

# Integrating ESG into Mainstream Portfolios

Wednesday 12 November, NH Barbizon Palace, Amsterdam

in partnership with TBLI CONFERENCE™ EUROPE 2008

## Confirmed sponsors




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The UN PRI Report on Progress 2008 includes the key finding that: “Principle 1 of the PRI, which focuses on incorporating ESG issues into investment analysis and decision-making, was ranked the most difficult to implement.”

*Integrating ESG into Portfolios* is a one-day seminar examining how investors can integrate environmental, social and corporate governance issues into mainstream investment analysis and decision-making, including the wider portfolio impacts.

**Delegates will hear from practitioners who will deliver knowledge and insights gained via their first-hand experience. The entire event will focus on best practice.**

**And, in a unique format for this one-day “educate and debate” seminar, each segment will feature two top-level speakers making targeted presentations on ESG integration for 5–7 minutes, followed by a 5 minute discussion session among delegates ending in a 5–10 minute directed Q&A session with the speakers.**

## Confirmed speakers include:

- Jeanett Bergan, head of responsible investments, KLP, Norway
- Erik Breen, head of corporate governance and sustainability, Robeco, Netherlands
- Kris Douma, head of responsible investment support and active ownership, Mn Services, Netherlands
- Christopher Greenwald, director of data content, ASSET4
- Paul Haines, head of investments, Daily Mail General Trust, UK
- Martijn Huijnen, portfolio manager socially responsible investing, SPF Beheer, Netherlands
- Marcel Jeucken, head of responsible investment, PGGM Investments, Netherlands
- Alfred Kool, managing partner, Kool Baas & De Quelerij, Netherlands
- Peter Kraneveld, international pensions advisor, Prime BV, Netherlands
- George Möller, CEO, Robeco
- Christian Ragnartz, chief investment analyst, AP7, Sweden – TBC
- Rory Sullivan, head of responsible investment, Insight Investment
- Toni E Symonds, chief consultant, California State Assembly Committee on Jobs, Economic Development, and the Economy, USA
- Jeremy Willems, director of SRI investments, Fonds de Réserve pour les Retraites (FRR), France
- Angela de Wolff, managing partner, ConSer Invest, Switzerland

## Plus Special One Hour Workshop presented by the Vereniging van Beleggers voor Duurzame Ontwikkeling (VBDO) examining:



- › Exclusions › ESG criteria when selecting shares › Engagement
- › Voting policy › Sustainable project financing.
- Discussion of international similarities and differences with respect to RI policy and implementation
- Q&A & Conclusion

## Further information

- Full agenda on Pages 2 & 3
- Booking form on Page 4

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## Agenda as at 16 September 2008

