

EDM Webinar

CDO's ESG Data Management Masterclass – Building a Holistic ESG Data Strategy

A conversation with



Levent Ergin
Chief Strategist,
ESG
Sustainability,
Informatica



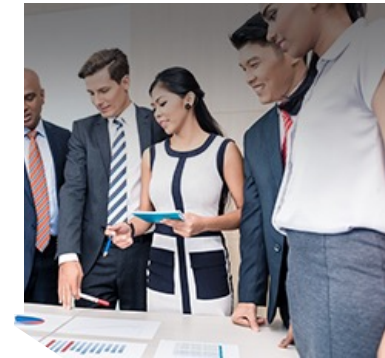
Peter Ku
Chief Strategist,
Financial
Services,
Informatica



Ryo Yoshiike
PMP,
Sustainability
Data Leader
Deloitte



Fawad A. Qureshi,
Field CTO,
Snowflake



Moderated by **Mike Meriton** Co-Founder, EDM Council

- Joined EDM Council full-time 2015 to lead Industry Engagement
- EDM Council Co-Founder & First Chairman (2005-2007)
- EDM Council Finance Board Chair (2007-2015)
- Former CEO GoldenSource (2002-2015)
- Former Executive for D&B Software and Oracle
- FinTech Innovation Lab – Executive Mentor (2011 – Present)
- EDM Council COO (2020-2023)



Today's panel

Moderator



Mike Meriton

Co-Founder
EDM Council



Levent Ergin

Chief Strategist, ESG
Sustainability



Peter Ku

Chief Strategist,
Financial Services



Ryo Yoshiike

PMP, Sustainability
Data Leader



Fawad A. Qureshi

Field CTO,
Snowflake



The CDO's ESG Data Management Masterclass

Building a Holistic ESG Data Strategy



Chief Data Officers have the tough job of playing a balancing act between complying with a plethora of regulations whilst proving the business value of investment made in Data Governance technology.

In today's Webinar we will discuss :

- Critical success factors in building a holistic data strategy for all verticals (Financial Services, Retail, Life Sciences, etc.).
- The impact of the ESG Materiality Assessment on the ESG Data Strategy
- How to align the ESG Data Strategy with the ESG Sustainability Strategy
- How to mobilize an ESG Data Governance Program
- ESG Data Architecture and Platform Considerations

Foundations of a Holistic ESG Data Strategy

An ESG Data Strategy needs to meet the needs of the ESG & Sustainability objectives of the business.



**ESG & Sustainability
Objectives of the Business**



**ESG Data Strategy / Enterprise
Data Strategy**

All ESG Data Management efforts needs to move the dial for the ESG & Sustainability Objectives of the business.

