

ESG INTEGRATION FORUM – AUTUMN

Tuesday, November 21, 2023
Clifford Chance Offices, London

THEMES

All times are in GMT

8.00 am **Registration, breakfast and morning networking**

8.50 am **Welcome to the ESG Integration Forum – Autumn**

Jeroen Ouwehand, partner, Clifford Chance

9.00 am **What 2024 has in store: ESG trends to prepare for**

Our opening session takes a birds-eye view of the constantly evolving world of ESG, inviting our expert speakers to share their predictions for the year ahead. This session will situate the context for the forum and prepare delegates for a deeper dive into the current ESG landscape throughout the day.

- Reflect on the key ESG takeaways of 2023 including supply chain challenges, increased shareholder scrutiny, the impact of ESRS adoption and the future of AI integration
- Hear about the wider regulatory landscape, how it's set to evolve over the coming year and how it will alter your disclosure requirements
- Learn where investor sentiment currently stands on ESG and which issues shareholders really want to know more about

Moderator: Hemma Visavadia, reporter, IR Magazine and Governance Intelligence

David Alfrey, lawyer, Clifford Chance

Justin Kew, senior ESG analyst, Balyasny Asset Management

Jan Sohlmann, senior management ESG investor engagement, Bayer

9.45 am **ESG Compliance: Balancing priorities in a dynamic regulatory environment**

The European Commission released its much-anticipated ESRS guidance in July and with the UK Sustainability Disclosure Standards and France's Say on Climate Law, companies face a complex task when it comes to sustainability reporting and data collection. This panel will offer a high-level approach to understanding the myriad differing and converging regulatory standards that exist for public companies across Europe and how to navigate them. Join this session for an update on the latest changes and take a fresh look at how your IR team is balancing different compliance priorities

- Learn how to remain focused and consistent on your specific ESG narrative amid multiple varying frameworks
- Get to grips with what data your company needs to be collecting, synthesizing and sharing with stakeholders

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- Learn how to navigate varying regulations such as ESRS, UK Sustainability Disclosure Standards and France's Say on Climate Law

Moderator: Lauren McDonald, conference producer, IR Magazine and Governance Intelligence
Margot Fransen, general counsel sustainability, global general counsel oral care, Unilever
Simon O'Brien, investor sustainability, BAT
Nuno Teiga Vieira, head of investor relations, CTT

10.30 am **Networking break and morning refreshments**

11.00 am **Crafting your ESG comms: How to decide on, distill and deliver your message**

With sustainability reports growing exponentially, the question of what ESG information to share with stakeholders is a pressing one. This panel will discuss how to prioritize the right messaging and how to craft it into a simplified, yet persuasive narrative

- Learn how to select the most relevant and material ESG information for your stakeholders
- Discover which tools can help you distill your ESG information into a concise, clear, and consistent message
- Discuss when and how to deliver your ESG message to different stakeholder groups
- Learn how to measure and improve the effectiveness and impact of your ESG communications and how to address feedback and challenges

Moderator: Laurie Havelock, editor-at-large, IR Magazine and Governance Intelligence
Angela Catlin, head of investor relations, The Co-Operative Bank
Kim Dabbs, global vice president, ESG & social innovation, Steelcase

11.35 am **Roundtables: Exchange ideas with your peers**

How the roundtables work:

- Choose any of the following topics –the power is in your hands!
- Join the relevant roundtable and discuss with your peers
- At the end of the session, hear a quick roundup from each table on what was discussed

Topics:

- How do you manage ESG data within your supply chain?
- How do you communicate ESG to retail investors?
- How do you balance Environmental, Social and Governance factors in your reporting?
- How do you master your materiality assessment?

Meritxell Soler Farrés, head of retail shareholders relations, CaixaBank
Manuel Taverne, head of investor relations, Knaus Tabbert

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Devin Weiss, ESG lead of the sustainability group, Loring, Wolcott & Coolidge Trust

12.10 pm **Lunch**

1.05 pm **Roundtable recap**

1.15 pm **Activism 101: How to spot the warning signs and prepare a robust response**

With shareholders taking action on climate and making news headlines around the world, companies must recognize that ESG activism is not going away. In this session we will discuss how to spot the warning signs of a shareholder activist threat and how to respond effectively.

- Learn how to identify and assess the warning signs of shareholder activism
- Discover which factors could be making your company vulnerable to ESG activism
- Discuss how to prepare a vigorous response to ESG activism and how to keep your board and stakeholders appropriately informed

Moderator: Lauren McDonald, conference producer, IR Magazine and Governance Intelligence
Jana Jevcakova, managing director, head of ESG international, Morrow Sodali
Roger Leese, partner, Clifford Chance

2.00 pm **Ratings agencies and reporting frameworks: Understanding the Venn diagram of disclosure requirements**

In this session, we will return to the regulatory changes of 2023 and consider how your company should approach reporting and disclosures within this ever-evolving landscape.

- Learn how to align your ESG metrics and indicators with the most relevant and influential ESG reporting frameworks and rating agencies
- Discover how to engage with these reporting standards to improve your ESG ratings and rankings
- Discuss how to communicate your ESG value proposition to your stakeholders through effective reporting and disclosure
- Hear how to benchmark your ESG performance within these frameworks against peers

Moderator: Laurence Taylor, senior conference producer, IR Magazine and Governance Intelligence
Enrico Filippi, ESG and planning director, Technogym
Punam Mehta, assistant general counsel, Mercer
Eva Pekárová, stakeholder dialogue expert, ČEZ Group

2.45 pm **AI and ESG: Game-changing opportunity or risk?**

With constant developments in the capabilities of artificial intelligence, businesses globally are considering how and when to adopt AI-powered strategies into their IR programs. In this session, we

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will look at how to make this transition effective while safe-guarding against the ethical and legal risks inherent to this new technological frontier.

- Learn how AI can enhance your ESG strategy and performance, and how to adopt AI-powered solutions for your IR program, such as data analysis, reporting, engagement, and communication.
- Discover which AI applications and tools are most suitable and beneficial for your ESG goals and challenges, and how to evaluate and select them based on their features, functions and costs.
- Discuss when and how to use AI ethically and responsibly for your ESG activities, and how to safeguard against the potential risks and pitfalls of AI, such as bias, privacy, security, transparency, and accountability

Moderator: Steve Wade, head of content, IR Magazine and Governance Intelligence
Alex Tselentis, partner, Finex

3.30 pm **Group discussion: Overcoming today's ESG challenges**

Please join us for this highly interactive session where we will have an open conversation about the ESG challenges that people are facing and collaboratively work through solutions before we head into networking drinks.

We will be using Slido for this session so please do submit your biggest challenges to the word cloud and discover tips and advice from your peers.

Moderator: Steve Wade, head of content, IR Magazine and Governance Intelligence

4.15 pm **End of conference and networking drinks**