



responsible
investor

RI Europe 2023

13-14 June
London

Responsible Investor Europe 2023 Agenda

Day one: Tuesday 13th June

8:00-9:00 Registration and morning coffee

8:55-9:00 Welcome remarks
Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**

09:00-9:50 Plenary 1: Net zero: Are financial institutions on track to meet 2025 goals?

- What will be the main challenges in meeting the first round of interim targets?
- Could the risk of missing targets lead to hurried divestment from higher-emitting sectors/jurisdictions?
- How much leeway is built into the system?
- If targets are missed will the credibility of the net zero project be affected?

Moderator: Ben Caldecott, Founding Director of the Oxford Sustainable Finance Group, **University of Oxford**

Speakers:

Innes McKeand, Head of Strategic Equities, **USS Investment Management**
Arne Staal, CEO, **FTSE Russell**, Group Head of Benchmarks & Indices at **LSEG**
Maria Elena Drew, Director of Research, Responsible Investing, **T. Rowe Price**
Morten Nilsson, Chief Executive Officer, **Brightwell**

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09:50-10:20 Day one Keynote

Speaker: Helena Viñes Fiestas, Commissioner of the **Spanish Financial Markets Authority** & Chair of the **EU Platform on Sustainable Finance**

Moderator: Elza Holmstedt Pell, Deputy Editor, **Responsible Investor**

10:20-10:50 Networking break

10:50-11:35 Plenary 2: Just Transition: Who, what, where, how?

- What does Just Transition mean in developed versus emerging markets?
- What does Just Transition mean in different sectors?
- Whose responsibility is the Just Transition: private or public sector?
- How can investors most effectively promote a Just Transition?

Speakers:

Nick Robins, Professor in Practice for Sustainable Finance, **Grantham Research Institute on Climate Change & the Environment**

Colin Baines, Stewardship Manager, **Border to Coast Pensions Partnership**

Moderator: Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**

11:35-12:25 Plenary 3: Regulation: Taking stock of EU sustainability regulation

- Two years of SFDR: an evaluation of implementation and its impact
- Is the 'Article 9 exodus' a sign SFDR is working effectively or a cause for concern?
- Preparing for CSRD: what is the investment community expecting?
- Interoperability or unwanted burden: EU regulation and the rest of the world

Speakers:

Brenda Kramer, Senior Advisor Responsible Investment, **PGGM**

Aleksandra Palinska, Executive Director, **Eurosif**

Eugenia Unanyants-Jackson, Global Head of ESG, **PGIM**

Véronique Menou Lieblich, Global Head of ESG Regulatory Solutions, **MSCI**

Moderator: Elza Holmstedt Pell, Deputy Editor, **Responsible Investor**

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12:25-13:15 Plenary 4: ESG in the polycrisis: The challenges for asset owners

- Has investing sustainably become more challenging for asset owners over the past two years?
- What is keeping senior leaders at asset owners up at night in 2023?
- How are investors balancing the need to meet short terms return hurdles with longer term considerations when selecting assets?
- How are investors prioritising their time and efforts on sustainability – is it really front and centre now?

Speakers:

Michael Marshall, Head of Sustainable Ownership, **Railpen**

Marcus Svedberg, Chief Economist, **Folksam**

JoanneKellermann, Chair, **PFZW**

Faith Ward, Chief Responsible Investment Officer, **Brunel Pension Partnership**

Moderator: Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**

13:15-14:15 Lunch

<i>Stream A</i>	<i>Stream B</i>	<i>Stream C</i>
<p>14:15 A-1: Climate lobbying: behind closed doors</p> <ul style="list-style-type: none">• Assessing corporates' governance of climate policy advocacy: what is best practice?• Have investors been tough enough on climate lobbying?• How and when should investors escalate on climate lobbying?• What is misaligned with Paris when it comes to lobbying? <p>Speakers:</p>	<p>14:15 B-1: What does effective engagement look like?</p> <ul style="list-style-type: none">• Identifying what's possible: what are the limits of corporate engagement?• How do you achieve impact in engagement, how do you measure success?• How and when should investors escalate engagement?• How to balance being a supportive partner while maintaining a critical distance? <p>Speakers:</p>	<p>14:15 C-1: ESG data in 2023: New challenges</p> <ul style="list-style-type: none">• What do upcoming EU disclosure regimes mean for data providers?• What would effective ESG data regulation look like?• Sovereigns to Scope 3: the next ESG data challenges• What are the implications of open source/free data revolution? <p>Speakers:</p>

