

# Adopting effective ESG Disclosure practices

A training course by  
**Academy**

27 and 28 September 2022



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# Academy

At Academy we aim at sharing **capital markets expertise** by turning it into world-class training courses and programmes.

Our programmes reflect the evolution and trends of **financial markets and their eco-systems**.

Key assets of our learning centre are our centrality in capital markets, and our **internal and external faculty**, whose contributors are drawn from practitioners, academics, advisors and financial market specialists.

As an Exchange system, being at the centre of financial markets, we understand not just what happens now, but also what's changing - so we can design our courses to equip you for the world of today and tomorrow.

## An accredited Management System Certificate

Academy meets the management system standards UNI EN ISO 9001:2015, sector EA:37 since 2007.

The accreditation guarantees internationally recognised quality service standards and allows companies to apply for public funding to finance individual and company training projects.





# Programme overview, take-aways and target

## Overview

The programme is designed to finally enable the implementation of **“Effective ESG disclosure frameworks”** in order to open access to international capital flows from different types of investments, including SRIs.

Within this context, this hands-on learning programme, not only can provide an **in-depth analysis of the current ESG regulatory frameworks**, but it particularly encourages group works and knowledge and experience sharing among course participants, starting from a benchmarking analysis of effective ESG disclosures.

## Take-Aways

In addition to the in-depth updates on Regulation and Disclosure practice, Industry best practices and trends, such as sustainability, there are several key outcomes that can be expected from this course:

- Learn how to develop focused ESG disclosure practices against industry standards,
- Understand the industry changes and learn what the likely changes will mean for you,
- Learn what investors, including Responsible Investors, expect from you and how best to engage with them,
- Understand and deep dive on ESG reporting and disclosures (including the EU Directive 2014/95/EU on non-financial reporting, EU Guidelines on reporting climate-related information, Sustainable Development Goals (SDGs) and Task Force on Climate-related Financial Disclosures).

## Target Audience

This training programme is addressed to:

- IR professionals
- Sustainability and ESG managers
- Board directors
- Communication and PR Managers of listed and listing companies
- ESG advisers
- Financial analysts

## Faculty

**Ghislain Boyer** – ESG and Sustainability advisor - **Euronext Corporate Services**



**Sara Lovisolo** – Head of Group ESG - **Euronext Group**

**Ulrike Heindl** - Business Development and Marketing Director -  
**Tennaxia**

**Solène Garcin-Charcosset** – CSR Business Line Director – **Tennaxia**

**Anna Dumanska** - Senior Investor Relations Officer - **Shell**

## **E-Learning Tools**

The virtual classroom will be held on line on the Zoom platform. Participants will be invited to run a check test on the tool, together with the course tutors, a couple of days before the beginning of the training.

The **handouts** and **course material** will be provided to the delegates in pdf format will be released on the e learning platform after each session.

# Agenda

## 27 September 2022

### ESG frameworks and regulation

**9.20** *Welcome and introduction to the course*

#### **9.30 Overview of the ESG eco-system**

- ESG investment diversity
- Key market players: who is driving ESG investments
- A focus on responsible and impact investing: a closer look at the buy-side

#### **ESG shareholders' knowledge and outreach**

- Knowing your shareholders
- ESG investors influence and attraction
- Knowing your stakeholders
- How to get in touch and work with your stakeholders

**Ghislain Boyer** - *ESG and Sustainability advisor* - **Euronext Corporate Services**

#### **10.45 Coffee Break**

#### **11.00 Understanding EU Taxonomy**

- Environmental Objectives and Technical Screening Criteria
- TEG Technical Advice and Use cases

**Sara Lovisolo** - *Head of Group ESG* - **Euronext Group**

#### **12.15 Discussion zone**

**12.30/45** Close day 1

## 28 September 2022

### Non-Financial Reporting and ESG Disclosures

**9.30 From NFRD to CSRD: the evolution of the regulatory framework**

**Sara Lovisolo** - *Head of Group ESG* - **Euronext Group**

#### **10.30 Non-financial reporting**

- What is non-financial reporting
- Risk and materiality analysis
- Data collection
- CR report drafting: international Frameworks

**Ulrike Heindl** - *Business Development and Marketing Director* - **Tennaxia**

**Solène Garcin-Charcosset** - *CSR Business Line Director* - **Tennaxia**

#### **11.30 Coffee Break**

#### **11.45 Drafting a CR Report: the IR perspective and role**

- Engaging with responsible investors
- Liaising with internal stakeholders in the process
- **Use Case: the Shell experience**

12.15 - **Group works and discussion zone**

**Anna Dumanska**  
Senior Investor Relations Officer  
**Shell**

**13.00 - Course summary, wrap up and close**

# Terms and conditions

The registration form is a legally binding agreement between BIt Market Services and the applicant (or the company the applicant works for) and is defined by the following conditions:

## Virtual classroom schedule

27 and 28 September 2022

## Registration

The applicant can submit the registration form, duly filled out, to Academy 7 days prior to the course date via:

- **EMAIL** [academy@euronext.com](mailto:academy@euronext.com)
- **WEB** [Academy website](#)

To register after this date, please contact the following phone number:

- **TEL +39 02 72426 086**

Participation will be confirmed in writing by the Academy administration.

