

Driving the future of European sustainable finance

Principal sponsor

S&P Global

Lead sponsors

ISS STOXX 




LSEG

Sponsors

Baillie Gifford[™]

**Federated
Hermes** 
Limited

 **HSBC** Asset Management

MORNINGSTAR

MSCI 

 **PGIM**
GLOBAL ASSET MANAGEMENT

Associate sponsors

 **CLARITY AI**

 **European
Investment Bank**

FACTSET

France Valley
INVESTISSEMENTS

 **ICoCA** The
Responsible
Security
Association

 **ICE**

 **LUXEMBOURG
FOR FINANCE**
THE FINANCIAL CENTRE DEVELOPMENT AGENCY

MUFG Asset Management
 **MUFG** Mitsubishi UFJ Financial Group

SIX

 **Tauw**

Please note, this is a draft document, session timings and descriptions are subject to occasional change.

For program information:
Joana Frade
joana.f@pei.group

For sponsorship opportunities:
William Powell
william.p@pei.group

For registration queries:
Customer Services
customerservices@pei.group

Day one

Wednesday 12 June

8:00 Registration and refreshments

8:55 Opening remarks

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

9:00 Plenary 1: Tackling transition finance: Next steps for investors

- Investing in the energy transition: opportunities and limitations
- Are regulatory regimes designed to support transition finance?
- Defining transition finance: achieving consensus, building guardrails
- Is transition finance compatible with net zero commitments?

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

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

Marcus Svedberg, Chief Economist, **Folksam**

Cathrine De Coninck Lopez, Global Head of Responsible Investment, **HSBC Asset Management**

Jane Goodland, Group Head of Sustainability, **LSEG**

9:50 Plenary 2: Policy and regulation: Sustainable finance in the next EU legislative phase

- What comes next? Hopes, expectations and concerns in the aftermath of EU elections
- SFDR and taxonomy progress: is usability improving?
- The ones that got away: transition, social and stewardship
- CSRD: how are corporates coping in year one?

Moderator: **Elza Holmstedt Pell**, Deputy Editor, **Responsible Investor**
Magali van Coppennolle, Global Head of Policy, **Climate Bonds Initiative**
Piet Klop, Head of Responsible Investment, **PGGM**
Aleksandra Palinka, Executive Director, **Eurosif**

10:40 Networking break

11:10 Keynote 1: Regulation

Verena Ross, Chair, **European Securities and Markets Authority (ESMA)**

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

11:30 Plenary 3: Sustainability standards: Implementation and interoperability

- Expectations for the first round of CSRD reporting
- Interoperability between the big three: is it looking likely?
- Sector standards: what do investors want and need?
- Nature and social under the ESRS and ISSB

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

Kiran Aziz, Head of Responsible Investments, **KLP Insurance Pension Fund**
Nicolaj Sebrell, Director of Investor Relationships – EMEA, **IFRS Foundation**
Elisa Cencig, Head of Policy Engagement, **Norges Bank Investment Management**
Michael Taschner, Head of Sustainability Solutions, **S&P Global Market Intelligence**

12:20 Plenary 4: TNFD: Getting to grips with nature-related reporting

- Lessons from early adopters of the TNFD framework
- Will TNFD provide the data investors need to invest in and engage on nature?
- How does the TNFD align with other initiatives (e.g. SBTN, EFRAG, GRI)?
- Next steps: Update from the TNFD on its work

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

Romie Goedicke den Hertog, Co-Head Nature, **UNEP FI**

Tony Goldner, Executive Director, **TNFD**

Sylvain Vanston, Director of Climate Investment Research, **MSCI**

Till Jung, Managing Director and Head of ISS ESG, **ISS STOXX**

13:10 Lunch

Stream A	Stream B	Stream C
<p>14:10 – A1: Second-mover advantage: UK sustainable finance regulation</p> <ul style="list-style-type: none"> • How are investors feeling about the long-delayed UK green taxonomy? 	<p>14:10 – B1: AGMs and ESG: Is proxy voting losing its lustre?</p> <ul style="list-style-type: none"> • How can investors use their votes most effectively to drive change? 	<p>14:10 – C1: ESG assurance: Rising to the challenge</p> <ul style="list-style-type: none"> • Sustainability assurance: a game changer for comparable and reliable data?

