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RI Canada 2023

RI Canada 2023 agenda

Building Momentum for a Just Transition in Canada

Chelsea Hotel – Toronto | 17-18 October 2023

Day one – Tuesday 17th October

8:00 Registration

8:45 Welcome remarks from Responsible Investor

8:50 Chair's opening remarks

Bruce Simpson, Senior Advisor ESG to multiple companies

8:55 Keynote 1: Setting the stage: A view of global and local sustainability landscapes

- Understanding the connection between the global sustainability landscape to local markets
- Taking a look at the emerging trends and areas of focus for Canadian investors
- How we collectively and individually upkeep the momentum for a just transition

Sarah Chapman, Global Chief Sustainability Officer, Manulife

9:10 Plenary 1: Net zero: Challenges, opportunities, next steps

- Three years on from the first net zero pledges, is implementation matching expectations?
- Will Canadian financial institutions be ready for the first round of interim targets?

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- What are emerging as the key challenges around net zero in the Canadian market?
- Could net zero commitments hinder transition financing and the retirement of dirty assets?

Moderator: Bruce Simpson, Senior Advisor ESG to multiple companies

Speakers:

Joy Williams Executive Director, Financial Institution Net-zero Transition Plans, **GFANZ**
 Sarah Chapman, Global Chief Sustainability Officer, **Manulife**
 Brian Minns, Senior Managing Director, Responsible Investing, **University Pension Plan Ontario**

10:00 Plenary 2: Biodiversity: Protecting nature in investment portfolios

- How to actualize KPIs from COP15
- TNFD's nature-based disclosure - Challenges and opportunities for investors
- Assessing the impact of biodiversity loss in the portfolio
- Reliable and consistent biodiversity data

Moderator: Gina Gambetta, Reporter, **Responsible Investor**

Speakers:

Marie de Montlaur, Senior Advisor Sustainability, **CDPQ**
 Puninda Thind, Finance Nature Lead, **The Climate Change High-Level Champions**
 Brandon Lewis, Director, Sustainability, **Manulife Investment Management**
 Jackie Daitchman, Executive Director, ESG Client Coverage: Climate Application Specialist, **MSCI**

10:50 *Networking break*

11:20 Keynote: Sustainable finance in Canada: Where are we now?

- Overview of SFAC
- Update on taxonomy and SFAC's latest work
- Evolution of Canada's policy and regulatory space

*Kathy Bardswick, Chair, **Sustainable Finance Action Council***

Moderator: Gina Gambetta, Reporter, **Responsible Investor**

11:40 Plenary 3: International standard setting, taxonomies, and disclosures

- Taking stock of the EU taxonomy and investor disclosure regulation
- Preparing for ISSB reporting: will investor expectations be met?

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- Double materiality and meeting the EU's CSRD requirements
- To what extent is the regulatory push moving the needle on sustainable investment?

Moderator: Pratima Divgi, Head of Capital Markets, North America, **CDP**

Speakers:

Hyewon Kong, Vice President, Head of Responsible Investing, **(IMCO)**

Michael Jantzi, Independent Review Committee on Standard Setting in Canada, **IFRS**

12:30 Plenary 4: Canadian regulatory and policy landscape

- Status of Canada's taxonomy
- The role of the Canadian Sustainability Standards Board (CSSB)
- Expectations around CSA's climate disclosure proposals

Moderator: Dustyn Lanz, Senior Advisor, **ESG Global Advisors**

Speakers:

Julie Segal, Senior Program Manager Climate Finance, **Environmental Defence**

Dan Byrd, ESG & Climate Industry Practice Lead, **Moody's**

Janet Gillies, Executive Vice-President, Regulatory & Standards, **CPA Ontario**

13:20 Lunch

Stream A	Stream B
<p>14:20 – A1: What makes a credible corporate transition plan?</p> <ul style="list-style-type: none"> • How to assess transition plans? • How to prepare and accomplish transition? • What does it mean to be an existing oil and gas company? • How to mitigate transition risks? <p>Moderator: Stephanie Chow, Director, Climate Finance & Strategy, GFANZ</p> <p>Speakers: Anne-Marie Gagnon, Senior Principal, ESG, Public Markets, BCI</p>	<p>14:20 – B1: Modern slavery legislation: Mitigating forced labor in the supply chain</p> <ul style="list-style-type: none"> • Bill S-211 impact on the supply chain – How are institutions preparing/implementing? • How have other jurisdictions implemented similar legislation? How does it compare? • What are investors doing to mitigating forced labour regarding portfolio companies?

