

# The ESG Integration Forum – Europe

## Thursday, November 18, 2021

### Live and virtual

#### What makes our format unique?

Our forums consist of a series of fast-paced, **high-level briefings** followed by an interactive speaker Q&A, virtual roundtable sessions, and networking. This format provides the **perfect balance between learning** from various stakeholders in the ESG ecosystem and **making new connections**.

#### Agenda at a glance

All times in CET (Central European Time)

[Sign up](#)

Time	Thursday, November 18, 2021
9.30 am	<i>Welcome to the ESG Integration Forum 2021!</i>
9.45 am	<b>[Keynote interview] The view from the top: A CFO perspective on ESG with Stephanie Bruce from abrdn</b>
10.15 am	<b>Track 1: [Presentation] A buyside perspective on the Corporate Sustainability Reporting Directive (CSRD) and what investors really want</b> <b>Track 2: [Interview] Ensuring the board reflects modern ESG requirements</b>
10.45 am	<i>Meet the attendees: Networking</i>
11.00 am	<b>The challenge of quantifying social impact</b>
12.00 noon	<b>How to find 'best-fit' ESG investors</b>
12.30 pm	<b>Co-operation or conflict: The changing dialogue between issuers and investors</b>
1.15 pm	<i>Meet the attendees: Networking</i>
1.30 pm	<b>Targets, COP26 and TCFD: Climate trends and implications for companies</b>
2.15 pm	<i>Meet the attendees: Networking</i>
2.30 pm	<b>Track 1: Strengthening board oversight on ESG</b> <b>Track 2: [Interview] The evolution of ESG integration</b>
3.00 pm	<b>Best practices when telling your ESG story</b>
3.45 pm	<b>[Closing keynote] The future of reporting</b>
4.30 pm	<i>Summary of discussions and end of conference</i>

[Detailed agenda below](#)

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#### Agenda in detail

All times in CET (Central European Time)

**Time**      **Thursday November 18, 2021**

**9.30 am**      **Welcome to the ESG Integration Forum – 2021!**

*Laurie Havelock, editor-at-large, IR Magazine*

**9.45 am**      **[Keynote interview] The view from the top: A CFO perspective on ESG with Stephanie Bruce from abrdn**

ESG continues to be an increasing area of focus for CFOs, and in this session, we seek to understand how CFOs are thinking about ESG, what trends to look out for in 2022, the role of the CFO when responding to investor expectations and to can maximize the benefits of ESG investing.

- Understand how emerging policies will change investor expectations, and company requirements related to ESG disclosures
- Hear advice about how to prepare yourself for the changes to your reporting
- Learn about the systems and processes that need to be put in place to ensure you adhere to data quality standards

*Moderator: Laurie Havelock, editor-at-large, IR Magazine*

*Stephanie Bruce, chief financial officer, abrdn*

**10.15 am**      **[Presentation] A buyside perspective on the Corporate Sustainability Reporting Directive (CSRD) and what investors really want**

The sustainable investor prefers a specific investment profile, and despite the fact that ESG-ratings among leading third-party vendors appear to be loosely correlated, they all have one thing in common; a similar risk premium exposure. This, in turn, can be translated to accounting numbers to bridge the gap between the rather qualitative debate around sustainability and quantitative corporate valuation frameworks. In his presentation, Jan Rabe, co-head Sustainable Investment Office at Metzler Asset Management will explain:

- Discover what sustainable investors really want from companies
- Learn how the rotation of sustainably invested capital affects a company's cost of capital
- Discuss why potential amendments to the upcoming Corporate Sustainability Reporting Directive (CSRD) should be on the agenda of every investor relations team.

*Moderator: Laurie Havelock, editor-at-large, IR Magazine*

**[Interview] Ensuring the board reflects modern ESG requirements**

The need for boards to have increased skills and expertise related to ESG is growing and there is more demand for diverse boards to provide diversity of thought and better representation at the top level of company oversight.

In this interview with Nasdaq's global head of board engagement, Byron Loflin we explore the approaches that companies can take in their board recruitment, composition, management and education to ensure that they are set up to provide effective governance over ESG risks to their companies.

