

## Overview of Callund Consulting Project Work in Recent Years

Country	Project Name	Date
Caribbean	CARICOM – Assessment of Social Security Organisations and Possible Harmonisation of Qualifying Conditions for Improved Policy Environment to Facilitate Free Movement within 17 CARICOM Member States	08/2010 – ongoing
Abu Dhabi	Consultant to the Abu Dhabi Retirement Pensions and Benefits Fund on its proposed reorganisation.	04/2010 – ongoing
Serbia	Advice to the National Bank of Serbia (NBS) on the supervision and regulation of VPFS (Voluntary Pension Funds) (World Bank)	2/2010 – ongoing
China	Development and implementation of old-age pension policy, with particular attention to rural pensions and farmers who lost their land. (EU)	11/2008 – ongoing
St Helena	Review existing practices and sustainable efficient and socially-responsible pension system for St Helena (DFID), supported by actuarial / financial projections.	10/2006 – 8/2007
Georgia	Assistance to the Georgian Pension Task Force for the creation of a new pension system in Georgia following the collapse of the State pension system and the absence of any private sector pension provisions. Consultant services include policy advice, review of the current legislation and the provision of a financial projection model. (EU)	4/2006 – 8/2009
Macedonia	Review of policy concerning disability pensions and privileged pensions for those who work in arduous conditions. (World Bank/SPIIL)	2006
Russia	Presentation to a World Bank seminar on pension reform – with particular reference to changes in the regulation and supervision of pension funds in the UK. (World Bank)	2005
Russia	Preparation of a paper for a Moscow-based research institute on the systems of regulation which are applied to companies and financial institutions in the UK	2005
Uganda	Advisor to Ugandan Capital Markets Authority on the consolidated supervision of NBFIs (Non-banking financial institutions) and prospective pension regulation (FIRST Initiative)	2005
Russia	Advisor to the National Association of Pension Funds on building its function and capacity, as an SRO (Self-Regulatory Organisation) to support the Federal Regulator in connection with the regulation of non-state pension funds. (FIRST Initiative)	2005
China	Presentation to the ISSA General Assembly on Protecting Individual Rights in Privately-Managed Retirement Schemes – a Global Study (ISSA)	2004
Uganda	Assistance to the Ministry of Finance, Planning & Economic Development on the restructuring of public sector pensions and the National Social Security Fund. (DFID)	2004

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Sri Lanka	Assistance to Pension Reform Office of the Ministry of Finance on the prospective regulatory structure for state and non-state retirement benefit schemes. (FIRST Initiative)	2004
Kyrgyz Republic	Assistance to the Government Commissions (GTAC/GSAC) on the introduction of a funded pension component. (World Bank)	2004 – 2005
Russia	Consultant to an international corporation in relation to its pension-investment management strategy.	2004
Russia	Consultant to a multinational financial institution in the constitution and development of a non-state pension fund.	2004
Bosnia & Herzegovina	Actuarial Analysis & Training. Development of a pension system simulation model for both Entities (Federation of BiH and Republika Srpska) – (World Bank)	10/2004 – 3/2005
Bosnia & Herzegovina	Vertical Functional Review of the Pension Funds in both Entities (Federation of BiH and Republika Srpska) (World Bank)	3/2004 – 12/2004
Sri Lanka	Strengthening the Regulatory Framework for Private Pension Funds	3/2004 – 11/2004
Indonesia	A Proposed National Social Security Scheme (SJNS) for Indonesia	9/2003 – 3/2004
Macedonia	Social Protection & Health Sector Development Project, Health Insurance Governance Reform	9/2004
Moldova	Social Protection Management Project. Teaching of a crash course in the development and operation of pension system simulation models.	7/2002 – 10/2002
Russian Federation	Assistance to the Russian Foundation for Social Reforms (Russian Ministry of Economic Development and Trade)	10/2002 – 12/2002
Russian Federation	Assistance to the Ministry of Economic Development and Trade (MEDT)	3/2002 – 12/2002
Slovenia	Health Sector Management Project – Adapting and Improving Reimbursement System in Health Sector	9/2001 – 7/2004
Global	International Study – Protecting Individual Rights in Privately Managed Retirement Schemes for ISSA (International Social Security Association)	2001 – 2003
Brazil	Strategic Planning for INSS	11/2000 – 7/2001
Russian Federation	Pension Fund of Russia: Policy Assistance - Phase 2 including the design and presentation of a bespoke financial projection model.	8/2000 – 3/2003
Russian Federation	Assistance to the Social Insurance Fund (SIF) of the Russian Federation – Industrial Injury Insurance	7/2000 – 2/2001
Estonia	Assistance to Ministry of Finance to assess the financial and economic implications of introducing a mandatory funded second pillar to the Estonian pension system, developing a bespoke computer projection model and training staff in its use.	3/2000 – 8/2000
Russian Federation	Pension Fund of Russia: Policy Assistance – Phase 1 (DFID)	4/1999 – 5/2000

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Czech Republic	Employers' Sponsored Occupational Pensions: Feasibility and perspective in the Czech Republic Project No: CZ-9710-0053	6/1999-11/1999
Saudi Arabia	Saudi British Bank: Actuarial Valuation	10/1999
Oman	Ministry of Palace Office Pension Fund – Valuation Report	8/1999
Saudi Arabia	GCC – The Cooperation Council for the Arab States of the Gulf: Actuarial Valuation of Staff Pension Benefits	1/1999
Oman	Internal Security Service of Oman – Pension Fund Valuation	1999
Oman	Central Bank of Oman: Valuation	1999
Oman	Oman Refinery Pension Scheme: Actuarial Valuation and Report	1/1999
Hungary	Technical Assistance to the Private Pensions Guarantee Fund	12/1998 – 11/1999
Albania	Development of Social Security Statistics	9/1998 – 9/1999
Oman	Bank Muscat – Supplementary pensions for Omani Employees: Actuarial valuation and report	8/1998
Poland	Market entry analysis for a private pension fund	3/1998 – 5/1998
Albania	Support to the development of an actuarial model for long-term forecasting in social insurance	3/1998 – 4/1998
Poland	Technical Assistance to Office of Plenipotentiary	1/1998 – 11/1998
Oman	Sultan's Special Force Pension Fund: Actuarial Valuation and Report	1998
Oman	Royal Guard of Oman Pension Scheme: Actuarial Valuation and Report	1998
Estonia	Estonian National Insurance Board: Introduction of simulation methods in social security analysis	6/1997 – 5/1998
Oman	Royal Oman Police Pension Trust: Actuarial Valuation and Report	11/1997
Saudi Arabia	Riyad Bank: Staff Pension Fund actuarial valuation and projections	11/1997
Oman	Civil Service Employees Pension Fund: Valuation	10/1997
Saudi Arabia	Actuarial valuation and financial projection of the Arab National Bank Staff Terminal Benefits Scheme	6/1997
Bulgaria	Technical Assistance Regarding Support to the Introduction of Complementary Occupational Pension Schemes (Teachers' Pension Fund)(ZZ-9505-01-42-001)	2/1997
Albania	Development of software applications for short-term forecasts for Social Insurance Institute revenue and expenditure.	10/1996 – 11/1996
Uganda	Actuaries and Consultants to the Bank of Uganda Employees' Retirement Benefit Scheme for the past 17 years	1993 – date
Russian Federation	Technical Assistance to the Inspectorate of Non-State Pension Funds (DFID)	4/1992 – 4/2000