<ul style="list-style-type: none"> • What will political shifts mean for UK regulation on sustainable finance? • Will incorporation of ISSB be pain-free or a compliance nightmare? • How are investors preparing for the implementation of SDR? <p>Moderator: Dominic Webb, Senior Reporter, Responsible Investor</p> <p>Ingrid Holmes, Executive Director, Green Finance Institute</p> <p>Ben Caldecott, Co-Head, Secretariat, Transition Plan Taskforce and Member, UK Climate Change Committee</p> <p>Oscar Thompson, Head of Policy and Regulatory Affairs, UKSIF</p>	<ul style="list-style-type: none"> • How have investor voting patterns evolved over the past two years? • Filing proposals: the challenges and opportunities for investors • How does proxy voting compare with other forms of stewardship in terms of impact? <p>Moderator: Paul Verney, Features Writer, Responsible Investor</p> <p>Paul Lee, Head of Stewardship and Sustainable Investment Strategy, Redington</p> <p>Colin Baines, Stewardship Manager, Border To Coast Pensions Partnership</p> <p>Catherine Howarth, Chief Executive Officer, ShareAction</p>	<ul style="list-style-type: none"> • How valuable is limited assurance to investors? • Dealing with qualified reports • Auditors: are there enough to go around? <p>Moderator: Fiona McNally, Reporter, Responsible Investor</p> <p>Josephine Jackson, Vice Chair, IAASB</p> <p>Jen Sisson, CEO, IGCN</p> <p>Patrick Parent, Chair, Committee of European Auditing Oversight Bodies</p>
<p>14:55 Short turnaround break</p>		
<p>15:00 – A2: ESG ratings: Overhaul or business as usual?</p>	<p>15:00 – B2: Corporate due diligence: Risk, regulation and reporting</p> <ul style="list-style-type: none"> • CSDDD outcome and next steps 	<p>15:00 – C2: ESG-labelled bonds: Ensuring integrity, managing incentives</p>

<ul style="list-style-type: none"> • What do recent developments to regulate or provide guidance for ESG ratings mean in practice for ratings providers and investors? • How can ESG ratings evolve further? • The potential for leveraging forward-looking data from company reporting <p>Moderator: Khalid Azizuddin, Senior Reporter, Responsible Investor</p> <p>Vipul Arora, Partner, ESG and Climate Solutions, Sattva Consulting</p> <p>Alexandra Pavlovskis, ESG Product Strategy Lead, Financial Information, SIX</p> <p>Linda Zeilina, Founder and CEO, ISFC</p>	<ul style="list-style-type: none"> • Investor due diligence approaches and developments • The regulatory outlook across jurisdictions • Managing supply chain risk: the challenges for investors <p>Moderator: Gina Gambetta, Senior Reporter, Responsible Investor</p> <p>Jamie Williamson, Executive Director, ICoCA</p> <p>Isabella Ritter, Senior EU Policy Officer, ShareAction</p> <p>Aleksandra Palinska, Executive Director, Eurosif</p>	<ul style="list-style-type: none"> • Will the EU Green Bond Standard prove successful in raising quality? Are other jurisdictions likely to follow? • Is the SLB market reaching its moment of maturity after long periods of controversy? • How are investors pricing SLB step-ups? <p>Moderator: Dominic Webb, Senior Reporter, Responsible Investor</p> <p>Anand Rajagopal, Private Markets Sustainability Lead, Phoenix Group</p> <p>Simone Utermarck, Senior Director, Sustainable Finance, ICMA Group</p> <p>Irina Velieva, Director, Sustainable Finance, S&P Global Ratings</p> <p>Peter Munro, Head of Division, Investor Relations and Sustainable Finance, EIB</p>
---	---	--

15:45 Networking break

16:00 Workshops

This session allows participants to learn from both experts and each other, providing interactive small group discussions guided by designated facilitators.