- Understand how ESG is affecting skill requirements for board directors
- Learn about what you can do to increase diversity at the board level
- Hear about different approaches to preparing boards to provide oversight on ESG related topics

*Moderator: Steven Wade, head of event content, Corporate Secretary and IR Magazine*  
*Byron Loflin, global head of board engagement, Nasdaq*

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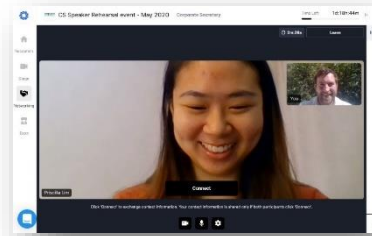
### Live and virtual

Jan Rabe, co-head of the sustainable investment office, Metzler Asset Management

#### 10.45 am **Meet the attendees: Networking**

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#### 11.00 am **The challenge of quantifying social impact**

This session will look into the challenges associated with how an organization can understand its social responsibility and begin to quantify its social impacts. This is an area that is receiving increasing interest from stakeholders which has only accelerated following the Covid-19 pandemic.

- Learn about the shift from CSR to ESG: the difference in the 'S'
- Hear about the findings from research into the growing importance of social issues and the impact on valuation
- Understand the importance of engaging stakeholders & understanding social priorities
- Overcome the challenge in setting meaningful social KPIs

Moderator: [Tim Human, senior reporter, IR Magazine](#)

[Anouk Heilen, global sustainability director for social impact, Unilever](#)

[Ben Morton, director and co-founder, SIFA Strategy](#)

[Sandhya Sabapathy, head of community and social impact for the UK and Ireland, The Adecco Group](#)

#### 12.00 noon **How to find 'best-fit' ESG investors**

Increasingly, fund managers across the world are taking a company's ESG performance and commitments into account when making investment decisions. As a result, we are expecting to see funds repurpose capital in-line with their (often newly developed) ESG criteria, upsetting long-standing status quos within shareholder bases. This session explores how companies can find best-fit investment in a world where many funds are now incorporating ESG criteria, but in different ways, to different extents.

- Understand how the new ESG regulatory environment will be driving change within investor bases
- See what criteria investors are now using to make investment decisions
- Learn how to evaluate which investors are most at risk of divesting, now and in the future
- Discover how to use qualitative and quantitative analysis to identify and target best-fit ESG funds

Moderator: [Laurie Havelock, editor-at-large, IR Magazine](#)

[Mariela Vargova, senior ESG analyst, Invesco](#)

[Audra Walton, head of ESG solutions, CMi2i](#)

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#### 12.30 pm **Co-operation or conflict: The changing dialogue between issuers and investors**

As evidenced by the latest AGM season, investors are stepping up their efforts on activism around ESG issues. There has been a far more diverse set of shareholder proposals tackling ESG challenges and those proposals are seeing a higher proportion of support.

This session explores how the nature of engagements between companies and investors could be changing, and seeks to share advice on how to engage with shareholders, and focus on co-operation before conflict.

- As we move from a disclosure era to a performance era, discover what actions investors seek from their portfolio companies
- Understand how shifts in investor actions will impact your governance practices
- Learn more about how to approach investor engagement – explore how to engage with portfolio managers, analysts and stewardship teams at asset managers
- Discuss how best to navigate and prepare for ESG investor activism

Moderator: [Laurie Havelock](#), editor-at-large, *IR Magazine*

[Maria Cuevas](#), investor relations ESG director, *Novartis*

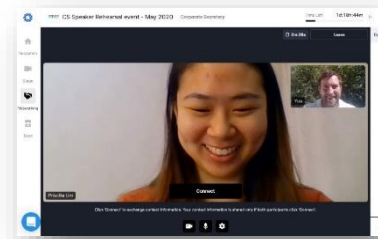
[Sophie L'Helias](#), president, board member and lead independent director, *Herbalife and Kering*

[Daniele Vitale](#), head of governance for the UK and Europe, *Georgeson*

#### 1.15 pm **Meet the attendees: Networking**

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#### 1.30 pm **Targets, COP26 and TCFD: Climate trends and implications for companies**

This session investigates how climate reporting is changing, and what you can do to prepare for increased disclosures related to your carbon emissions.

