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# RI Europe 2016

Investing in the future

22-23 June, London



## AGENDA

DAY 1, Wednesday 22 June 2016

8.00 – 9.00	Registration, refreshments and networking
9.00 – 9.15	Chairman's introduction Hugh Wheelan, Managing Editor, <b>Responsible Investor</b>
	Lead sponsor Introduction: Michael Baldinger, Chief Executive Officer, <b>RobecoSAM</b>
9.15 – 9.35	Keynote address: Helen Mountford, Director of Economics, <b>World Resources Institute</b> and Program Director, <b>New Climate Economy (NCE) initiative</b>  The NCE, part of <a href="#">The Global Commission on the Economy and Climate</a> is a major international initiative to examine how countries can achieve economic growth while dealing with the risks posed by climate change. Chaired by former President of Mexico Felipe Calderón, the Commission comprises former heads of government and finance ministers and leaders in the fields of economics and business.
9.35 – 10.25	Plenary 1: <b>The reality of the future energy mix, investing in green infrastructure and the climate change theme</b> <ul style="list-style-type: none"> <li>Why some asset owners are betting big, others are hesitating, and many are sitting on their hands...</li> <li>Has COP21 really changed anything for investors?</li> </ul> Speakers: Francis Condon, Senior SI Analyst (Mining/Oil/Gas), <b>RobecoSAM</b> Barry Gardiner MP, Shadow Minister for Energy and Climate Change, <b>The Labour Party</b> Julia Haake, Director International Business Development, <b>oekom research</b> Martin Skancke, Chair, Board, <b>Principles for Responsible Investment</b> Moderator: Stephanie Pfeifer, Chief Executive Officer, <b>Institutional Investors Group on Climate Change</b>
10.25 – 11.05	Morning networking break
11.05 – 12.00	Plenary 2: <b>Faith investing plenary. Building a bridge between the world's big institutional faith investors and ESG</b>  What are faith investors doing that is different, and how are investment strategies/products advancing to meet their evolving needs?  Speakers: Stephen Beer, Chief Investment Officer, <b>Central Finance Board of the Methodist Church</b> Omar Shaikh, Advisory Board member, <b>Islamic Finance Council UK</b> Josh Zinner, Chief Executive Officer, <b>The Interfaith Center on Corporate Responsibility</b> Moderator: Peter Chapman, Executive Director, <b>SHARE</b>



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12.00 – 12.25	<b>RI Awards 2016</b> Asset Owner Awards sponsored by <b>Bank J. Safra Sarasin</b> Asset Manager Awards sponsored by <b>MSCI</b>
12.25 – 13.15	<b>Plenary 3: Leadership, Culture and Change: how do we make responsible investment mainstream?</b> <ul style="list-style-type: none"> <li>Winning over hearts, not just minds in the quest for sustainable financial markets</li> </ul> Speakers: Remy Briand, Managing Director and Global Head of Research, <b>MSCI</b> Louise Davidson, Chief Executive Officer, <b>Australian Council of Superannuation Investors</b> Philippe Desfossés, Chief Executive Officer, <b>ERAFF</b> Mary Jane McQuillen, Managing Director, Portfolio Manager and Head of ESG Investment, <b>ClearBridge Investments</b> Moderator: Rob Lake, Principal, <b>Rob Lake Advisors</b>
13.15 – 14.15	Networking lunch sponsored by <b>FTSE Russell</b>

## The RI Matrix/Breakout Panels:

	Stream 1	Stream 2	Stream 3
14.15 – 14.55	a) What carbon regulation/footprinting will asset owners/managers have to report on? How can investment portfolios be decarbonised without investment risk?  Moderator: Ian Simm, Chief Executive, <b>Impax Asset Management</b>  Lauren Smart, Executive Director, <b>Trucost</b>  Peter Smith, Investment Officer, <b>The Pensions Trust</b>	a) The OECD Guidelines for Multinational Enterprises: how do they apply to investors?  Moderator: Adrienne Margolis, Founder and Editor, <b>Lawyers for Better Business</b>  Roel Nieuwenkamp, Chair, <b>OECD Working Party on Responsible Business Conduct</b>  Flavia Micilotta, Executive Director, <b>EUROSIF</b>	a) The cutting edge of integration into equities  Moderator: Mark Nicholls, Independent Finance Journalist  Ben Corris, Portfolio Manager, Quantitative Equity Products, <b>Schroders</b>  Karlijn van Lierop, Head of Responsible Investment and Governance, <b>MN</b>
15.00 – 15.40	b) What are low carbon funds investing in, and are they delivering returns and real CO <sub>2</sub> reductions?	b) Impact investing, and measuring positive results	b) Managing Carbon Risks: Innovative Methods and Indices