<u>Workshop A - Carbon markets</u>	<u>Workshop B - Climate adaptation</u>	<u>Workshop C - Scope 3</u>	<u>Workshop D - Critical minerals</u>	<u>Workshop E - Social data</u>
<p>Co-Facilitator: Arnaud Filhol, CEO, France Valley</p> <p>Co-Facilitator: Julie Moret, Global Head of Sustainable Investing and Stewardship, Northern Trust Asset Management</p> <p>Co-Facilitator: Michael Wilkins, Executive Director & Professor of Practice, Centre For Climate Finance & Investment, Imperial College Business School</p>	<p>Co-Facilitator: Craig Davies, CEO, Cadlas</p> <p>Co-Facilitator: Alex Kennedy, Head, Sustainable Finance Solutions, Standard Chartered Bank</p> <p>Co-Facilitator: Catherine Bremner, Chief Strategy Officer, Impax Asset Management</p>	<p>Co-Facilitator: Claire Elsdon, Global Director, Capital Markets, CDP</p> <p>Co-Facilitator: James Vaccaro, Chief Catalyst, Climate Safe Lending Network</p>	<p>Facilitator: Phil Bloomer, Executive Director, Business & Human Rights Resource Centre</p>	<p>Co-Facilitator: Signe Andreasen Lysgaard, Chief Adviser, Human Rights and Business</p> <p>Co-Facilitator: Clare Richards, Director, Social, Responsible Investment, Church of England Pensions Board</p> <p>Co-Facilitator: Shavana Haythornwaite, ESG Research Associate Director, Human Rights and Conflict Zones, Morningstar Sustainalytics</p>

17:00 Networking drinks

18:30 End of day one

Day two

Thursday 13 June

8:00 Registration and refreshments

8:00 Invitation only AO breakfast

Join fellow asset owners for a breakfast briefing and peer-to-peer discussions. This is a closed-door session for asset owners only.

Hilkka Komulainen, Head of Responsible Investment, **Aegon UK**

Patrick Peura, ESG Engagement Manager, Allianz Investment Management, Co-lead of the **Net-Zero Asset Owner Alliance**

Engagement Track

Ed Collins, Director, **InfluenceMap**

Stream A	Stream B	Stream C
<p>9:00 – A3: Deep dive: Assessing corporate transition plans</p> <ul style="list-style-type: none"> What makes a credible transition plan? 	<p>9:00 – B3: Deep dive: Scenario analysis: An investor’s guide</p> <ul style="list-style-type: none"> Physical risk vs transition risk Understanding central bank models 	<p>9:00 – C3: Deep dive: TNFD reporting</p> <ul style="list-style-type: none"> Tools and methodologies Corporate case study Investor perspective