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<p>Emma Henningsson, Manager Active Ownership, AP7</p> <p>Betina Vaz Boni, Senior Analyst, Governance, Principles for Responsible Investment</p> <p>Hilkka Komulainen, Head of Responsible Investment, Aegon UK</p> <p>Moderator: Paul Verney, Senior Reporter, Responsible Investor</p>	<p>Kiran Aziz, Head of Responsible Investments, KLP</p> <p>Valeria Piani, Head of Stewardship, Phoenix Group</p> <p>Moderator: Nikki Gwilliam-Beeharee, Investor Engagement Strategic Lead, World Benchmarking Alliance</p>	<p>Simone Kramer, Head of Product, Net Zero Data Public Utility</p> <p>Cornelia Andersson, Global Head of Sustainable Finance & Investing, LSEG</p> <p>Murat Sönmez, Co-founder & CEO, PulsESG</p> <p>Moderator: Khalid Azizuddin, Senior Reporter, Responsible Investor</p>
<p>15:00 Short networking break</p>		
<p>15:15 A-2: UK regulation: The next steps</p> <ul style="list-style-type: none"> • What are the key milestones for UK ESG regulation over the coming year? • Should the UK look to learn lessons from the EU? • SDR and the green taxonomy: next steps for investors • Transition plans: what are the lessons from year one? <p>Speakers: Ingrid Holmes, Executive Director, Green Finance Institute</p>	<p>15:15 B-2: Blended finance: creating investible solutions for institutional investors</p> <ul style="list-style-type: none"> • What are the barriers to scaling blended finance? • What can investors, MDBs and policymakers do to increase opportunities? • What are the limitations of blended finance? • What could be alternative public-private structures? <p>Speakers: Dimitri Gvindadze, Director for Climate Strategy and Regional Delivery, European Bank for</p>	<p>15:15 C-2: Fixed income engagement: the power of bond markets</p> <ul style="list-style-type: none"> • How can bond investors most effectively use their leverage to influence companies on ESG? • How should firms be integrating their equity and fixed income engagements? • What strategies should investors use when engaging governments and SOEs? <p>Speakers: Chandra Gopinathan, Senior Investment Manager, Railpen</p>

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<p>Mark Manning, Technical Specialist, Sustainable Finance and Stewardship, Financial Conduct Authority</p> <p>Claudia Chapman, Head of Stewardship, Financial Reporting Council</p> <p>Véronique Chapplow, ESG Investment Specialist, T. Rowe Price</p> <p>Moderator: James Alexander, Chief Executive, UK Sustainable Investment and Finance Association</p>	<p>Reconstruction and Development</p> <p>Ulla Enne, Head of Responsible Investing and Investment Operations, NEST Sammelstiftung</p> <p>Moderator: Lucy Fitzgeorge-Parker, Editor, Responsible Investor</p>	<p>Moderator: Dominic Webb, Reporter, Responsible Investor</p>
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16:00 Extended networking break

<p>16:45 A-3: Corporate transition plans: credibility, consistency, scrutiny</p> <ul style="list-style-type: none"> • What constitutes a credible transition plan in 2023? • Are investors providing consistent messaging to companies with their voting? • Say on Climate: does opposition mean that mechanism is beginning to work? • Rebaselining: will it become a standard ask from investors? <p>Speakers:</p>	<p>16:45 B-3: Engagement in emerging markets: challenges and opportunities</p> <ul style="list-style-type: none"> • Adapting approaches to local market conditions • Equity vs fixed income engagement • The challenge of state ownership and influence • Case studies: Asia, CEE, LatAm <p>Speakers: Karine Hirn, Partner, Chief Sustainability Officer, East Capital</p> <p>Ashok Parameswaran, President & Founder,</p>	<p>16:45 C-3: ESG-labelled bonds: a question of quality</p> <ul style="list-style-type: none"> • How should investors assess SLBs and proposed use of proceeds for impact and credibility? • Are quality issues a question of greenwashing or poorly understood standards? • How can investors best provide feedback to issuers and underwriters on their concerns? • How important are second-party opinion providers to market development?
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<p>Tom Lorber, Director, Head of Climate Private Finance, Children's Investment Fund Foundation</p> <p>Kate Levick, Associate Director, Sustainable Finance, E3G</p>	<p>Emerging Markets Investor Alliance</p> <p>Premier Asset Management, speaker TBC</p> <p>Moderator: Lucy Fitzgeorge-Parker, Editor, Responsible Investor</p>	<p>Moderator: Jo Richardson, Head of Portfolio Strategy, Anthropocene Fixed Income Institute</p> <p>Simone Utermarck, Director, Sustainable Finance, International Capital Market Association (ICMA)</p> <p>Rebecca Palmer, Director, Sustainable Finance Data, ICE</p> <p>Aldo M. Romani, Head of Sustainable Finance, Finance Directorate, European Investment Bank</p> <p>Patrice Cochelin, Head of Sustainable Finance Analytical Governance, S&P Global Ratings</p>
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17:30 Cocktail reception and networking

