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Article in the Neue Zürcher Zeitung (NZZ)

The Article titled **“Dismay amongst Swiss Pensioners in New Zealand”** outlines the upcoming introduction of the Automatic Exchange of Information (AEOI) and our resentment and frustration concerning the ongoing issue with the Swiss Old age Pension and New Zealand Superannuation. Apparently our outcry and letters to the Swiss Government and the Political Parties have somehow caught the attention of the NZZ. The Article was published on the 7th of May 2017 in the Sunday Edition of the Newspaper. It is estimated to reach over 400'000 readers. The NZZ was founded in 1780. It is seen as having been a precursor in objectivity and in-depth treatment of serious news, combined with editorials, and coverage of cultural news. Its high standards were emulated worldwide by other prestige newspapers that followed.

Peter Ehrler  
Elected Council Member of the Swiss  
Abroad representing New Zealand.

*Article in German which has been printed with the courtesy and approval of the Neue Zürcher Zeitung.*

## Unmut unter Schweizer Rentnern in Neuseeland

NZZ am Sonntag vom 7. Mai 2017 von  
Kathrin Alder

Die Schweiz will den automatischen Informationsaustausch in Steuersachen auch mit Neuseeland einführen. Zum Unmut vieler Schweizer Rentner im Land.

Ab 2019, so haben es die Schweiz und Neuseeland vereinbart, soll zwischen den beiden Ländern der automatische Informationsaustausch in Steuersachen gelten, kurz AIA. Dies bedeutet volle Steuertransparenz.

Die Gemüter hierzulande bewegt dies kaum, doch am anderen Ende der Welt herrscht darob grosse Aufregung. Hintergrund ist ein Problem, das insbesondere die Schweizer Rentner in Neuseeland schon seit Jahren beklagen. Sie werden immer zahlreicher und viele von ihnen haben eine Zeit lang in der Schweiz gearbeitet, bevor sie nach Neuseeland ausgewandert sind. Damit haben sie eine AHV-Rente zugute. Denselben Anspruch haben sie auch in Neuseeland. Dort erhalten alle eine jährliche «Superannuation», eine Rente von umgerechnet rund 800 Franken. Unter einer Bedingung allerdings: Sie müssen mindestens 10 Jahre im Land gelebt haben. Ein «doppeltes» Renteneinkommen

indes akzeptiert Neuseeland nicht und zieht die AHV-Rente von seiner jährlichen «Superannuation» ab. Neuseeland habe im Jahr 2015 etwa 250 Millionen Franken gespart, indem es ausländische Renten von der eigenen abgesetzt habe, sagt Peter Ehrler, Mitglied der Swiss Society of New Zealand und neuseeländischer Vertreter der Auslandschweizer.

Er bemüht sich deshalb darum, dass die Schweiz die AIA-Verhandlungen mit Neuseeland zum Anlass nimmt, das Renten-Problem zu lösen. In Briefen an Bundesrat und Parteien fordert er dazu auf, das AIA-Abkommen nicht zu unterzeichnen, bis die Sache mit der Rente gelöst sei. Zumindest einige der rund 700 AHV-Bezüger in Neuseeland dürften den AIA aber auch deshalb fürchten, weil sie sich die AHV auf ein Konto in der Schweiz ausbezahlen lassen und die neuseeländischen Behörden davon nichts wissen. Genaue Zahlen gibt es keine; Ehrler hält dies für Einzelfälle. Ganz aus der Luft gegriffen scheint die Angelegenheit indes nicht. Jörg Gasser, Staatssekretär für internationale Finanzfragen, hat bei seinem Neuseeland Besuch im Dezember dem Vernehmen nach eine Amnestie gefordert. Er habe dabei aber auf Granit gebissen, heisst es.

## Banking News Update

### Obligation for system-relevant banks to accept Swiss Abroad

As published in the June/July issue of the *Helvetia* I wrote that on the 4th of May 2017, the National Council, by a majority of three votes, rejected the motion by Roland Rino Büchel (SVP/SG), who demanded that all Swiss Abroad be able to open an account with a system-relevant bank. The rejection of this motion triggered a wave of indignation among the Swiss Abroad.

State Councillor and Vice-President of the Organisation of the Swiss Abroad (OSA), Filippo Lombardi (CVP/TI) has on 16th June lodged a new motion in relation to system-relevant banks, which was signed by 35 members of the Council of States. He calls on the Council of States to ensure that all Swiss nationals can open an account in such a bank. This in return for the implicit state guarantee to save them if necessary.

The motion by State Councillor, Filippo Lombardi, is based on the repeated

demands by the Council of the Swiss Abroad (CSA) – the ‘Parliament of the Swiss Abroad’ and legislative body of the OSA – to enable the 775,000 Swiss Abroad to establish a bank account in Switzerland or maintaining banking relationships on reasonable terms.