The CDO's ESG Data Management Masterclass

Building a Holistic ESG Data Strategy – First Poll

ESG & Sustainability Objectives of the Business



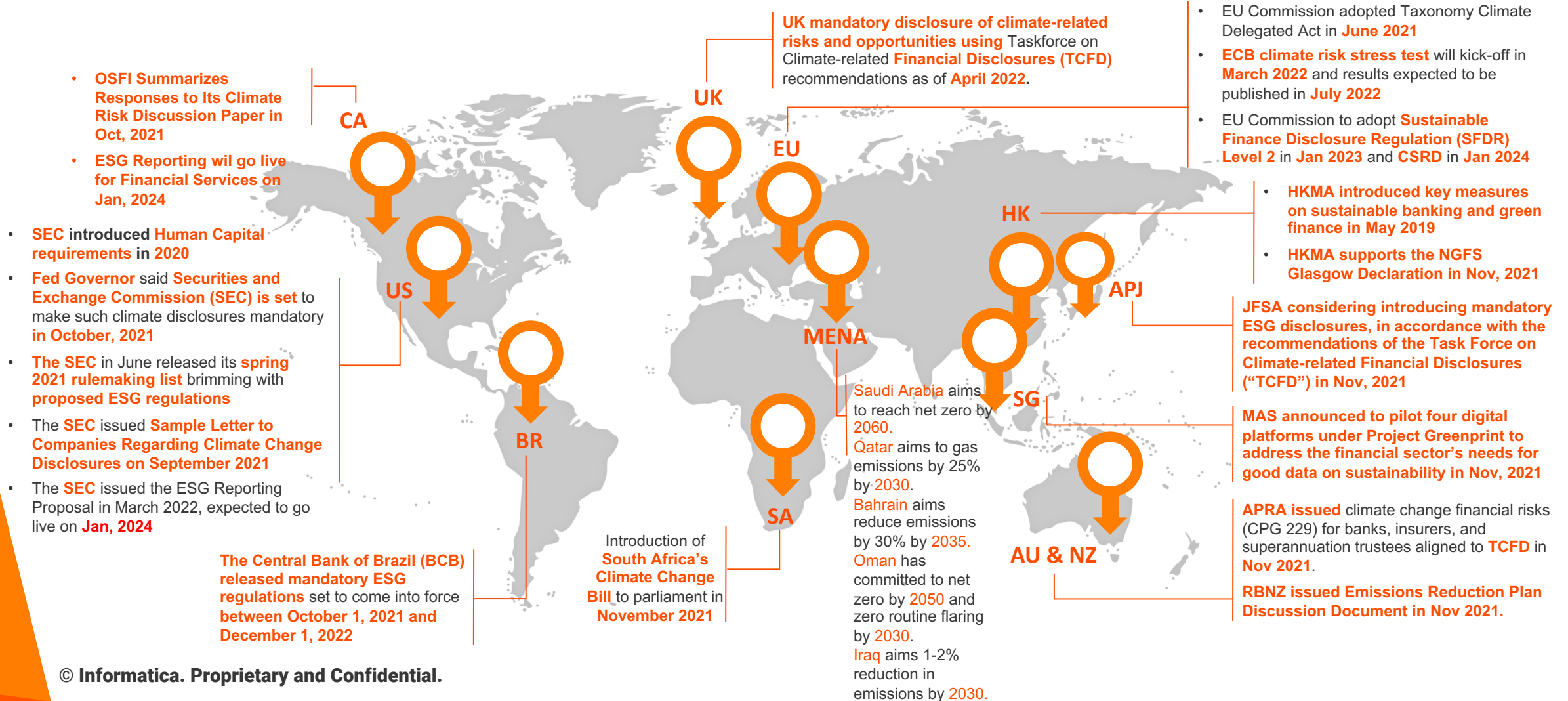
ESG Data Strategy / Enterprise Data Strategy

Poll 1 :

Please select the statement which is accurate for your organization:

- 1 – We do not have an ESG Data Strategy**
- 2 - We are currently defining our ESG Data Strategy**
- 3 – We have an ESG Data Strategy and are currently implementing the ESG Data Strategy**
- 4 – We have an ESG Data Strategy and have already implemented the ESG Data Strategy**

Global ESG Highlights – Move from Voluntary to Mandatory Disclosures by the Regulators



ISSB S1 & S2 Launched on 23rd of June 2023



Home > News > A new common language to build more resilient economics

ISSB Chair Emmanuel Faber at the IFRS Foundation Conference: A new common language to build more resilient economics



Emmanuel Faber, Chair of the International Sustainability Standards Board (ISSB), spoke at the IFRS Foundation Conference on Monday 26 June 2023 to officially launch the inaugural global ISSB Standards, IFRS S1 and IFRS S2.

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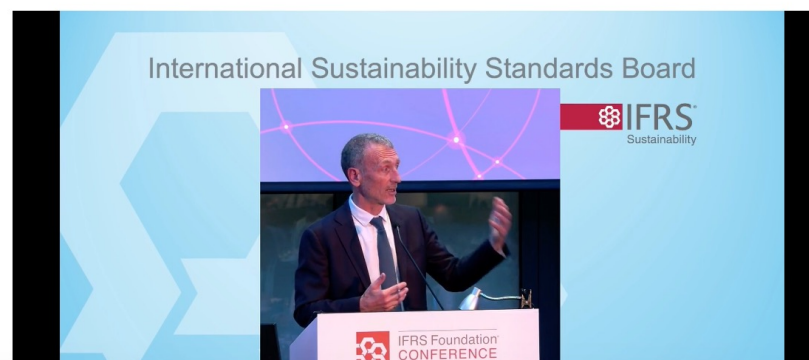
(TCFD).
The ISSB
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of Sustain

Sustainability translated into an accounting language, a new common language to build more resilient economics

98 years ago today, on 26 June 1925, Charlie Chaplin's film Gold Rush was released.