## Registration fee

The individual registration fee to the course is € 800 + 22% VAT.

The fee includes the course materials in pdf format.

## Discounts

**Early bird:** 10% discount for registrations by 29 July 2022.

**Multiple registrations** - Discounts are available for multiple registrations of the same company. In particular:

- Two participants: 10% discount on the total amount
- Three participants: 15% discount on the total amount
- NEVIR Members: 20% discount on the total amount

## Payment method

Fees must be paid:

- Upon receipt of the email from Academy confirming the applicant's registration (sent approximately 7 days prior to the course date)

or

- Upon receipt of the invoice from BIt Market Services S.p.A. (Academy is part of the BIt Market Services Company)

Payment must be made via **BANK TRANSFER** to:

**BIT MARKET SERVICES S.p.A.**

P.zza degli Affari, 6

20123 Milano

**Tax code** 06695270964

**VAT number** 10977060960

**Deutsche Bank S.p.A.**

**Filiale via San Prospero, 2**

**20121 Milano**

**codice IBAN:**

**IT 22 B 03104 01600 000000 770114**

**SWIFT address DEUTITMMIL**

Copy of the effected bank transfer must be emailed to Academy [academy@euronext.com](mailto:academy@euronext.com).

Invoice marked as paid will mailed to the addresses indicated on the wire transfer.

## Intellectual property rights

The Client acknowledges and agrees that the contents made available during the training (including, but not limited to, videos, pictures and texts) are property of BIt Market Services or are supplied by BIt Market Services in virtue of certain contractual arrangements with third parties and cannot be reproduced, distributed or used for business purposes without the prior written consent of BIt Market Services or the entity having the relevant rights on the same.



## Liability

Whilst every effort is made by BIt Market Services to ensure that the contents of the training (including, but not limited to, videos, pictures and texts) are accurate and up to date, BIt Market Services shall not be liable whatsoever for any inaccuracy or misleading information, nor for any consequential damage or expense or any loss of profit or any liability to third parties incurred as a result of reliance on such information, which is provided for educational purpose only. BIt Market Services total liability under this agreement shall be limited to the maximum amount represented by the Fees paid to the latter by the Client.

## Traceability of financial flows

BIt Market Services and the Client assume all obligations regarding the traceability of the financial flows provided by Law 136/2010, as subsequently amended and implemented (the "Traceability Obligations").

In relation to the payments to be made pursuant to the present Contract, the Client, if it is a public contractor pursuant to decree law 163/2006 (Code of public contracts for works, services and supplies), to ensure the enforcement of Law 136/2010 and subsequent amendments, undertakes to communicate to BIt Market Services, by the form attached to the Contract, the identification bidding code (CIG) and, in case, the unique code of project (CUP).

In particular, in fulfilling the Traceability Obligations, BIt Market Services will communicate to the Client:

- (i) the bank accounts details to be used, also nonexclusively, for the payments to be made by the Client pursuant to the present Contract;
- (ii) the personal details and the fiscal code of the persons delegated to operate on them, indicating the relevant role and powers, within 7 (seven) days from the creation of the accounts above (or, in case of existing accounts, within 7 (seven) days from their first use in relation to the payments made by the Client).
- (iii) Any possible amendment of the information indicated in points (i) and (ii) above, will have to be communicated by the Client within 7 (seven) days from occurrence.

Let it be understood that, save for possible derogations and partial exemptions to Law 136/2010, failure to use

instruments suitable to permit the full traceability of the financial flows (for instance, bank or post transfer) and the failure to comply with any other Traceability Obligations, are ground to terminate the present Contract.

BIt Market Services undertakes, in particular, to inform the Client and the Prefecture (territorial office of the Government of the province where the Client has its registered office) if it becomes aware of breaches by its contractual counterparties, if any, in relation to the Traceability Obligations.

## Cancellation Policy

According to article 1373 C.C., to withdraw from this contract applicants must send a written notice via email to [academy@euronext.com](mailto:academy@euronext.com):

- The fee will be fully refundable up to 7 working days prior to course date.
- A 50% refund will be provided for cancellations made during the 6 days leading to the course,
- Fees are non refundable for cancellations made 1 day prior to the course date.

Substitution of attendee (from the same company) may be made at any time.

Academy accepts requests to replace the course with another Academy course. The rescheduled training must take place within 12 months.

## Changes to the program

BIt Market Services reserves the right to postpone or cancel the course and notify the participant via fax or email at least 1 week before the course date; in this case, the participant is entitled only to a full refund of the course fee. In addition, BIt Market Services is entitled to make changes to the programme and seat of the training and/or substitute the expected panellists with others with equal skills and competence.