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	<p>Moderator: Dominique Blanc, Director, Head of Research, <b>Novethic</b></p> <p>Martijn Oosterwoud, Head Client Portfolio Management, <b>RobecoSAM</b></p> <p>Jakob Thoma, Deputy Director, <b>2 Degrees Investing Initiative</b></p>	<p>Moderator: Pradeep Jethi, Co-founder and Advisor, <b>Social Stock Exchange</b></p> <p>Edward Siegel, Managing Director, <b>Big Issue Invest</b></p> <p>Ambika Sampat, Business Development Manager, <b>Acumen</b></p>	<p>Moderator: Sophie Robinson-Tillett, Deputy Editor, <b>Responsible Investor</b></p> <p>David Lunsford, Head of Development, <b>Carbon Delta</b></p> <p>Mamadou-Abou Sarr, Global Head of ESG, <b>Northern Trust Asset Management</b></p>
15.40 – 16.20	Afternoon networking break sponsored by <b>Impax Asset Management</b>		
16.20 – 17.00	<p>c) The explosion in ESG in wealth management: what's happening and why?</p> <p>Moderator: Susanne Bregy, Managing Director, <b>Rhodanus Capital</b></p> <p>Bonny Landers, Head of Sustainable Responsible and Impact Investing, <b>Sandaire Investment Office</b></p> <p>Flavia Micilotta, Executive Director, <b>EUROSIF</b></p>	<p>c) Engaging companies on climate change</p> <p>Moderator: Mike Tyrrell, Editor, <b>www.SRI-CONNECT.com</b></p> <p>Bruce Duguid, Director of Engagement, <b>Hermes Investment Management</b></p> <p>Edward Mason, Head of Responsible Investment, <b>Church Commissioners for England</b></p>	<p>c) ESG in smart beta. Building a sustainable approach to low volatility equity investment strategies such as Minimum Variance: a virtuous combination?</p> <p>Moderator: Hugh Wheelan, Managing Editor, <b>Responsible Investor</b></p> <p>Alice Martinou, Senior Advisor in SRI and Impact Investing, <b>BNP Paribas Wealth Management</b></p> <p>Bruno Monnier, Portfolio Manager and Quantitative Analyst, <b>Ossiam</b></p>
17.05 – 17.45	<p>d) Environmental reporting: what could the work of the Financial Stability Board's climate task force mean for companies and investors?</p>	<p>d) ESG and Big Data: generating value for asset owners with/through financial data science</p> <p>Moderator: Carlota Garcia-Manas, Engagement Manager, <b>National</b></p>	<p>d) Sustainable infrastructure: building the cities and transport of the future.</p> <p>Moderator: Maia Kutner, Head of Cities, <b>CDP</b></p>



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	<p>Moderator: Hugh Wheelan, Managing Editor, <b>Responsible Investor</b></p> <p>Jane Ambachtsheer, Partner and Global Head of Responsible Investment, <b>Mercer</b> and Member, <b>FSB Task Force on Climate-related Financial Disclosures</b></p> <p>Russell Picot, Special Adviser, <b>FSB Task Force on Climate-related Financial Disclosures</b></p>	<p><b>Institutions of the Church of England</b></p> <p>Andreas Hoepner, Associate Professor of Finance, <b>ICMA Centre, Henley Business School</b></p> <p>Pierin Menzli, Head Sustainable Investment Research, <b>Bank J. Safra Sarasin</b></p>	<p>Emke Bus, Managing Director, ESG and Infrastructure, <b>GRESB</b></p> <p>Michael Mainelli, Chairman, <b>Z/Yen</b></p>
17.45 – 18.00		<p><b>Announcing the Deep Data Initiative: enhancing data delivery standards for fund managers</b></p> <p>Speaker: Andreas Hoepner, Associate Professor of Finance, <b>ICMA Centre, Henley Business School</b></p>	
17.45 – 19.30	Cocktails reception and networking sponsored by <b>RobecoSAM</b>		