That movie poetically epitomises the limitations of the ruthless economics of Klondike during the rush for gold. Ruthless from an economic, social, human and environmental standpoint.

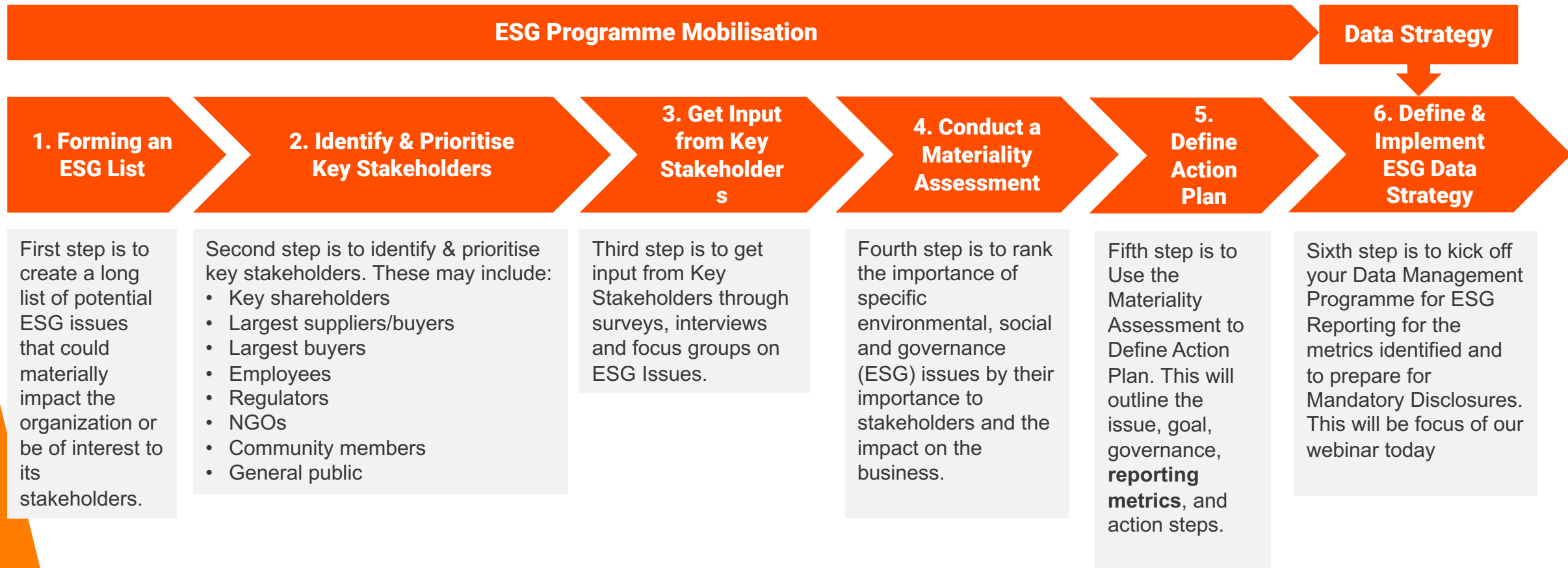


It's up to each Regulator as to how ISSB's S1 & S2 will be adopted. UK has already committed to including them in its sustainability disclosure requirements, and the government is expected to endorse the ISSB's initial rules within the next 12 months.

