What's on in 2020?
Member guide to our projects and plans and your ways to benefit

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Events 2020

23 April, Edinburgh Analyst Conference

May, Ownership Day

Summer, AGM and Summer Drinks

24 - 30 October, Good Money Week

Nov/Dec, London Conference
I’m delighted to welcome you to What’s On in 2020 covering UKSIF’s plans for year ahead so far - and as members will realise, it is no ordinary year.

Any observer will see that public interest and consumer choices have shifted decisively towards “sustainability”. A change was obvious in our opinion polling for Good Money Week which showed more people want to use money for impact, and this echoed growing activism and supportive media interest. Perhaps for the first time this mood was matched in politics with climate in particular evident in public commitments from all the leading parties in the election campaign, even if (subjectively) I don’t think the issue cut through in the election coverage.

So what are we going to do, and how are we going to work with others to deliver? Well, “keep it simple stupid” is a good slogan. Wherever possible, everything we do this year will have a COP angle to it. So Good Money Week and Ownership Day are being planned with that in mind and COP-links will be in the brief for all speakers at the conferences and other events.

We are committed to working with others on COP and are already talking to other parties to make sure the sector in the round gets it right. We are committed to this and will stick with it: I say that because I think it’s inevitable COP will be mocked as it gains momentum. Private Eye will run COP-balls just as it has run Brexit balls and election-balls. We will ignore it!

Our work in past years in pensions, aimed at growing sustainable investing in that space for the benefit of members and the planet, is delivering in regulation. We have just published a review of the impact of the recent changes- which shows that only a few schemes are doing well. We will continue to work in this area. Policy is a fertile area and work underway there will help members in banking, insurance and advisory services.

Also exciting for us this year will be what we are calling in the office Global Good Money Week. We are co-operating with the Australian and Canadian SIFs on a climate emergency focused week, and in addition to a full range of UK relevant content we hope to do global opinion polling to identify the differences in public attitudes around the world. We hope this will be useful for our adviser members.

I wish you luck with your 2020 plans, Simon Howard
Chief Executive, UKSIF
Campaigns
We inform, influence and connect investors to help grow demand for sustainable, responsible and ethical finance and investment.

Good Money Week is our national retail audience campaign to raise awareness of sustainable, responsible and ethical investment and finance.

We produce educational content and attempt to flood mainstream and industry media during the Week to focus attention on the link between our everyday financial decisions and their impact on society and the environment.

Good Money Week 2020 will reach Australian and Canadian retail audiences thanks to collaboration with RIAA and RIA Canada.

Together we will focus on the climate crisis and a just transition as we attempt to ensure everyone knows they have sustainable and ethical options when it comes to their banking, pensions, savings and investments.

The mission is even more critical given the force of the recent Australian bush fires and carbon emissions continuing to rise at a rate that will ensure we fail to achieve a 1.5 degrees future. Good Money Week will highlight means for action ahead of COP26, Glasgow, held just over a week later.

Do you have products and services that may help increase retail investors’ financial resilience against carbon risk?

Any that help make it easier for them to finance a just transition?

Would you like to promote these products and services as a sponsor of Good Money Week, the first one to go global?
Member benefits - A retail marketing opportunity

• Use the Week to grow demand for your responsible and sustainable retail products and services.

• Capture public interest by publishing a piece of research, launching a new service or sharing new content during the Week which we can help promote.

• Provide your examples of positive impact (including financial) for the GMW website.

• Engage with Good Money Week supporters by following us and commenting on Twitter, Facebook and Instagram.

• Attend events we feature on the Good Money Week website.

You can also sponsor the 2020 campaign

Last year’s #MentionthePension campaign sponsored by Aberdeen Standard Investments achieved 282 pieces of media coverage (15% national and 85% across all UK regionals) including TV and radio. We can do something really special that’s global with many more of you supporting. Will you join our list of GMW supporters in 2020?

Benefits this year will include your brand featured across our digital platforms and content, on our public opinion survey, access to our media team and much more including profile at in-person events for financial advisers and individual investors.