DAY 2, Thursday 23 June 2016

## The RI Matrix/Breakout Panels:

8.15 – 9.00	Registration and Refreshments		
	Stream 1	Stream 2	Stream 3
9.00 – 9.40	<p>e) Water stress: a deeply under-exposed investment risk</p> <p>Moderator: Liesel van Ast, Natural Capital Declaration Programme Manager, <b>Global Canopy Programme</b></p>	<p>e) Corporate lobbying: what should investors be aware of, and what could they learn?</p> <p>Moderator: Kirsty Collins, Sustainability and IR strategy advisor</p>	<p>e) Corporate bonds: are ESG issues putting bond ratings at risk?</p> <p>Moderator: Daniel Brooksbank, Editor, <b>Responsible Investor</b></p>



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	<p>Emir Borovac, Responsible Investments Analyst, <b>Nordea Asset Management</b></p> <p>Marwa Hammam, Executive Director, Master of Finance Programme, <b>Cambridge Judge Business School</b></p>	<p>Charlotta Dawidowski Sydstrand, ESG Manager and Strategist, <b>AP7</b></p> <p>Ben Fagan-Watson, Research Fellow, Policy Studies Institute, <b>University of Westminster</b></p> <p>Louise Rouse, Investor Engagement Consultant, <b>Rouse Research &amp; Consulting</b></p>	<p>Pascal Coret, Head of Fixed Income, <b>Caisse des Dépôts</b></p> <p>Felipe Gordillo, Senior SRI/ESG analyst, <b>BNP Paribas Investment Partners</b></p> <p>Tomi Nummela, Associate Director, Investment Practices, <b>Principles for Responsible Investment</b></p>
9.45 – 10.25	<p>f) How to impact invest in listed equities?</p> <p>Moderator: Daniel Ingram, Head of Responsible Investment, <b>BT Pension Scheme Management</b></p> <p>Jonathan Dean, Portfolio Manager, <b>AXA Investment Managers</b></p> <p>Paul Udall, Partner, <b>Temporis Capital</b></p>	<p>f) How can investors support climate transition and how do we know we are getting there or even arrived? Explaining the Transition Pathway Initiative</p> <p>Moderator: Adam Matthews, Secretary of the Ethical Investment Advisory Group, <b>Church of England</b></p> <p>Rory Sullivan, <b>Independent Consultant</b></p> <p>Faith Ward, Chief Responsible Investment and Risk Officer, <b>Environment Agency Pension Fund</b></p>	<p>f) Social impact bonds: after the initial hurdles, the big society roll-out?</p> <p>Moderator: Vibeka Mair, Senior Reporter, <b>Responsible Investor</b></p> <p>Martin Rich, Director, <b>Social Finance</b></p> <p>Owen Thorne, Investment Officer, <b>Merseyside Pension Fund</b></p>
10.25 – 11.05	Networking break		
11.05 – 11.45	<p>g) Are the United Nations' Sustainable Development Goals an investable theme?</p> <p>Moderator: Catherine Howarth, Chief Executive, <b>ShareAction</b></p>	<p>g) Food: how are today's eating trends and regulations driving company prospects?</p> <p>Moderator: Helena Vines Fiestas, Head of Sustainability Research, <b>BNP Paribas Investment Partners</b></p>	<p>g) Green bonds: have they gone international: the huge growth potential of China and India</p> <p>Moderator: Jessica Robinson, Head of Asia (ex-Japan), <b>Principles for Responsible Investment</b></p>