It's Critical for CDO's & Data Leaders to Identify & Engage ESG Stakeholders Early and Incorporate Their Data Requirements into the Data Strategy



It's Critical to understand the ESG & Sustainability Business Objectives, driven by the Materiality Assessment for the Data Strategy



Every Industry Will have Different Materiality Factors which is an important consideration in your ESG Data Strategy



Banking

1. Data Security
2. Access & Affordability
3. Product Design & Lifecycle Management
4. Business Ethics
5. Systemic Risk Management



Insurance

1. Selling practices & Product Labelling
2. Product Design & Lifecycle Management
3. Physical Impacts of Climate Change
4. Systemic Risk Management



Retail CPG

1. GHG Emissions
2. Energy Management
3. Water & Waste Water Management
4. Customer Welfare
5. Selling practices & Product Labelling
6. Product Design & Lifecycle Management
7. Supply Chain Management
8. Materials Sourcing & Efficiency



Healthcare Delivery – 11 out of 26

1. Energy Management
2. Waste & Hazardous Materials Management
3. Data Security
4. Access & Affordability
5. Product Quality & Safety
6. Customer Welfare
7. Selling practices & Product Labelling
8. Employee Health & Safety
9. Employee Engagement, Diversity & Inclusion
10. Physical Impacts of Climate Change
11. Business Ethics

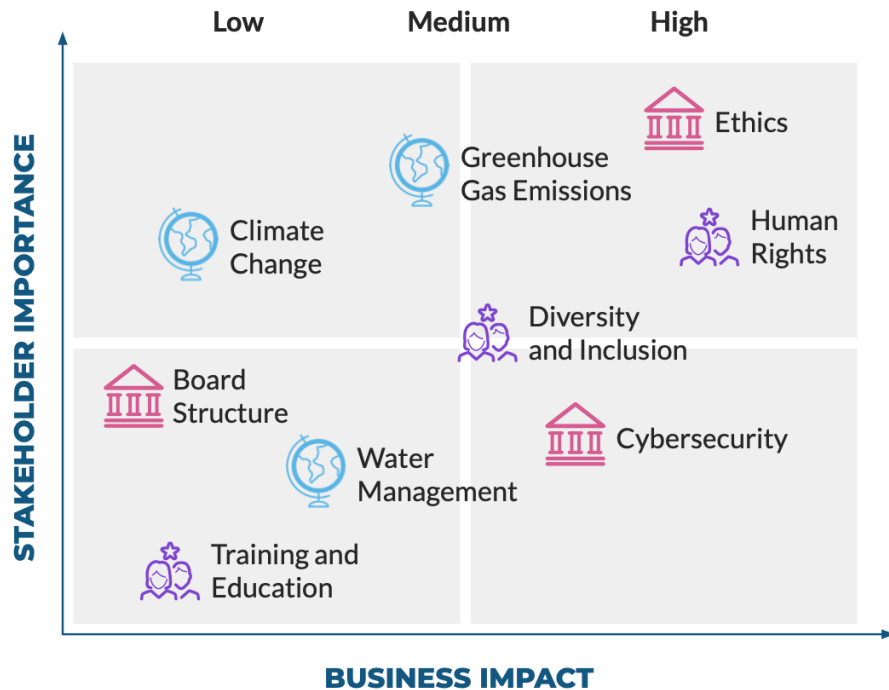


Lifesciences 8 out of 26

1. Human Rights & Community Relations
2. Access & Affordability
3. Product Quality & Safety
4. Customer Welfare
5. Selling practices & Product Labelling
6. Employee Engagement, Diversity & Inclusion
7. Supply Chain Management
8. Business Ethics

The CDO's ESG Data Management Masterclass

Building a Holistic ESG Data Strategy – Second Poll



Poll 2 :

Please select the statement which is accurate for your organization:

1 – We have not integrated our materiality factors into our ESG Data Strategy

2 – We are currently integrating our materiality factors into our ESG Data Strategy