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<p>Andreas Ross, Head of New Product Research and Development, ZAIS Matt Christ, Portfolio Manager, Ninety One</p>	<p>Moderator: Gina Gambetta, Reporter, Responsible Investor</p> <p>Speakers: Kevin Thomas, CEO, SHARE Ashley McIntyre, Senior advisor and subject-matter expert, EDC Michelle Albanese, Professor, Sustainable Supply Chainsat, Seneca</p>
<p>15:05 <i>Networking Break</i></p>	
<p>15:15 – A2: ESG-labelled bonds: The next generation</p> <ul style="list-style-type: none"> • SLBs vs use-of-proceeds: which format is best suited to the Canadian market? • Can nuclear become an accepted part of the green bond universe? • How will biodiversity and nature feature in the next generation of ESG-labelled bonds? • Do transition bonds have a role to play in financing high-emitting sectors? • What greenwashing challenges will be thrown up by new bond formats and KPIs? <p>Speakers: Arthur Kwok, Vice President, Treasurer, Ontario Power Generation</p>	<p>15:15 – B2: Indigenous engagement and reconciliation in investment strategy</p> <ul style="list-style-type: none"> • How to adopt reconciliation principles into the portfolio? • How are boards and asset managers implanting and successfully bridging the gap of indigenous rights? • How to materialise support for the indigenous community? • Understanding and developing better business relationships • Navigating indigenous rights and growing demand for critical minerals in the transition <p>Speakers: James Jenkins, Executive Director, Indigenous Clean Energy Raven Indigenous Impact Foundation (speaker TBC) Eugene Kung, staff lawyer, West Coast Environmental Law</p>
<p>16:00 <i>Networking Break</i></p>	

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<p>16:15 – A3: ESG data: New challenges, new solutions</p> <ul style="list-style-type: none"> • What do upcoming disclosure regimes mean for data providers? • What would effective ESG data regulation look like? • Social to Scope 3: the next ESG data challenges • How can AI help ESG investing? What are the risks and opportunities of using emerging technologies? <p>Moderator: Sean Hackett , Senior Manager, Energy Transition, EDF</p> <p>Speakers: Bob Dannhauser, Senior Advisor, Shift project</p>	<p>16:15 – B3: Nature-based solutions: Investing in biodiversity</p> <ul style="list-style-type: none"> • Identifying opportunities to support nature • How can investors engage effectively with project managers? • Additionally, permanence, community buy-in: the must-haves for NBS • Addressing credibility challenges in the voluntary carbon markets <p>Moderator: Katie Wheatley, Head of Canada, PRI</p>
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17:00 Networking drinks

18:30 End of Day One

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Day Two – Wednesday 18th October

8:00 Registration and refreshments

8:55 Day two chair's opening remarks

*Gina Gambetta, Reporter, **Responsible Investor***

9:00 Interactive roundtable discussions

1. Blue Economy

2. Climate Litigation

3. Methane

Sean Hackett, Senior Manager, Energy Transition, **EDF**

4. Carbon removal

5. TBC

Sharmeen Contractor, Senior Advisor, Market Systems and Investors, **Oxfam**

6. Scaling voluntary carbon markets

Corinne Boone, Group Head, Americas, **AirCarbon**

7. TBC

8. Responsible forestry: Deforestation and supply chain

Pierre Courtemanche, Board member, **Viridis Terra**

10:00 Networking break

Stream A	Stream B
<p>10:15 – A4: Canada's banks and the green economy</p> <ul style="list-style-type: none">• How have changing energy market dynamics affected sustainability thinking in the Canadian banking sector?• Where could Canada's banks do more to support the green economy?• Operationalizing net zero strategies• How can investors engage effectively with banks on net zero and climate finance?	<p>10:15 – B4: Tracking the evolution of proxy voting in Canada</p> <ul style="list-style-type: none">• Key takeaways for investors from the 2023 proxy season• What does the recent increase in ESG shareholder proposals mean for responsible investors?• Will the publication of CEC's company benchmark encourage investors to file more shareholder proposals?

