Unavoidable, external influence or home made?", IIASA, Laxenburg.
- Oct. 1993 Reforming Old-age Pension Systems in Central and Eastern European Economies in Transition, Seminar, University of Pittsburg.
- Oct. 1993 Eastern European Economic Reform and Western European Economic Adjustment: Some macroeconomic considerations, EMPIRICA Economic Policy Forum, Workshop des Österreichischen Instituts für Wirtschaftsforschung und des Ludwig Boltzmann Instituts für Analyse der Wirtschaftspolitik, Wien.
- March 1993 Maastricht und die Finanzwissenschaft, Universität Linz
- Nov. 1992 Les réformes des systèmes de retraite dans les pays de l'Europe Centrale et de L'Est: nécessité et chance, Journées "Assurance et Retraite", Liège Université d'Europe.
- Aug. 1992 Economic Aspects of Pension Reform in OECD Countries, 48th Congress of the IIPF "Impact of Demographic Change for Public Finance", Seoul, Korea.
- June 1992 What policy-mix may overcome the current output decline in Central and Eastern Europe, Austrian National Eastern Europe Policy Forum, mit G. Winckler.
- Mai 1992 Reforming Old-Age Pension Systems in Central and Eastern European Countries in Transition: Necessity and Chance, Sonderforschungsbereich der Universität Konstanz und IISV-Europäische Regionalkonferenz, Bonn.
- March 1992 Aspects of Fiscal Policy for Transition and Economic Growth, IHS-ISSA Conference on "Mass Migration in Europe, Vienna.
- Nov. 1991 Reforming Old-Age Security Systems in Eastern Europe - Necessity and Chance, Conference on Public Pension Systems, Institute for Advanced Studies, Vienna.
- Oct. 1991 Adapting to economic change: Reconciling social protection with market economies, Tripartite Symposium on the future of social security in industrialized countries, ILO, Geneva.
- Oct. 1991 Fiscal policy in economies in transition, OECD Conference on Medium-Term Economic Assessment, Wien.
- Sept. 1991 Zu den Reformen des öffentlichen Sektors in ehemaligen Planwirtschaften: Notwendigkeiten, Beschränkungen und bisherige Erfahrungen, Wirtschaftswissenschaftliches Seminar Ottobeuren, Ottobeuren, Deutschland.
- July 1991 Steuerreform für Osteuropa, Osteuropa-Seminar - IHS/WIIW, Wien.
- April 1991 The Provision of Complementary Pensions: Objectives, Forms and Constraints - Background and Policy Considerations for the Discussion in the CSFR, Joint ISSA - Federal Ministry of Labor Conference on Complementary Pension Insurance Schemes, Prag, CSFR.
- Feb. 1991 "Economic Aspects of Public Pension Reforms in OECD Countries," und "Reforming Public Pensions in OECD Countries", Hitotsubashi Universität, Tokyo und Universität von Osaka.

- Dec. 1990 Zur Konvertibilität der Währungen ehemaliger Planwirtschaften, Universität Konstanz.
- Dec. 1990 Economic Reform Plan of the CSFR, IIASA Seminar, Lnare, CSFR.
- Nov. 1990 Unemployment Benefits during Economic Transition, OECD Conference on "The Transition to a Market Economy in Central and Eastern Europe", OECD, Paris, .
- Nov. 1990 Zur Konvertibilität der Währungen ehemaliger Planwirtschaften, Universität Saarbrücken, Vorlesungsreihe "Währungsharmonisation in Europa".
- Sept. 1990 Budgetäre Fragestellungen des Subventionsabbaus beim Übergang vom Plan zum Markt, Jahrestagung 1990 der Oesterreichischen Nationalökonomischen Gesellschaft, St. Magdalena.
- Sept. 1989 Internationaler Vergleich von Alterssicherungssystemen: Konzepte, Strukturen und ökonomische Effekte, Wirtschaftswissenschaftliches Seminar Ottobeuren, Ottobeuren, Deutschland.
- Aug. 1989 Langfristige demographische Entwicklung und die Zukunft der Altersvorsorge, Europäisches Forum Alpach, Alpach, Tirol.