3 – We have integrated our materiality factors into our ESG Data Strategy

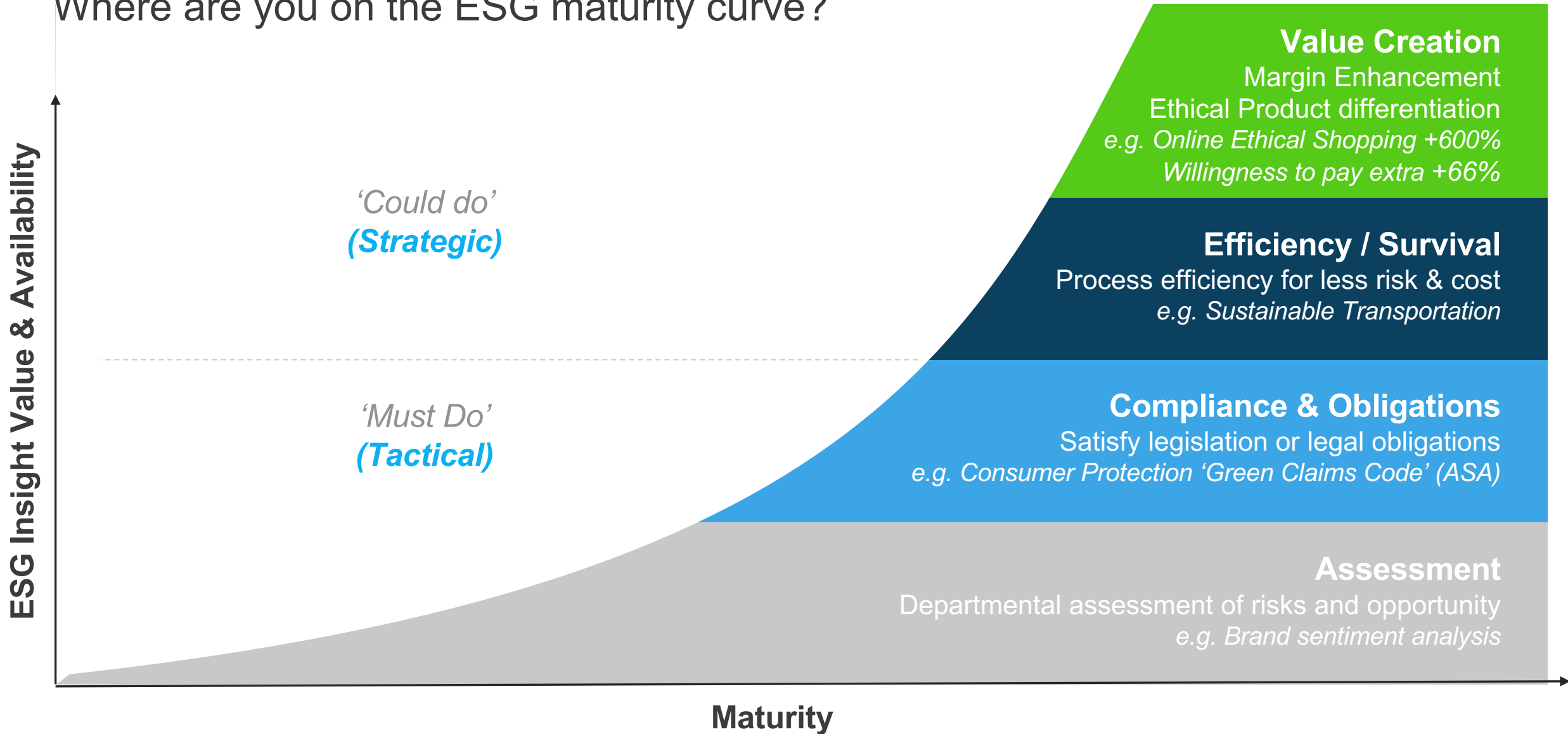
ESG ANALYTICS

What gets measured gets managed!