Contact Charlene Cranny with an expression of interest.

Policy

Shape industry governance by informing, influencing and connecting with policy makers and regulators.

After a tumultuous year in British politics, we may finally have entered a period of stability, with a large majority government for the first time in four years. Climate change featured heavily in the December 2019 election, and looks set to stay on the agenda in the run up to COP 26, the UN climate change summit which will take place in Glasgow in November. Green finance looks set to be a key part of the UK’s government’s approach to the conference, with the government set to champion the UK as a leading centre of sustainable and responsible finance.

Climate change & green finance

In the run-up to COP 26 the UK government will seek to get its house in order not least by appointing a president! Currently the UK is set to miss its carbon reduction targets for 2023-27 and 2028-32, and ministers will seek to close that gap with new policies to reduce emissions in transport, energy, agriculture and buildings. The re-elected government appears keen to continue its predecessor’s work on green finance. In 2019 Theresa May’s government published a Green Finance Strategy, which set out various commitments and areas of work. For example, in 2020 the government and FCA will start to explore how to encourage UK listed companies to disclose in line with TCFD. We also expect announcements on TCFD for large asset owners.

The Bank of England has a new governor, who we hope will continue its work on climate-related financial risk established by Mark Carney. The Bank will prepare for a stress test of UK banks and insurers in 2020, and is consulting now on how it should test whether UK firms are able to withstand climate-related financial impacts.
Pensions set for further reforms

After changes to trust-based pension schemes regulation that require schemes to develop a policy on financially material ESG risks, including climate change, the government is likely to continue to look for ways to harness the power of pension funds in the fight against climate change. In 2019, the government committed to explore ways to encourage ‘large asset owners’ to report in line with TCFD recommendations, and the Pensions Minister will be taking a Pensions Bill through Parliament, during which it is likely that MPs will debate whether the law needs to change to improve the way schemes manage the financial risks of climate change. UKSIF has just reviewed DC trust-based schemes. You can find it on our website. 2020 is also the year that new FCA rules governing contract-based pension schemes come into force requiring schemes to develop ESG policies.

Brexit & the EU Action Plan on Sustainable Finance

Although the UK is set to leave the EU on 31st January, we should not expect anything to change over night. While the UK will technically cease to be a member, it will enter a limbo transition period when nothing changes while the UK and EU negotiate the details of a future relationship. This will determine the fate of EU environmental and climate change rules in the UK – which comprise fully one third of the EU law which applies in the UK – but also the future status of new EU financial services rules, such as those contained in the EU’s Action Plan.

A new regulation requiring firms to disclose the environmental impacts of investment decisions, requiring advisers to seek clients’ preferences on ESG factors, and the legal basis of the EU’s taxonomy will all come into force in law after the end of this year, and thus not apply in the UK. But that is not the end of the story – the UK government has promised to ‘match the ambition’ of the EU Action Plan in the UK, which could mean 2020 is the year the UK develops its own version of the EU’s Action Plan.

Member benefits

UKSIF seeks to influence and inform. We are always keen to hear members’ views so that we can better represent you. We also seek to keep you informed of all the developments you need to know about – we are particularly excited about our forthcoming new website which will provide members with a new library of policy briefings.

• In 2020 you can shape and stay informed of policy and regulation:
• Contribute to our policy consultation responses
• Receive news of policy reports and decisions that impact your business
• Attend policy discussions at our events with peers and policy makers

2019 Election Manifestos

Highlights for UKSIF members

Changing course?

How pensions are approaching climate change and ESG issues following recent UK reforms
Events

Attend a variety of educational and social events to learn from, inform, influence and connect with other leaders in our sector.

UKSIF’s programme of events for investment analysts, and those that work with them, catalyses debate on emerging environmental, social and governance (ESG) issues and assists our members to develop their practices.

Recent topics have included ESG integration techniques, quant investing and ESG, TCFD scenario analysis and measuring the impact of ‘SDG’ investments.

Edinburgh Analyst Conference

The Edinburgh Analyst Conference offers Scottish members an opportunity to discuss the latest issues facing sustainable investment and finance in the UK.