<ul style="list-style-type: none"> • Models and methodologies assessed • Sectoral approaches and distinctions • Timelines for transition • The role of carbon pricing and offsets in transition plans <p>Moderator: Carmen Nuzzo, Professor in Practice - Executive Director, Transition Pathway Initiative Centre LSE</p> <p>Honor Fell, Associate Director and Sustainable Investment Lead, University of Cambridge Asset Management</p> <p>Rafel Servent, Engagement Manager, MUFG Asset Management</p> <p>Claire Dorrian, Head of Sustainable Finance, Capital Markets and Post Trade, LSEG</p>	<ul style="list-style-type: none"> • Lessons from the insurance industry <p>Moderator: Jakob Thomä, Co-Founder & Research Director, Theia Finance Labs</p> <p>Sandy Trust, Chair, IFOA’s Sustainability Board</p> <p>Jean Boissinot, Head of Secretariat, Network for Greening the Financial System (NGFS)</p> <p>Agnieszka Trzcińska, Team Lead of Financial Stability, European Central Bank</p> <p>Girish Narula, Head of Sustainable Finance, EMEA and APAC, ICE</p>	<p>Moderator: Romie Goedicke den Hertog, Co-Head Nature, UNEP FI</p> <p>Stephanie Hime, Director and founder, Little Blue Research</p> <p>Steven Bullock, Managing Director, Global Head of Research and Methodology, S&P Global Sustainable1</p> <p>Elisa Vacherand, Deputy Practice Leader, Finance, WWF International</p>
<p>9:40 – A4: Engagement in emerging markets</p>	<p>9:40 – B4: Nature data: Measurement, metrics, missing pieces</p>	<p>9:40 – C4: What’s in a name: Navigating the regulatory focus on fund names</p>

- Bonds vs equities: where are the greater opportunities for influence?
- Public sector: engaging with sovereigns and SOEs
- Making and measuring impact through engagement
- Strength in numbers: the power of collaborative engagement

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

Olga Hancock, Head of Responsible Investment, **Church Commissioners for England**

Amy Wilson, Head of Stewardship Team, **Norges Bank Investment Management**

Peter Taylor, Corporate Programme Director, **IIGCC**

Alasdair Docherty, Sustainable Finance and Data Analyst, **Institute for Energy Economics and Financial Analysis (IEEFA)**

- How are innovations in location-specific data filling in the gaps?
- How are investors approaching the biodiversity metric debate?
- Is ocean ecosystem data the next frontier?
- What does contributing to “nature positive” mean?
- How are investors starting to set nature targets for their portfolios?

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

Micha van den Boogerd, Director Responsible Investment Services, **TAUW Group**

Serkan Batir, Managing Director, Global Head of Product Development, **ISS STOXX**

Jimena Alvarez, Lead Greening Finance for Nature, Resilience & Development Group, Environmental Change Institute, **University of Oxford**

- How should the European Commission balance ambition and interoperability in its SFDR reforms?
- How are managers preparing for the UK labels to come into force?
- Is there still a role for voluntary labels or have they had their day?
- Do new naming rules eliminate the possibility of greenwashing or are there still gaps?

Moderator: **James Alexander**, Chief Executive, **UK Sustainable Investment and Finance**

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

Sara Woodroffe, Manager ESG Policy & Advisory Team, **Financial Conduct Authority**

Lorenzo Saa, Chief Sustainability Officer, **Clarity AI**

10:20 – A5: Sustainability and insurers: limitations and opportunities

- Understanding the specific sustainability requirements of insurers as asset owners
- How has Solvency II affected insurers’ ability to finance the energy transition?
- Where are the main opportunities for insurers in ESG investing in 2024?

Moderator: **Rory Sullivan**, CEO, **Chronos Sustainability**

Sindhu Krishna, Head of Sustainable Investment, **Phoenix Group**

Mette Emsholm Gahr, Climate Investment Analyst, **Zurich Insurance**

10:20 – B5: Climate lobbying: Trade associations, transparency and reporting

- Are companies becoming more receptive to investor engagement on lobbying?
- Has lobbying really risen up the agenda of investors or just a “noisy few”?
- The role of trade associations
- Investor-company case study post trade review

Moderator: **Paul Verney**, Features Writer, **Responsible Investor**

Tom Lorber, Director of Climate Finance & Accountability, **CIFF**

Delaney Greig, Director, Investor Stewardship, **University Pension Plan Ontario**

Vaishnavi Ravishankar, Head of Stewardship, **Brunel Pension Partnership**

10:20 – C5: ESG data: Meeting the evolving needs of responsible investors

- What will CSRD and other corporate disclosures mean for ESG data users and providers?
- What type of data is lacking – what are some emerging data points that investors want?
- How much is too much? Estimations and models