*All named speakers are confirmed. All unconfirmed speakers are shown as TBC.*

- 9.15** *Chairman's intro: Hugh Wheelan, Editor, Responsible Investor: **There has been spectacular growth in ESG integration as a major topic for institutional investors. But what does it mean?*** (presentation of RI Landscape results on integration)
- 9.30–10.10** **UNPRI – presentation of the second annual progress report – what do the findings say about ESG integration? What is working and what is proving more difficult to achieve and why? What is planned for UNPRI in the coming year?**  
*UNPRI representative – TBC*
- 10.10–10.50** **How are leading investors integrating ESG into their mainstream portfolios?**  
*Moderator – Angela de Wolff, managing partner, ConSer Invest*
- *Equities and bonds – Martijn Huijnen, portfolio manager socially responsible investing, SPF Beheer, Netherlands*
  - *Alternatives and property – Marcel Jeucken, head of responsible investment, PGGM Investments, Netherlands*
- 10.50–11.10** **Coffee**
- 11.10–11.50** **The future of ESG data/information. If it's to be integrated, how is it going to be delivered?**  
*Moderator – Peter Kraneveld, international pensions advisor, Prime BV, Netherlands*
- *Going direct. How investors are ensuring they get the ESG information they require from companies – a landmark Norwegian initiative – Jeanett Bergan, head of responsible investments, KLP, Norway.*
  - *Why ESG data will become as ubiquitous as financial data and delivered the same way – ASSET4 – speaker TBC*
- 11.50–12.30** **The great debate: Is ESG integration truly achievable or a legally uncertain concept with no place in investment?**
- *Paul Haines, head of investments, Daily Mail General Trust, UK*
  - *Kris Douma, head of responsible investment support and active ownership, Mn Services, Netherlands*
- 12.30–13.30** **Lunch**
- 13:30–14.00** **Keynote Address:** Darren Check, SBTK, USA
- 14.00–14.50** **VBDO Workshop on Responsible Investment for Institutional Investors**  
*Speakers – TBC*
- *Exclusions*
  - *ESG criteria when selecting shares*
  - *Engagement*
  - *Voting policy*
  - *Sustainable project financing.*
  - *Discussion of international similarities and differences with respect to RI policy and implementation*
  - *Q&A & Conclusion*
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- 14.50–15.20** **How to incorporate ESG criteria into stock selection and fund manager RFPs**  
*Moderator – Alfred Kool, Managing Partner, Kool Baas & De Quelerij*  
● **Jeremy Willems**, director of SRI investments, Fonds de Réserve pour les Retraites (FRR), France  
● **Eric Gelfren**, European head of responsible investing, Mercer
- 15.20–15.40** **Coffee**
- 15.40–16.10** **The ESG passive investment conundrum**  
*Moderator – TBC*  
● *Are investors integrating ESG criteria into their passive/index holdings? If not, why? – Pension fund speaker – TBC*  
● *Are today's index benchmarks good enough for investors truly seeking to integrate ESG into investment? – Index speaker – TBC*
- 16.10–16.50** **How serious are asset managers about integrating ESG issues into their investment and what are they doing?**  
*Moderator – Hugh Wheelan, Editor, Responsible Investor*  
● **George Möller**, CEO, Robeco  
● **Rory Sullivan**, head of responsible investment, Insight Investment
- 16.50–17.30** **Big-picture thinking**  
● *ESG integration, why a generational shift could bring it to the fore, a view from the US – Toni E Symonds, Chief Consultant, California State Assembly Committee on Jobs, Economic Development, and the Economy, USA*  
● *Initiating an ESG policy based on international norms (OECD/ILO) – Christian Ragnartz, chief investment analyst, AP7, Sweden – TBC*

## TBLI Conference™ Europe 2008

Responsible Investor and TBLI have partnered to co-promote our two events, which can be booked either individually or together at a discount – see Page 4 for booking information. Triple Bottom Line Investing Conference is the world's largest international learning and networking event dealing with sustainable investment. During this two-day event, the latest developments on screening, auditing, reporting, SRI analysis, corporate citizenship, indexes and research will be covered. Anyone involved in the financial sector should attend – see <http://tbliconference.com> for further information.

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## RESERVATION FORM

Responsible Investor and TBLI CONFERENCE™ have partnered to co-promote our two events which can be booked either individually or together at a discount. Please complete and return (by fax or email) the form below. You will be invoiced by TBLI CONFERENCE™ on receipt of the form.\*

For more information about the seminar program, please contact Tony Hay,  
 T +44 (0)20 8682 3638, M +44 (0)7887 683025, E tony@responsible-investor.com

Complete and return by FAX: +31 (0)20 428 6753 EMAIL to [esg@tbli.org](mailto:esg@tbli.org)\*

Please place a ✓ in one box (left column) to indicate your preferred option  
 NB: all prices exclude Netherlands VAT at 19%

	Integrating ESG 12 Nov	TBLI Europe 13 Nov	TBLI Europe 14 Nov	Grand Dinner 13 Nov
<input type="checkbox"/> €500.00	✓			
<input type="checkbox"/> €1,605.50	✓	✓	✓	✓
<input type="checkbox"/> €1,470.50	✓	✓	✓	
<input type="checkbox"/> € 1,290.50	✓	✓		✓
<input type="checkbox"/> € 1,155.50	✓	✓		
<input type="checkbox"/> €1,290.50	✓		✓	✓
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<input type="checkbox"/> €650.00	✓			✓
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<input type="checkbox"/> €895.00		✓		
<input type="checkbox"/> €1,045.00			✓	✓
<input type="checkbox"/> €895.00			✓	
<input type="checkbox"/> €150.00				✓

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\* Must be received 10 November latest. Cancellation fee of 10% in case of cancellation after 5 November.

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