18:30 End of day one

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Day two: Wednesday 14th June

8:00-9:00 Registration and refreshments

<i>Stream A</i>	<i>Stream B</i>	<i>Stream C</i>
<p>9:15 A-4: Building climate resilience while transitioning to net-zero</p> <ul style="list-style-type: none"> • Are climate mitigation vs adaptation strategies antagonistic? • Will adaptation erode mitigation strategies? • What is the role of finance in fostering adaptation? • Do investors have the necessary information and data to act on climate adaptation? <p>Speakers: Craig Davies, CEO, Cadlas</p> <p>Kelly Christodoulou, Senior ESG Advisor, Investments, AustralianSuper</p>	<p>9:15 B-4: Climate litigation: a growing part of the investor engagement toolkit</p> <ul style="list-style-type: none"> • How does climate litigation fit into the wider engagement toolkit for asset owners? • Where can asset owners achieve the greatest leverage through the use of litigation? • How has the climate crisis affected asset owners' conception of fiduciary duty? • What are the legal risks to asset owners from individual and collective action on climate? <p>Speakers: Alex Cooper, Lawyer, Commonwealth Climate and Law Initiative</p> <p>Charlotta Dawidowski Sydstrand, Head of ESG, AP7</p>	<p>9:15 C-4: The evolving role of benchmarks in ESG investing</p> <ul style="list-style-type: none"> • What should be the minimum criteria for the EU's ESG benchmarks standard? • Why is 'standardisation and transparency' of ESG benchmarks important? • Should there be minimum ESG requirements for broad market benchmarks? • Should ESG funds use broad market benchmarks for construction and reporting? <p>Speakers: Robert Edwards, Director of Product Management – EMEA & ESG Indexes, Morningstar Indexes</p>

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10:00 Networking break

10:30

A-5: Investors and the cost-of-living crisis

- How should investors think about the cost-of-living crisis?
- Should investors take an active role in pay negotiations?
- Is engaging on government policy a political act and beyond investor remit?
- What are the risks for companies of failing to address the cost-of-living crisis?
- Ensuring diversity at investor level

Speakers:

Tom Powdrill, Head of Stewardship, **PIRC**

Janet Williamson, Senior Policy Officer, Rights, International, Social and Economics, **Trades Union Congress**

Delilah Rothenberg, Co-Founder & Executive Director, **The Predistribution Initiative**

10:30

B-5: Deep dive workshop – Biodiversity in public markets

- Can investors achieve biodiversity impact in public equity markets?
- Bringing biodiversity into the ESG-labelled bond market
- Where do investors have the most leverage on biodiversity in terms of engagement and stewardship? What is the future for collective engagement on nature?
- Biodiversity data: what are the challenges? Will TNFD fill the gap?

Speakers:

Hermes, speaker, TBC

Vian Sharif, Head of Sustainability, **FNZ Group**

Helen Avery, Director, Nature Programmes, **Green Finance Institute**

10:30

C-5: Deep Dive workshop – Net zero: meeting interim targets

- Do companies and investors have access to the tools and data they need?
- How close are investors to understanding scope 3 emissions across portfolios?
- How are upcoming mandatory and voluntary disclosure regimes addressing scope 3 emissions?
- How can investors engage with companies on scope 3 emissions measurement, disclosure and reduction?
- Scope 4 emissions: the next disclosure frontier?

Chair: Rory Sullivan, Co-Founder and Director, **Chronos Sustainability**

David Russell, Head of Responsible Investment, **USS Investment Management**

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11:15

A-6: DE&I: Has gender dropped off the agenda?

- Gender “fatigue” – have asset managers moved on to other battles?
- Holistic versus targeted DE&I: which is more effective?
- What has changed in terms of gender parity: a qualitative and quantitative assessment
- Gender initiatives – do they work?

Deborah Gilshan, Founder, **The 100% Club**

Diana van Maasdijk, Co-Founder & CEO, **Equileap**

Moderator: Fiona McNally, Junior Reporter, **Responsible Investor**

Faith Ward, Chief Responsible Investment Officer, **Brunel Pension Partnership**

Lorenzo Saa, Chief Sustainability Officer, **ClarityAI**

12:00 short networking break

12:15

A-7: Antibiotic resistance: what role do investors have in addressing this systemic societal risk?

