




SPHERE  
ESG

# CHALLENGES ESG INTEGRATION

27 NOV 2019

08H-14H

BAUR AU LAC,  
ZÜRICH



WITH  
THE  
EXCEPTIONAL  
PRESENCE OF SOREN  
HERMANSEN, «AN  
ENVIRONMENT HERO»  
ACCORDING TO TIME  
MAGAZINE

With the partnership of

BMO  Global Asset Management



Swisscanto  
Invest

by Zürcher Kantonalbank

08:00 Welcome coffee

08:30 **Active shareholding and sustainable investments: opportunities and limits**

**Vincent Kaufmann**, CEO, Ethos Foundation

*Vincent Kaufmann (1980) has been the CEO of Ethos Foundation and of Ethos Services since June 2015. Vincent Kaufmann joined Ethos in 2004 as a corporate governance analyst, later becoming a senior and deputy head of corporate governance.*

*Vincent Kaufmann is also a member of the Board of Directors of Swiss Sustainable Finance since June 2019. Vincent Kaufmann, a Swiss certified Expert for Accounting and Controlling since 2009, holds a Master's degree in Business Economics from the University of Geneva (2004).*



**About Ethos:**

*Ethos, Swiss Foundation for Sustainable Development, is composed of 226 Swiss pension funds and public utility foundations. Ethos was founded in 1997 and aims at promoting socially responsible investment (SRI) as well as a stable and prosperous socio-economic environment that safeguards the interests of civil society today and in the future. To achieve its objectives, Ethos created the company Ethos Services, specialised in the field of socially responsible investment (SRI) and mainly focuses on institutional investors.*

09:00 **PANEL: Challenges of ESG integration into portfolios**

- From the perspective of the investor: how to define the added value? how to benchmark? how to select an above average provider? how to avoid a value destroying provider?

- From the perspective of the provider: Does an approach need to be unique (generating alpha)? does an approach need to be integrative? how to communicate properly (not a marketing gimmick, if it is not...)

Moderator: **Patrick Oberhaensli**, Founder and CEO, EVOLIDS FINANCE LLC

09:40 **PANEL: The challenges of sustainable investment for private investors. What are the alternatives?**

**How do investment funds respond?**

**Hervé Croset**, CEO, Wealth Solutions Partners SA

**Rochus Appert**, Director, BMO Global Asset Management (Swiss) GmbH

10:00 Coffee break

10:30 **What ESG related data are available today?**

**Bertrand Gacon**, Co-Founder and CEO, Impaakt



*Bertrand began his professional career with the BNP Paribas group. In 2006, Bertrand created the Responsible Investment offer of the French bank and developed a complete range of SRI and Impact Investing solutions for private clients worldwide. In 2011, he joined Lombard Odier and became head of the Impact Office, a team that developed innovative investment solutions in the field of development finance and climate obligations. He also initiated and led the B Corp certification obtained by Lombard Odier.*

*In 2018, Bertrand co-founded the social enterprise #mpaakt®, which uses collective intelligence to analyze and measure the impact that large companies have on the planet and society. The platform (www.mpaakt.com) allows all citizens to both contribute and benefit from this universal knowledge database built around the United Nations Sustainable Development Goals (SDGs).*

*In addition to his role as CEO at Impaakt, Bertrand is Program Director at IHEID, where he developed a Certificate of Advanced Studies on «SDG Investing». He is also leading the «SwiSOx» project at Sustainable Finance Geneva, an initiative whose objective is to create in Geneva the «iNasdaq for social enterprises». Bertrand is a graduate of Skema Business School.*

## 11:00 Mainstreaming ESG by law: understanding and adapting to regulatory drivers

**René Nicolodi**, Head of Equities & Themes, Swisscanto Invest by Zürcher Kantonalbank

*René Nicolodi is the Head of Equities & Themes Department within the asset management organisation at Zürcher Kantonalbank and Deputy Head of Asset Management. He started his career at Swiss Bank Corporation and UBS and held several investment banking and asset management positions at Zürcher Kantonalbank prior to his current roles. René holds a Ph.D. from the University of Zurich and is a Chartered Alternative Investment Analyst (CAIA).*

*Outside his roles at ZKB, René is a lecturer at the University of Zurich, the Swiss Training Centre for Investment Professionals (AZEK) and the International Management Institute (IMI-Kiev). René represents the Swiss Financial Analysts Association in the ESG Commission of the European Federation of Financial Analysts Societies (EFFAS) and is on the Advisory Board of the Centre for Corporate Responsibility at the University of Zurich. Since 2018 he is a Member of the Board of Swiss Sustainable Finance (SSF).*



## 11:30 Climate change: what are the investors' risks and how to adapt portfolios accordingly?

**Marie Owens Thomsen**, Global Head of Investment Intelligence, Indosuez Wealth Management

*A veteran economist and strategist, Marie Owens Thomsen is Group Chief Economist at Indosuez Wealth Management. An expert in international economics and finance, Marie Owens Thomsen was Chief Economist and Strategist for major international banking groups such as HSBC and Merrill Lynch, in London and Paris respectively, for over 20 years. She also has broad experience outside the financial sector, notably with IKEA, and, for approximately ten years, at the helm of her own company specialised in equipment for horses and riders. Marie joined Indosuez Wealth Management in 2011. Marie Owens Thomsen holds an MBA from the University of Gothenburg in Sweden as well as a Ph.D. in International Economics from the Graduate Institute of International and Development Studies in Geneva, Switzerland (GIIIS).*



## 12:00 Who are the big players in ESG today? who is doing what?

**Hannes Mac Nully**, Decarbonisation expert



*Hannes Mac Nully is an independent decarbonisation expert and also works as a senior international energy efficiency consultant for the UN Industrial Development Organisation. His specific focus is on bridging the communication gap between policymakers and industry on the topic of decarbonisation, examples of which include his initiation of the UN Industry Working Group and Policy Maker meets the Engineer programme. A mechanical engineer by qualification, Hannes has over 17 years of experience working within the industry, government and NGO sectors.*

## 12:20 How to create community power and generate change

**KEYNOTE SPEAKER// Søren Hermansen**,  
Director, Samsø Energy Academy

*Søren Hermansen is the CEO and Founder of the Samsø Energy Academy, a NGO working with the consequences of climate changes, mostly focusing on green energy transition and community involvement.*

*Søren has more than 20 years experiences with working with community change and sustainability development. He was the initiator and leader of the green transition of his island, Samsø, which became carbon and energy positive in seven years, between 1997 and 2005, the Energy Academy and Søren are working towards making Samsø fossil free and circular by 2030.*

*He is Adjunct Professor at Aalborg University, a Honary Doctor at the University of TU Delft, and furthermore he was given the Göteborg Award (the "Green Nobel Prize") and Danish Svend Auken award.*



12:40 Cocktail lunch

14:00 End of the event