## Governing law and jurisdiction

The present agreement shall be governed by Italian law. The parties assign to the Court of Milan the exclusive jurisdiction over any dispute arising out the present agreement, this including – but not limited to – any proceedings regarding the validity, the construction, the performance and/ or the termination of the agreement.

# Booking form

Please read the terms and conditions on the preceding page.

Fill out the form and send email to [academy@euronext.com](mailto:academy@euronext.com).

For further information +39 02 72426086 – [academy@euronext.com](mailto:academy@euronext.com)

## Adopting effective ESG Disclosure Practices

Virtual Classroom – 27 and 28 September 2022

### COURSE FEE

Individual		<input type="checkbox"/> € 800 + VAT (if applicable)
2 participants	<b>10% discount</b>	<input type="checkbox"/> € 1,440 + VAT (if applicable)
3 participants	<b>15% discount</b>	<input type="checkbox"/> € 2,040 + VAT (if applicable)
Early bird by 29 July	<b>10% discount</b>	<input type="checkbox"/> € 720 + VAT (if applicable)
NEVIR members	<b>20% discount</b>	<input type="checkbox"/> € 640 + VAT (if applicable)

### PARTICIPANT INFORMATION

Name and Surname

Jop title

Company

Email

Phone

Job Field			Knowledge level of the subject
<input type="checkbox"/> General Management	<input type="checkbox"/> ICT	<input type="checkbox"/> Tax	<input type="checkbox"/> Basic
<input type="checkbox"/> HR, Organisation and Development	<input type="checkbox"/> Legal	<input type="checkbox"/> Finance	<input type="checkbox"/> Intermediate
<input type="checkbox"/> Administration and Control	<input type="checkbox"/> R&D	<input type="checkbox"/> Risk Management	<input type="checkbox"/> Advanced

#### Nature of business

<input type="checkbox"/> Listed/unlisted company	<input type="checkbox"/> Bank	<input type="checkbox"/> Advisory	<input type="checkbox"/> Energy
<input type="checkbox"/> Lawyer	<input type="checkbox"/> Investment Bank	<input type="checkbox"/> Private Equity	<input type="checkbox"/> Funds

#### Company Address

Street N. Zip code City Country

## BILLING INFORMATION

The invoice must be addressed to:

Company name/Participant name and surname

VAT number

Department

Billing reference name

Street

N.

Zip code

City

Country

Phone

Email

## ELECTRONIC INVOICE (IF APPLICABLE)

According to the Italian Law no. 205 of 27.12.2017 and to Provision no. 89757 of 30.4.2018 of the Italian TAX Authority and subsequent amendment and/or integrations, the Client duly holder of an Italian VAT code/Tax identification code) provides with:

Certified Email Address (PEC):

Or Recipient Code:

In order to receive the electronic invoice through the Italian Exchange System (SDI) according to the above information

Phone

Email

## SPLIT PAYMENT (IF APPLICABLE)

According to the art. 17-ter of the Italian D.P.R. no. 633/72 (as subsequently amended and implemented), the Client (duly holder of an Italian VAT code/Tax identification code) declares that:

is subject to the "Split Payment" VAT regime  is not subject to the "Split Payment" VAT regime

and undertakes to communicate any change of such regime.

## PRIVACY

By signing this booking form I declare that I have read the informative document regarding the processing of personal data on the Bit Market Services S.p.A.'s website (<http://www.borsaitaliana.it/varie/privacy-bims/privacy-bims.en.htm>) and I accept the General Terms and Conditions of the service.

In addition to the declaration above, by ticking the relevant box I also inform that (*please tick the chosen box*):

I DO

I DO NOT

authorize Bit Market Services S.p.A. to gather and to process my personal data for the purpose of "direct marketing", by sending advertising material, direct sales and promotion of products and services of Bit Market Services S.p.A., carrying out market research, marketing communications, also using data subject's name for publicity carried out through automated means of contact such as e-mail, fax messages, mms or sms.

I DO

I DO NOT

authorize the communication/the transfer of the personal data for the purposes of direct marketing by third parties - even outside the European Community - included the other companies of the Euronext Group, as well as third parties referred to in point c) of the informative document regarding the processing of personal data (<http://www.borsaitaliana.it/varie/privacy-bims/privacy-bims.en.htm>).

**Signature and company seal**

**Date:**

## Academy

Comprehensive, quality education is fundamental for the development and growth of the economy. As part of a leading pan-European market infrastructure at the centre of European capital markets, Academy's main objective and activity is turning capital markets expertise into world-class training courses and programmes and making them relevant to the wider financial community of today and of tomorrow. Key Academy assets are our centrality in capital markets, and our internal and external faculty, made up of practitioners, academics, advisors and financial market specialists. Interactive and innovative learning methods make all Academy programmes an inspiring experience.

## CONTACTS

academy@euronext.com  
+39 02 72426 086



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