- Oct. 1988 L'incidence du vieillissement démographique sur les dépenses sociales, Colloque Européen sur le vieillissement en Europe - tendances, enjeux et stratégies, Paris.
- April 1988 Pension Policies in the OECD Countries: Background and Trends, VIth World Conference of the International Society on Family Law, Tokyo.
- Oct. 1987 On the relationship between old-age income and labour market policy, Colloquium of the European Institute of Social Security on "Structural Problems of Social Security - Today and Tomorrow", Krems.
- Sept. 1987 Ökonomische Aspekte und Effekte der österreichischen Sozialversicherung; Pensionsversicherung und ökonomische Effekte; und Demographische Entwicklung und Sozialausgaben (gem. mit P.Findl und R.Münz), Symposium "100 Jahre Sozialversicherung in Österreich", Wien.
- Sept. 1987 Problemi e prospettive dei sistemi previdenziali dell'Occidente industriale, Vortrag anlässlich der Tagung "previdenza e assicurazione: Pubblico e privato a confronto", Unione italiana camera di commercio und Centro Studi e Documentazione internazionali, Lago Maggiore, Italien.
- August 1987 Altersvorsorge im Lebenszyklus, Alpach 87, Koreferat.
- April 1987 Tendenzen der Altersvorsorge in den Ländern der OECD, Vortrag vor der österreichischen Gesellschaft für Versicherungsfachwissen, Wien.
- April 1987 Ageing and Social Security Costs, CEPS Conference on Demographic Change in Europe and its Socio-Economic Consequences, Corsendonk Priory, Limburg, Belgium.
- Dec. 1986 Redistribution of responsibilities for old-age income support - What are the issues? OECD experts meeting on the interaction of public, occupational and personal provisions, Paris.
- Oct. 1986 Systèmes de pensions publiques et vieillissement de la population - quelles sont les conséquences pour les pays de L'OCDE, Université Catholique de Louvain (gem. mit M.Maguire)



- May 1986 Pension Policy in OECD-Countries, Seminar der U.S. Social Security Administration, Washington, D.C.
- April 1986 The borderline between public and private pension schemes, Jahrestagung der Montedison's Research Foundation, Rome.
- Jan. 1986 Steuerstruktur und Beschäftigung , Universität Frankfurt / Universität Linz.
- Jan. 1986 Marktunvollkommenheiten und Umverteilung: Staatliche Verteilungspolitik in neuer Perspektive, wirtschafts- und sozialpolitisches Kolloquium, Sonderforschungsbereich 3, Universität Frankfurt und Mannheim.
- Jan. 1986 Analyse comparé des modes de financement des autoroutes dans les pays de la C.E.E. Colloque International: Comment financer les équipements publics de demain?, Paris (gem. mit A.Van der Bellen)
- Nov. 1985 Main issues in the development of public pension schemes: International and historical perspectives. Joint Japanese/OECD Conference of high-level experts on Health and Pension Policies, Tokyo.
- Jan. 1985 Effizienzaspekte öffentlicher Transfersysteme, Universität Konstanz.
- Feb. 1984 Sanierung der österreichischen Pensionsversicherung XVIII.Hochschulkurs aus Finanzwissenschaft, Universität Innsbruck.
- Jan. 1984 Zur Effizienzmessung staatlicher Aktivitäten, Universität Kiel.
- Nov. 1983 EDV-unterstützte Prüfungsverfahren - Multiple Choice: Motivation und Zielsetzung, Implementation und praktische Erfahrung, 3.Symposium "Der Computer als Instrument der Sozial- und Wirtschaftswissenschaften", Universität Graz (gem. mit W.Philipp)
- Aug. 1983 Public finance, social policy, savings and real capital formation, IIPF Kongreß "Public Finance and Social Security", Budapest
- March 1983 Budgetary and related policies in Austria. An approach to cyclical policy and structural change by institutional arrangements and governmentally supported competitiveness, Colloque Européen de L'Association Francaise de Science Economique, Breau-sans-Nappe/Paris
- Sept. 1981 Makroökonomische Aspekte der sozialen Sicherheit, 3.Jahrestagung der Nationalökonomischen Gesellschaft, Wien
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