Moderator: **Khalid Azizuddin**, Senior Reporter, **Responsible Investor**

Nicoletta Centofanti, CEO, **Luxembourg Sustainable Finance Initiative (LSFI)**

Mandy Chung, Vice President, ESG Product Manager, **FactSet**

Theodor Christensen, CEO, **Envira**

Frédéric Ducoulombier, Founding director, **EDHEC-Risk Climate Impact Institute**

11:00 Networking break

11:30 Keynote: Bridging the gap: Science and nature finance

Douglas Gurr, director of the Natural History Museum, discusses the outlook for biodiversity policymaking, the implications for investors, and how scientists and public institutions can help drive finance to address nature loss

Doug Gurr, Director, **Natural History Museum**

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

11:50 Plenary 5: Deforestation, water, pollution: Where should investors start with biodiversity?

- What are the challenges and opportunities in addressing different drivers of nature loss?
- Where are corporates currently focusing their nature strategies?
- What role should data availability play in determining investors' biodiversity strategy?
- Which tools are most effective for investors in addressing biodiversity loss?

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

Robin Millington, CEO, **Planet Tracker**

Anita de Horde, Co-founder and Executive Director, **Finance for Biodiversity**

Eva Cairns, Head of Responsible Investments and Stewardship, **Scottish Widows**

12:30 Lunch

13:10 Fireside chat: Evolution of ESG

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

Colin Melvin, Founder and Managing Director, **Arkadiko Partners**

Paul Clements-Hunt, Founder, **The Blended Capital Group**

13:35 Plenary 6: From activism to compliance: The changing face of sustainability in institutional investment

- How have the roles and remits of sustainability and responsible investment professionals at institutional investors evolved over the past 10 years?
- What have these changes meant for the relationship between asset owners and asset managers?
- Has the increasing reporting burden diverted resources away from stewardship and engagement?
- How can sustainability professionals most effectively drive change in their organisations and the wider industry going forward?

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

David Russell, Chair, **Transition Pathway Initiative**

Leanne Clements, Head of Responsible Investment, **People's Partnership**

Will Martindale, Co-founder, **Canbury Insights**

14:15 Networking break

14:25 Plenary 7: Return on engagement: Measuring the impact of stewardship

- How can investors best track and report on stewardship impacts?
- Active ownership vs passive ownership
- How can impact and influence be assigned in collaborative engagements?
- What do asset owners want to see from managers on stewardship impact?

Moderator: **Deborah Gilshan**, Head of ESG and Stewardship, Europe, **AustralianSuper**
Hilkka Komulainen, Head of Responsible Investment, **Aegon UK**
Bruce Duguid, Director, Head of Stewardship, **Federated Hermes**
Patrick Peura, ESG Engagement Manager, **Allianz Investment Management**, Co-lead of the **NZAOA Engagement Track**
Eugenia Unanyants-Jackson, Global Head of Environmental, Social & Governance, **PGIM**

15:10 Plenary 8: Making the case for 1.5C: Investor strategies

Few investors that have set 1.5C targets for their investments have rolled back on these goals despite it looking unlikely that this target will be met. But what is actually feasible for asset managers and asset owners if the real economy doesn't decarbonise fast enough? This panel will see a number of investors make the case for how they view 1.5C, what they're doing to ensure Paris-alignment and the challenges they face.

Moderator: **Jakob Thoma**, Co-Founder & Research Director, **Theia Finance Labs**
Michiel De Smet, Sustainable investment expert, **National Bank of Belgium**
Adam Gillett, Senior Investment Director, **Railpen**
Caroline Cook, Head of Climate Change, **Ballie Gifford**
Laura Hillis, Director of Climate and Environment, **Church of England Pensions Board**
Robert Edwards, Director of Product Management, **Morningstar Indexes**

16:00 Closing remarks and end of conference