Fawad A. Qureshi
Industry Field CTO

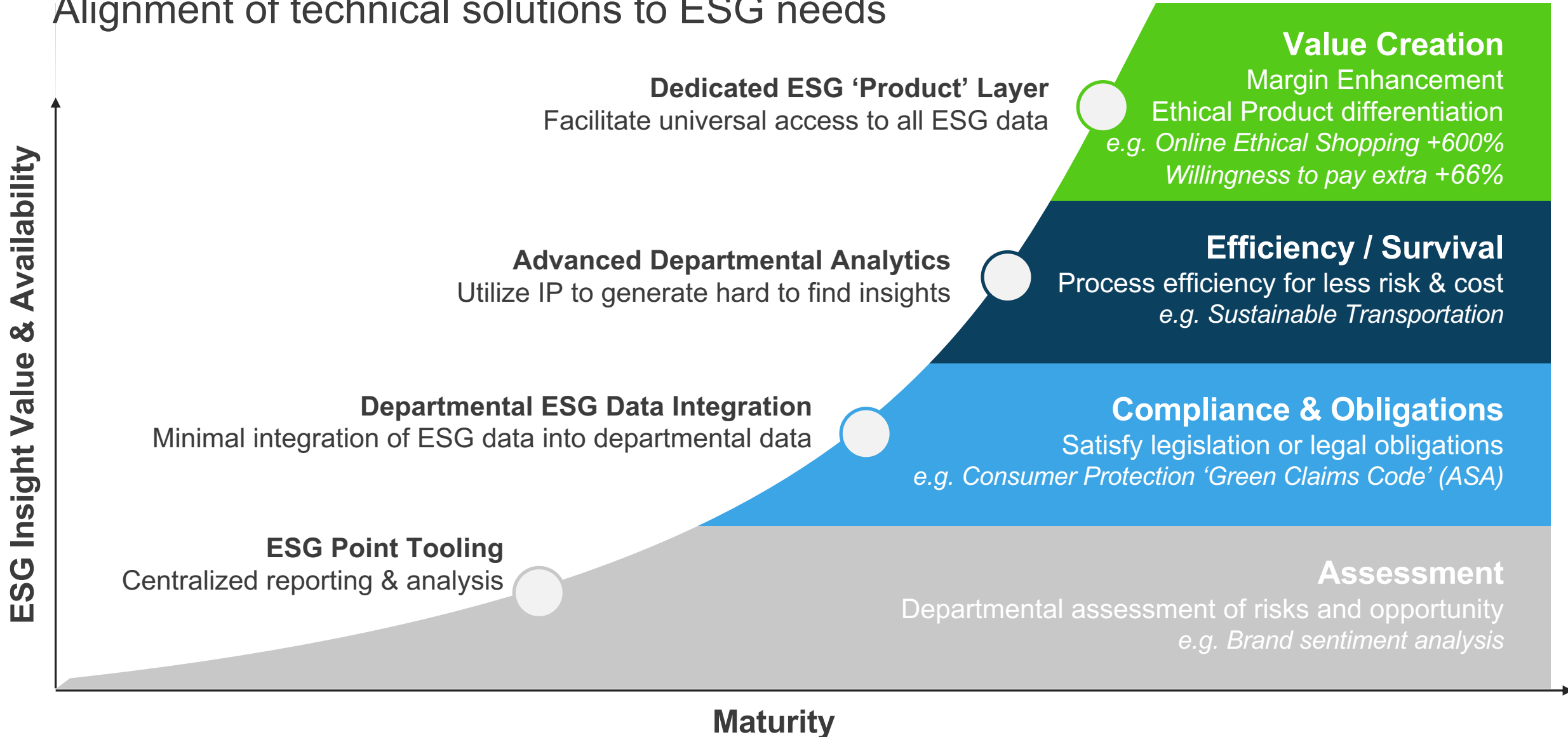
ESG JOURNEY

Where are you on the ESG maturity curve?



DATA ARCHITECTURE

Alignment of technical solutions to ESG needs



HOW BUSINESSES ACQUIRE ESG DATA

The Importance & Creation of Proprietary ESG Metrics



ESG ANALYTICAL DATA APPLICATIONS

A data driven approach to ESG with Snowflake Marketplace & Data Applications



Responsible Procurement Advice

Identify responsible suppliers with transition plans, carbon disclosures, social policies