This year is special in that this event gives us an opportunity to discuss and ready ourselves for COP26 being held in Glasgow. Join us on 23 April 2020 for a day of learning, networking and planning for a successful COP.

London Analyst Conference

UKSIF’s third annual one-day conference in London will take place in Nov/Dec 2020. This is an opportunity for members to debate emerging ESG issues and share best practices of the latest processes relevant to analysts, investors and researchers.

Annual General Meeting

We hold an annual AGM to present on the successes of the year, as well as to elect directors and present the accounts to members so come along and hold us to account. The AGM will be held in the summer. We’ll keep you updated.

Member benefits

- Attend the conferences for free and take part in thematic, policy and industry discussion.
- Network with leaders in finance, policy, civil society and more.
- Promote your commitment to sustainable investment and finance to key audiences as a sponsor or host.
- Propose topics and practical workshops to learn from.
- Use as a source of learning for yourself and colleagues.
Sponsorship
Raise your profile as a sustainable and responsible business by sponsoring key events and campaigns. Some of the opportunities available in 2019 include:

**Who fund the world?**

Range: £2,500 – £10,000  
Audience: Women, retail, consumers  
Date: Ongoing  
Target women with investable assets looking to start their impact investment journeys.

**Edinburgh Analyst Conference**

Range: £3,500 Supporting – £7,000 Lead  
Audience: Member and non-member analysts and researchers  
Date: Mid-March 2019  
An event for analysts to discuss financially material ESG themes and integration techniques. Benefits include pre and post-event media and industry marketing.

**Ownership Day**

Range: TBC  
Audience: Asset owners  
Date: April 2019  
An event and media campaign encouraging asset owners to be active owners on urgent issues such as climate change.  
Ownershipday.co.uk

**Good Money Week**

Range: £8,000 Supporting – £25,000 Lead  
Audience: Mainstream consumers (primary), charities, faith groups, financial advisers and young people (secondary)  
Date: 24 - 30 October 2020  
Campaign to let people know they have sustainable and ethical options when it comes to their banks, pensions, savings and investment. 2020 will focus on climate and a just transition and will be held in partnership with the Canadian and Australian SIFs.  
goodmoneyweek.com

**London Analyst Conference**

Range: £3,500 Supporting – £10,000 Lead  
Audience: Member and non-member analysts and researchers  
Date: November 2019  
An event for analysts to discuss financially material ESG themes and integration techniques. Benefits include pre and post-event media and industry marketing.

**Bespoke content and campaigns**

Range: Any  
Audience: Any  
Date: For discussion  
We are very happy to work with members on bespoke projects to make the most of our communications and campaigns experience. We’ll suggest ideas for relevant and remarkable content and campaigns to help you capture the imagination of your chosen audience on your chosen issue (please note we do not promote specific products or services but SI/RI as a whole).
Industry news

Newsletter and Social Media

Our monthly newsletter shares relevant sector information and keeps you in the loop about the latest initiatives, events and updates from UKSIF. We use our social media channels to break news, share research, promote campaigns and the latest policy priorities.

• Sign up to our newsletter at info@uksif.org
• Submit your latest piece of work, case studies, news, jobs and events to info@uksif.org to share with the network
• Follow us on Twitter: @UKSIF / @UKSIFSimon / @UKSIFCharlene / @UKSIF_Ben / @goodmoneyweek
• Follow UKSIF on LinkedIn
• Follow Good Money Week on Twitter, Facebook and Instagram

Have your say

Shape UKSIF’s future

The feedback of our members is highly instrumental in shaping our organisational agenda. Below is a means of sharing your honest views about the membership, and airing any requests. There is no deadline for submission - we welcome your thoughts at any time. Simply fill out the below sections clearly, snap a photo of the completed form on your phone, and email the picture to info@uksif.org with the subject line ‘What’s On feedback’.

Tell us one thing that UKSIF should be doing but isn’t.

What are we doing that you wish we weren’t?

Email the picture to info@uksif.org with the subject line ‘What’s On feedback’.