- The economic and social damage from Covid-19 pales in comparison to the

12:15

B-6: Human rights: due diligence directives

- How can investors prepare for the CSDDD?
- What will be the biggest challenges in implementing the legislation, for a) corporates, b) FIs?

12:15

C-6: Evolution and utility of voluntary carbon markets

- What role can and should VCM play in net zero strategies?
- How should investors engage on carbon credits?

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<p>potential harm from mass antimicrobial resistance (AMR). Are investors sleeping on this issue?</p> <ul style="list-style-type: none"> • What tools and methodologies can investors use to gauge the risks from AMR? • What should be the practical role of investors in addressing AMR? • What are the challenges of engaging with companies on systemic, as opposed to idiosyncratic, risk? <p>Speakers: Sara E. Murphy, Chief Strategy Officer, The Shareholder Commons</p> <p>Emma Berntman, Senior Engagement Specialist, FAIRR Initiative</p> <p>Suzi van Es, Investor Engagement Manager, Access to Medicine Foundation</p> <p>Moderator: Georgia Stewart, CEO, tumelo</p>	<ul style="list-style-type: none"> • Are there early lessons from Germany's due diligence legislation? • How will CSDDD interact with other EU sustainable finance initiatives? <p>Speakers: Maria van der Heide, Head of EU Policy, Share Action</p> <p>Rui Chang, Advisor, Responsible Investment, PGGM</p> <p>Phil Bloomer, Executive Director, Business & Human Rights Resource Centre</p> <p>Moderator: Gina Gambetta, Reporter, Responsible Investor</p>	<ul style="list-style-type: none"> • Are carbon credits suitable for commoditisation? • Countering negative perceptions of nature-based solutions <p>Speakers: Anna Lehmann, Global Climate Policy Director, Wildlife Works</p> <p>Lydia Sheldrake, Director of External Affairs, Voluntary Carbon Markets Integrity Initiative (VCMI)</p> <p>Moderator: Lucy Fitzgeorge-Parker, Editor, Responsible Investor</p>
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13:00 Lunch

14:00 Day two Keynote

Speaker: Kerrie Waring, Chief Executive Officer, **International Corporate Governance Network**

14:30 Plenary 5: The power of nature: Understanding biodiversity risk

- Biodiversity as a systemic risk: how are central banks approaching the challenge?
- Transition risk: how can investors prepare for biodiversity regulation?
- Measuring biodiversity risk across portfolios: methodologies, tools and barriers
- Helping corporates understand the relevance of biodiversity loss to business models

Speakers:

Geraldine Ang, Senior Policy Analyst, Green Finance and Investment, **OECD**

Maria Nazarova-Doyle, Head of Responsible Investments and Stewardship, **Scottish**

Widows

Steven Bullock, Managing Director, Global Head of ESG Innovations and Solutions, **S&P**

Global Sustainable1

Mirtha Kastropeli, Executive Director, Research, and Sector Head – Consumer, **ISS ESG**

Moderator: Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**

15:30 Plenary 6: Standard setting and global interoperability

- CSRD and ISSB: The beginning of a beautiful relationship?
- What degree of interoperability is necessary to alleviate reporting burdens on companies?
- Timelines and ambition: what's the direction of travel for CSRD and ISSB – will expectations be met?
- How can investors help companies prepare for new disclosure standards?

Speakers:

Lois Guthrie, Senior Technical Advisor, **IFRS Foundation**

Elizabeth Lance, Assistant Chief Counsel, **ICI Global**

Murat Sönmez, Co-founder & CEO, **PulseESG**

Moderator: Elza Holmstedt Pell, Deputy Editor, **Responsible Investor**

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16:15 Plenary 7: Strength in numbers? The future of collective engagement

- The big question: is size everything or can smaller groups make a larger impact?
- The problem of free riders: how to make sure all members pull their weight
- Would a more strategic approach that leverages the different capabilities of individual members make collective engagement more effective?
- How can investors navigate anti-trust and acting-in-concert laws across jurisdictions?

Speakers:

Catherine Howarth, Chief Executive, **ShareAction**

Adam Matthews, Chief Responsible Investment Officer, **Church of England Pensions Board**

Peter Taylor, Head of Engagement, **Institutional Investors Group on Climate Change**

Hanna Roberts, Head of Stewardship Services, **Morningstar Sustainalytics**

Moderator: Rory Sullivan, Co-Founder and Director, **Chronos Sustainability**

17:00 End of conference

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