The number of Swiss nationals living abroad is growing steadily (by about 2% annually) and everyone is aware of the importance of the role of our countrymen abroad, especially at the economic level. The migration pattern has also changed considerably. Our countrymen are increasingly moving abroad for professional reasons on a short-term basis. It is they, above all, that need a bank account in Switzerland, to facilitate and maintaining of health insurance, social security contributions, payment of living costs in Switzerland or to conduct financial transactions related to real estate ownership. It is necessary to remove the obstacles faced by Swiss Abroad.

*In the message by the National Council on the amendment to the Banking Act of 20 April 2011, it is stated unequivocally that system-relevant (too big to fail) companies will have an implicit guarantee by the state if they get into financial trouble.*

*In return, all Swiss, wherever they reside, must be able to maintain an account in Switzerland at reasonable conditions.*

The Organisation of the Swiss Abroad (OSA) welcomes this 2nd motion. For the last nine years, the banking issue has been the focus of the discussions of the CSA. Neither the repeated requests to the relevant departments of the Confederation, nor the contact with the Swiss banks, the Swiss Bankers' Association or the Swiss banking ombudsman has resulted in finding an amicable solution. The solution to the problem therefore requires a legislative change.

Peter Ehrler  
Elected Member of the Swiss Abroad  
Representing New Zealand

## Summary Of Proceedings At The Council Of The Swiss Abroad In Bern, 25. March, 2017

Roughly 55% of the 140 delegates were present at the meeting.

### Swiss Bank Accounts:

Main topics were certainly discussions around bank accounts for the Swiss Abroad and this was emphasised by a motion brought forward by the Delegate from Hungary. In this motion, the delegate suggests that the OSA should sue Swiss Post Finance for discrimination as the Swiss Abroad continue to have difficulties in some areas as to obtaining banking facilities. The motion was only withdrawn against the promise of the Committee to undertake all efforts and to accelerate the process to get to a satisfactory banking arrangement for the Swiss Abroad. In the debate, it was often overlooked that while many Swiss banks offer banking facilities for the Swiss Abroad, in some areas difficulties still exist with getting mortgage finance and credit facilities. Beat Knoblauch pointed out at the meeting that in the case of the Swiss residing in Australia (the same applies for New Zealand) and obtaining credit facilities in Switzerland from a Swiss bank, this automatically classifies the Swiss bank as falling under the Australian or New Zealand reporting and credit laws. It has to be understood that the reporting systems by the Swiss banks to other countries is onerous.

### English Language:

As you know, proceedings of the Council of the Swiss Abroad are either in German or French. On rare occasions only, English speakers can address the meeting in English as long as it can be translated by someone ad hoc. However, all correspondence issued by the OSA is mostly in German and French, rarely in English.

The Delegate from Canada suggested including English as a third language. In the proceedings, that was defeated by 2 to 1. Adding a third language at present would add tremendous cost. It has to be remembered that 60% of the Swiss Abroad live in the EU countries, most of them in France and Germany.

### OSA Elections 2017:

The four (4) year term of all OSA Delegates is ending this August 2017 and in the course of the months of May, June and July 2017, elections are being held in all countries to elect their delegates. In a

pilot project with E-voting, a trial is being held in Mexico and Australia. In the case of Australia, some 16,000 Swiss Abroad registered with an email address with the Swiss Consulate in Sydney, will be able to elect four (4) Delegates in June 2017 and the Electoral Roll with eight (8) candidates was closed at the end of March 2017.

The OSA notes that currently 15 seats are vacant and hopefully these can be filled in the course of 2017.

### Travel Expenditure of OSA Delegates:

Various proposals have been submitted by the Committee of the OSA for a fair allocation of travelling expenditure to the Delegates attending Council Meetings. However, due to lack of funds none of the proposals could be finalised and the matter is deferred indefinitely or until funding has been secured.

### OSA Budget:

The Financial Statement of the OSA for 2016 was approved as well as the Budget for 2017. It was noted however, that a small loss has been budgeted for 2017. The OSA has definitely funding problems and this has to be addressed to and additional funding has to be sought. The yearly contribution from the Federal Government has remained constant for the last few years and the OSA stated that new programs and activities have to be curtailed for lack of funds.

### The next meeting

of the Council of the Swiss Abroad and the Congress of the Swiss Abroad will be held in Basel from 17th – 20th August, 2017.

The above has been printed with the courtesy and approval of Beat Knoblauch, Australian ASO Delegate.

*Peter Ehrler  
Elected Member of the Swiss Abroad  
Representing New Zealand*

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