Plus, as asset managers, investor coalitions and policy makers agree the next steps toward net-zero global emissions at the COP26 conference in Glasgow, we examine how the outcomes will impact company expectations related to ESG.

- Understand the latest developments in climate action and reporting
- Learn how action plans from the COP26 climate conference are likely to impact sustainable investing and requirements of public companies
- Discover how to prepare for investor and regulator expectations related to climate issues
- Discuss how IR and sustainability teams can best communicate their net-zero plans to investors and navigate the challenges presented by forward-looking carbon targets

Moderator: [Laurie Havelock](#), editor-at-large, *IR Magazine*

[Claire Fraser](#), head of stakeholder communications, *Emperor*

[Ulla Paajanen](#), senior vice president of investor relations, *Stora Enso*

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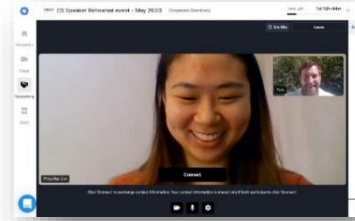
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#### 2.15 pm **Meet the attendees: Networking**

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#### 2.30 pm **Strengthening board oversight on ESG**

Boards are increasingly required to navigate the challenges presented by a variety of ESG factors, and it is important that governance, IR and sustainability professionals ensure the board is prepared, and structured in a way that can effectively manage these risk factors.

- Discover how to accelerate business action on governance in ESG
- As materiality judgements are increasingly a board responsibility, understand how to establish and set up your ESG committees for success
- Learn how to provide decision-useful ESG risk and opportunity data allowing the board and management to address financial risks associated with ESG issues
- Establish a framework that identifies the resources and actions needed to improve environmental and social governance.

Moderator: [Laurie Havelock](#), editor-at-large, *IR Magazine*

[Kimberley Lewis](#), head of active ownership, Schroders

[Brunno Maradei](#), global head of responsible investment, Aegon Asset Management

[Dottie Schindlinger](#), executive director, Diligent Institute

#### **[Interview] The evolution of ESG integration**

To deepen your understanding of ESG integration we speak to Vince Chin from Deutsche Bank to learn about how ESG integration changes the benchmarking of companies and ability to access new pools of capital.

- Discuss the evolving role of ESG integration
- Understand how to benchmark companies on their ESG performance
- Learn how to identify and access new investors which fit your ESG profile

Moderator: [Tim Human](#), senior reporter, *IR Magazine*

[Vince Chin](#), head of DR investor targeting and ESG analytics, Deutsche Bank

#### 3.00 pm **Best practices when telling your ESG story**

Companies who can successfully communicate their ESG story to the right investors can benefit from increased attention, access to funds and reduced costs of capital. However, a lot of information that is communicated to investors is not always decision-useful.

We finish the forum by exploring how and where companies can get maximum benefit from their ESG performance by ensuring that you're getting the right information in front of the right investors in a way that is easily understood.

- Explore how best to target investors and communicate how ESG factors impact your business
- Debate where and how ESG information should be communicated, and whether more emphasis should be put on digital communications as we emerge from the pandemic



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- Discover how to tailor your messaging for all stakeholders, who digest your external ESG-related communications

Moderator: Tim Human, senior reporter, *IR Magazine*

Tish Crawford-Jones, investor relations, Q4

Victor Drozdov, head of IR, Polyus

Anna White, ESG analyst, Fidelity Investments

#### 3.45 pm **[Closing keynote] The future of ESG reporting**

To finish the forum we look at the emerging trends related to ESG reporting. We explore the evolving role of technology, increased stakeholder needs and emerging KPIs to help you develop more accurate, comparable and comprehensive corporate reporting.

- Stay ahead of your peers by understanding which reporting formats are gaining momentum
- Learn about the quality and types of data that your investors and management need to make informed decisions
- Understand developments in systems, processes and technology which can ease reporting fatigue

Moderator: Laurie Havelock, editor-at-large, *IR Magazine*

Erwin Groenendal, co-founder and product evangelist, Tangelo

Linda Freiner, group head of sustainability, Zurich

Phil Redman, offering manager for ESG, OneTrust

#### 4.30 pm **Summary of discussions and end of conference**

Laurie Havelock, editor-at-large, *IR Magazine*