



**“How to get value out of SRI?”  
A Management & Transparency for Competitiveness Webinar  
30<sup>th</sup> April 2015 (15:00 CEST)**

Socially Responsible Investments (SRI) are gaining momentum in Europe as the European investment industry has started to realize the importance of taking into account non-financial performance when making investment decisions. This is demonstrated in the latest Eurosif study in which the figures in all SRI strategies have continued to grow at double-digit rates since 2011 (11% in all SRI engagement strategies combined).

On this same note, many large companies receive long questionnaires from SRI / ESG rating agencies, which takes considerable effort and resources to fill in and have approved. Many companies are asking whether this is worth the effort, and what strategies to build to really get value out of SRI and the growing investor universe?

**Join this webinar to:**

- ✓ LEARN about how other companies approach ESG rating agency questionnaires
- ✓ FIND OUT what practical strategies exist for engaging investors and getting value out of SRI

TIME	AGENDA	SPEAKER
15.00 – 15.05	Welcome	Aron Horvath, Project Manager CSR Europe
15:05 – 15:20	Proactive engagement is key to yield successful SRI investor relationship strategies	Mike Tyrell, owner SRI-CONNECT
15:20 –15:35	The world beyond rating agency questionnaires from a sell-side perspective	Carole Crozat, CFA Senior SRI Analyst MARK/GRS/SEC
15:35 – 15:50	Case Study: combined ESG ratings as target for CSR performance	Toni Ballabriga Global Head of Corporate Responsibility & Brand, BBVA
15:50 – 16:05	The all new Management and Transparency for Competitiveness program of CSR Europe	Aron Horvath, Project Manager CSR Europe
16:05 – 16:20	Discussion and Conclusion Q & A	Moderated by CSR Europe

## SPEAKER BIOGRAPHIES



**Carole Crozat**

**SRI Analyst, Société Générale**

Carole joined Société Générale Cross Asset SRI Research in 2011, and has been particularly active in research fields including pharmaceuticals, nutrition, food safety, and supply-chain issues (textile, ICT hardware). Before joining SG, Carole spent four years as an SRI analyst at Allianz Global Investors France. In particular, during this period, Carole was in charge of SRI financial analysis including keeping rating methodologies up to date, taking an active role in market initiatives (Enhanced Analytics Initiative, PRI, Global Compact, GRI, etc.) and coordinating commitments with companies and other relevant parties. Before that, for two years, she worked as an SRI analyst at the TMT division of Vigeo in Paris where she was also in charge of R&D for rating methodologies relative to corporate governance. Carole graduated from HEC and is a CFA Charterholder.



**Antoni Ballabriga**

**Global Head of Corporate Responsibility & Reputation, BBVA**

Antoni reports to the CEO and Board of Directors in this matter. He is the Secretary of the Responsible Business Committee. His main responsibility is to get the full engagement of all lines of business and support areas to make “Responsible Banking” and to safeguard BBVA reputation. This means the integration of “people centric mindset” into business model and includes issues as transparent & clear communication, financial literacy, high impact products & services, employee socially engaged and community involvement programs. CEO of Momentum Social Investment, an impact investment fund lead by BBVA to help social businesses to grow. Former President of SpainSIF, Spanish Forum for Socially Responsible Investment. He holds a Degree in Business Sciences and Master in Business Administration from ESADE Business School. He has studied strategy and CSR at Harvard Business School.



**Mike Tyrrell**

**Editor of SRI-CONNECT**

Mike has been a sustainable investment analyst for the past 18 years initially at Jupiter Asset Management and then at HSBC Global Equities where he established the first SRI research capacity on the ‘sell-side’ and, most recently, at Citi Investment Research. He launched [www.sri-connect.com](http://www.sri-connect.com) in 2011 to facilitate the flow of information, analysis and ideas between companies, research providers and investors. The site is an online global marketplace for SRI & corporate governance research and a meeting point for companies, investors and their respective advisors. It provides practical research resources and communications channels to accelerate the inclusion of sustainability and corporate governance factors in 'mainstream' analysis & investment. It is free to join but membership is strictly limited to institutional investors, quoted companies and their respective advisors.