

CCR ROUNDTABLE

INTERACTIVE WORKSHOP on

«Materiality at its best – strategic and integrated»

DATE & LOCATION:
25 MARCH AT
EY, MAAGPLATZ 1
8005 ZURICH

Our interactive workshop will focus on the topic of Materiality. The concept of materiality was first introduced by the US Stock Exchange Commission SEC in the 1930ies with a view to ensure that average investors get all the information they need from listed companies. During the last decade this concept has become the fashion in the sustainability/ESG world and has been widely used and applied.

Novartis' most **recent Materiality Assessment** has brought it to a **completely new level**: It is **thought to be a strategic tool** for senior management. As a consequence it includes the broad scope of all possible business issues and is designed to inform strategic decision making rather than just a basis for Reporting. **Denise Weger**, Corporate Responsibility Manager and responsible for strategic initiatives at Novartis, will present and **explain** the purpose and rationale for **their approach**, including the **use of scenario techniques**.

Justin D'Atri, Sustainability Change Manager at **Zurich Insurance**, will share their approach to materiality driven by big data analytics and artificial intelligence.

Becky Pearce, Investor Relations Director at **Unilever**, will present their learnings from the Embankment Project for Inclusive Capitalism (EPIC) and the steps that Unilever are taking to incorporate non-financial value drivers into strategy and the communication to investors.

Additionally, you will get an update about 'Integrated Thinking & Strategy' by **Jyoti Banerjee**, the leader of **IIRC's** corresponding special interest group where more than 40 international companies are currently actively engaged.

We plan for a structured discussion session on some of the hot topics with regards to materiality like definition, scope, ownership, internal embedding, repetition, disclosure and aim to share what we hear from capital market professionals.

AGENDA OF THE INTERACTIVE WORKSHOP

08.15	Arrival at EY / Welcome coffee
08.30 – 09.00	Welcome & Introduction <ul style="list-style-type: none">- Welcome by Thomas Scheiwiller, Chairman of the Advisory Board, Center for Corporate Reporting (CCR)- Introduction of all participants / Short input on workshop expectations
09.00 – 09.45	Materiality: operational burden or strategic opportunity – how to make the Materiality Assessment worth the effort Denise Weger, Corporate Responsibility Manager & Strategic Initiatives at Novartis
09.45 – 10.00	Data-driven Materiality: how emerging technologies like AI can enhance the speed and robustness of materiality assessment efforts Justin D'Atri, Sustainability Change Manager at Zurich Insurance Group
10.00 – 10.20	Coffee & Snacks
10.20 – 10.35	How Unilever incorporates non-financial value drivers into strategy and investor communication Becky Pearce, Investor Relations Director at Unilever
10.35 – 10.50	Integrated Thinking: Management Practice in an Era of Integrated Reporting. Jyoti Banerjee, partner at Fronesys, and Strategic Adviser, IIRC (International Integrated Reporting Council)
10.50 – 11.00	Wrap up by Mark Veser, EY, of key take-aways and learnings
11.00 – 12.00	Structured discussion facilitated by Thomas Scheiwiller, CCR
12.00 – 12.15	Closing: Participants share key take-aways from the workshop
12.15 – 13.15	Standing lunch & networking

Please note that the event is held under Chatham House rules.

Participants

We expect 10-15 participating companies – typically leaders in their industries – with no more than a total of 30 participants to allow for interactive discussion.

Cost (including workshop participation and documentation)

- CCR corporate members, category II & III: free
- CCR corporate members, category I: CHF 350
- Non-CCR corporate members: first participant CHF 750, each additional participant CHF 500

The CCR Roundtable in brief

Reporting is constantly evolving – requirements are increasing. Sustainability, transparency, stakeholder commitment and long-term orientation can no longer be achieved solely through communication. Instead, companies are faced with the challenge of making them an integral part of their business model and value creation process.

With this in mind, the Center for Corporate Reporting (CCR) initiated the CCR Roundtable (formerly Integrated Reporting Roundtable) in 2015. The CCR Roundtable promotes sharing of practical experiences, gathering insights from experts and disseminating learnings from peers.

About CCR

The Center for Corporate Reporting (CCR) is an independent center of excellence for corporate reporting and the central point of contact for all key players in the corporate reporting community. CCR's activities include the annual Symposium, topic-specific events, the trade publication "The Reporting Times" and exclusive services for corporate members.

We serve as your knowledge hub offering practical corporate reporting expertise and offer a unique, interdisciplinary network in corporate reporting.

Our corporate members include (extract):

AFG Management, Ascom, Bâloise, Clariant, Dufry, Geberit, Georg Fischer, Givaudan, Groupe Mutuel, HIAG, Hilti, Dormakaba, Liechtensteinische Landesbank, Lindt & Sprüngli, Lonza, Mikron, Raiffeisen, Roche, RUAG, Schindler, SGS, Siegfried Holding, Schmolz + Bickenbach, Suva, Swiss Prime Site, Swiss Re, Swisscom, Valora, Zurich and many more.

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