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<ul style="list-style-type: none"> Are Canada's banks ready to finance climate adaptation? <p>Speakers: Kyra Bell-Pasht, Director of Research and Policy, Investors 4 Paris Richard Brooks, Climate Finance Director, Stand.earth</p>	<ul style="list-style-type: none"> Are Canadian investors building escalation pathways on director votes on ESG issues? Which issues are rising up the agenda in Canada in terms of proxy voting? <p>Moderator: Edd Micklem, VP of Investor Partnerships, Tumelo</p> <p>Speakers: Delaney Greig, Director, Investor Stewardship, University Pension Plan Ontario Alyson Slater, Managing Director, Sustainable Investment, Manulife</p>
<p>11:00 – A5: Getting physical: How are investors evaluating and acting on rising physical climate risks?</p> <ul style="list-style-type: none"> Examples of the latest ways to assess and navigate climate-related physical risks Physical risks in the Canadian context Company data, scenarios and modelling Has TCFD reporting helped move the needle? <p>Speakers: Pierre-Luc Gilbert, Analyst, Climate Risk & Sustainable Investment, CDPQ Sophie Heald, Senior Climate Specialist, Ortec Finance Moin Syed, Manager, Sustainable Investing, OMERS</p>	<p>11:00 – B5: Infra ownership and responsibility for Canadian pension funds</p> <ul style="list-style-type: none"> Canadian pension funds are among the biggest infrastructure investors in the world – what does it mean to be a responsible owner of infrastructure globally? Infrastructure and net zero – shifting and future-proofing non-green assets to align with the Paris Agreement Canada's response to US Inflation Reduction Act <p>Speakers: Fred Di Blasio, CEO and Managing Partner, Longhouse Capital Partners</p>
<p>11:45 Networking Break</p>	

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<p>12:00 – A6: Emerging markets: Blended finance and engagement</p> <ul style="list-style-type: none"> • How are Canadian investors approaching stewardship in emerging markets? • What are the key barriers to financing climate resilience and mitigation in EM? • What role can Canada play in promoting mechanisms to support innovative finance? • Balancing the risks, opportunities and impact of blended finance structures <p>Moderator: Alain Longpré, Director, mobilization & blended finance, FinDev Canada</p> <p>Speakers: Chris Clubb, Managing Director, Convergence Blended Finance</p>	<p>12:00 – B6: Diversity disclosure rules: Canada’s time to push the needle?</p> <ul style="list-style-type: none"> • Could the CSA’s proposed diversity disclosure rules make Canada world leading? • How do the two approaches proposed in the rule compare with other international measures? • How are investors getting their own house in order and engaging with portfolio companies on DEI? <p>Speakers: Adrian Mitchell, Head of public equities, HOOP Lindsey Walton, Director of Americas, PRI</p>
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12:45 Lunch

13:35 Keynote 3

*Jeffrey Cyr, CEO, **Raven Indigenous Impact Foundation***

Moderator: Gina Gambetta, Reporter, **Responsible Investor**

13:55 Plenary 5: The path ahead: Navigating ESG headwinds

- Has investing sustainably become more challenging for asset owners over the past two years?
- The impact of the war in Ukraine on how responsible investors manage and engage fossil fuel holdings
- Indigenous rights: Overcoming tick boxing and ensuring robust practice
- What is keeping senior leaders at asset owners up at night in 2023?

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Moderator: Gina Gambetta, Reporter, **Responsible Investor**

Speakers:

Kristina Riis, COO, **Investor Leadership Network (ILN)**

Anna Murray, Senior Managing Director, Global Head of Sustainable Investing, **Ontario Teachers' Pension Plan**

14:45 Plenary 6: Better together? Collective vs individual engagement

- What are the strengths and weaknesses of the two approaches?
- Progress on Climate Engagement Canada – will we see more national climate initiatives?
- Effectiveness of Canadian Coalition for Good Governance's board engagement program
- How do investors select which initiatives to join?
- How are investors managing stewardship resources effectively to maximise impact

Moderator: Anthony Schein, Director of Shareholder Advocacy, **SHARE**

Speakers:

Catherine McCall, Executive Director, **Canadian Coalition for Good Governance (CCGG)**

Carmen Velasquez, Director, Responsible Investment, **Alberta Investment Management Corporation (AIMCo)**

15:35 Chair's closing remarks

15:45 End of conference

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