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	<p>Edward Davey, Senior Programme Manager, <b>International Sustainability Unit (The Prince of Wales's Charitable Foundation)</b></p> <p>Emma Doner, Project Manager, Innovation Team, <b>Vigeo Eiris</b></p>	<p>Martin Barrow, Associate Director (Head of Footprinting), <b>The Carbon Trust</b></p> <p>Neil Brown, Investment Manager, Pan European Equities, <b>Alliance Trust Investments</b></p>	<p>Anne-Charlotte Hormgard, Senior Manager, Asset Management, <b>AP3</b></p> <p>Sean Kidney, CEO and Co-founder, <b>Climate Bonds Initiative</b></p>
11.50 – 12.30	<p>h) The rise of NGO finance campaigns, what next and to what effect? ShareAction, Carbon Tracker, Divest-Invest, Positive+Investment</p> <p>Moderator: Laurie Havelock, Reporter, <b>Responsible Investor</b></p> <p>Ellen Quigley, Doctoral Candidate, <b>University of Cambridge</b></p> <p>Tim Valentine, Emeritus Professor of Psychology, <b>Goldsmiths, University of London</b></p>	<p>h) Laying down pension fund ESG Red Lines: The Association of Member Nominated Trustees outlines what their fund managers' basic approach to corporate sustainability issues should be.</p> <p>Moderator: Neil Davies, Associate, Investment Consulting, <b>Barnett Waddingham</b></p> <p>Ray Shepherd, Member Nominated Trustee, <b>The Institute of Cancer Research</b></p> <p>Peter Sparkes, AMNT/Trustee, <b>Thomas Cook DC</b></p> <p>Janice Turner, Co Chair, <b>AMNT</b></p>	<p>h) Investing into Africa: How European and African investors are allocating assets responsibly</p> <p>Moderator: Howard Pearce, Executive Director, <b>HowESG</b></p> <p>Jon Duncan, Head of Responsible Investments, <b>Old Mutual</b></p> <p>Gunter Fischer, Senior Investment Officer, <b>Global Energy Efficiency and Renewable Energy Fund, EIB</b></p>
12.30 – 13.30	Networking lunch		
13.30 – 13.45	<p>Keynote address: Jeroen Hooijer, Acting Director Civil Justice, Directorate General Justice and Consumers, <b>European Commission</b></p> <p>Update on the Shareholder Rights Directive and the EU consultation on ESG information in investment decisions.</p>		
13.45 – 14.40	Plenary 4: <b>Proving the value of ESG data, investment activity and governance</b>		

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How can ESG sustainability research, investment allocations and related practices (governance and engagement) demonstrate their value to investment returns?

Speakers: Jean-Nicolas Caprasse, European Business Head, **ISS**  
Jeroen Hooijer, Acting Director Civil Justice, Directorate General Justice and Consumers, **European Commission**  
Christianna Wood, Chairman, **Global Reporting Initiative**  
Diederik Timmer, Executive Vice President, Institutional Relations, **Sustainalytics**  
Moderator: Daniel Brooksbank, Editor, **Responsible Investor**

14.40 – 15.10

Networking break

15.10 – 16.05

Plenary 5: **Long-term investment and the future of asset management**

- What is the problem with short-termism? Why is long-term investing better?
- How are asset owners evolving their long-term investment strategies, and are asset managers/service providers evolving with them? Regulatory drivers?
- Disruption in business models in response to ESG risks/opportunities. How could ESG thinking and measurement shift business and investors towards long-term return opportunities
- What could Brexit mean for long-termism/ESG?

Speakers: Bertille Knuckey, Head of Sustainable and Responsible Investment, **Sycomore Asset Management**  
Mark Mansley, Chief Investment Officer, **Environment Agency Pension Fund**  
Kelly Tang, Director, Global Research and Design, **S&P Dow Jones Indices**  
Paul Woolley, Senior Fellow, **London School of Economics**  
Moderator: Hugh Wheelan, Managing Editor, **Responsible Investor**

16.05 – 16.25

**Book launch interview: How the financial system fails us, and how to fix it.** Hugh Wheelan speaks with David Pitt Watson, Executive Fellow of Finance at the **London Business School**, Chair, **UN Environment Programme Finance Initiative**.

16.25 – 17.20

**The Great Debate: two debating teams lay out their arguments over the future of ESG ratings and reporting. Then YOU decide!**

## **Preamble**

The ranking and rating of funds and managers on sustainability and corporate governance is at an early stage in its development and needs to improve significantly if it is to engage individual investors and beneficiaries and mainstream investment analysts and fund marketers.  
... but ...

**"This House believes that, on the issue of ranking and rating of funds and managers, our industry is moving in the right direction..."**



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## FOR THE MOTION

- Naomi English, Head of ESG Products for EMEA and APAC, **MSCI**
- Fiona Reynolds, Managing Director, **Principles for Responsible Investment**

## AGAINST THE MOTION

- Seb Beloe, Partner, Head of Research, **WHEB Asset Management**
- Jennifer Anderson, Investment Officer, **The Pensions Trust**

Chair: Mike Tyrrell, Editor, **www.SRI-CONNECT.com**

Roving audience provocateur: Hugh Wheelan, Managing Editor, **Responsible Investor**

17.20 – 17.25

Closing remarks