Check Supply Chain Labour, Social & Sustainability

Acquire data directly from suppliers then cross reference for validation



Identify Supply Chain Risk

Utilise diverse data sources to identify upstream supply chain challenges



Carbon Reporting & Disclosure

Automated metric capture and calculation for regulatory and legal compliance



Emissions Calculations & Optimization

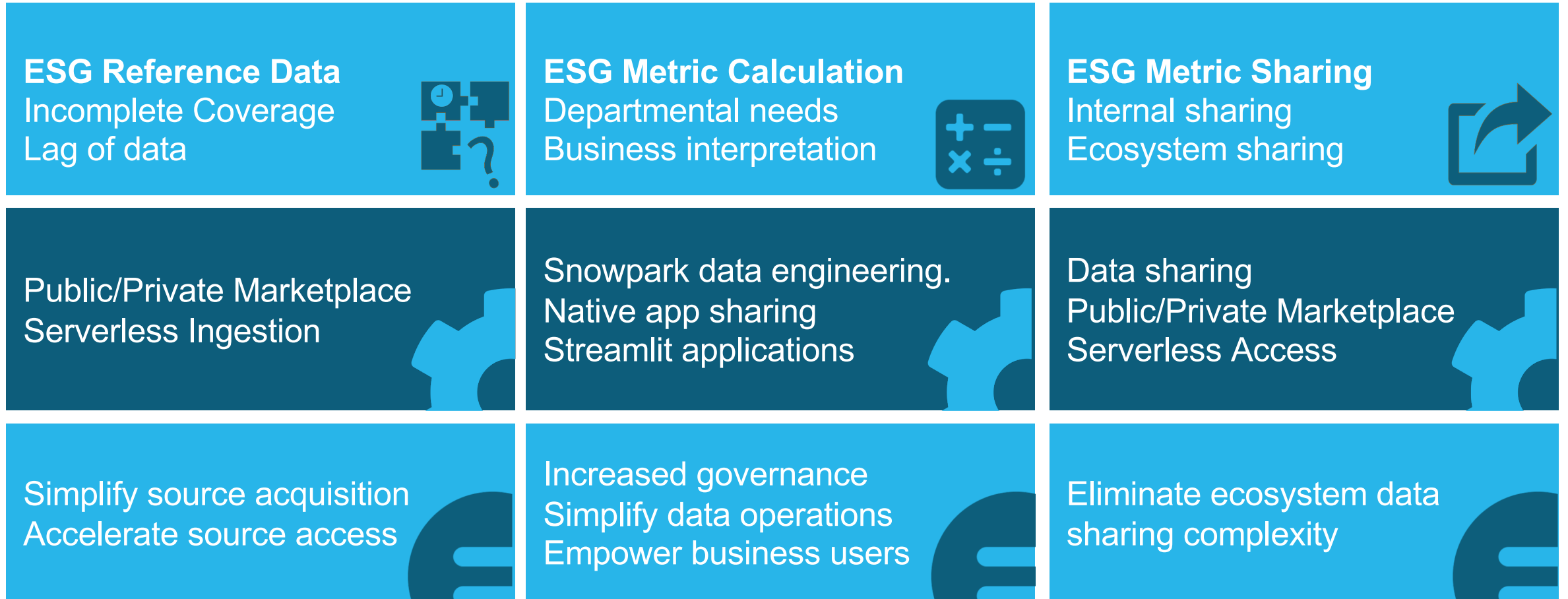
Utilize operational and sensor data to reduce energy and fuel consumption



Customer Experience / Personalization

Utilise ESG metrics for sustainable product recommendations to customers

Snowflake: Simplifying the ESG Data Journey



It's Critical to understand ESG Business Imperatives, Use Cases by Personas for a Holistic ESG Data Strategy


Business Imperative(s)



REGULATORY COMPLIANCE



Scope 3 SUPPLY CHAIN DUE DILIGENCE & CIRCULAR ECONOMY



ESG INTEGRATION



ESG IMPACT MEASUREMENT



NET-ZERO CARBON EMISSIONS

Use Cases

TCFD Reporting for Regulatory Compliance for in US, UK, EU and G7 & G20 Countries

Scope 3 – Carbon Emissions in the Supply Chain

Integrate ESG Data Into all Decision-Making Processes to decarbonize your Target Operating Model

Linking Business Activities and Data to the 17 Sustainable Development Goals by the United Nations

Measure Science Based against Net-Zero Carbon Emissions targets against clean, trusted ESG Data

EU Taxonomy Alignment by Reporting Revenue, CAPEX & OPEX according to the EU Taxonomy for the European Union

Scope 3 – Category 15 – Financed Emissions (FSI)

Integrate ESG Data Into Climate Stress Testing Scenarios or Physical Risks in TCFD Reporting

Report to CDP as well as ESG Rating Agencies such as MSCI, ISS, Sustainalytics, etc.

ESG Due Diligence in Human Rights and Environment

Create Circular Economies with 4Rs of Reduce, Reuse, Recycle and Remove

Personas

CFO, CSO, CPO

CFO, CSO, CPO

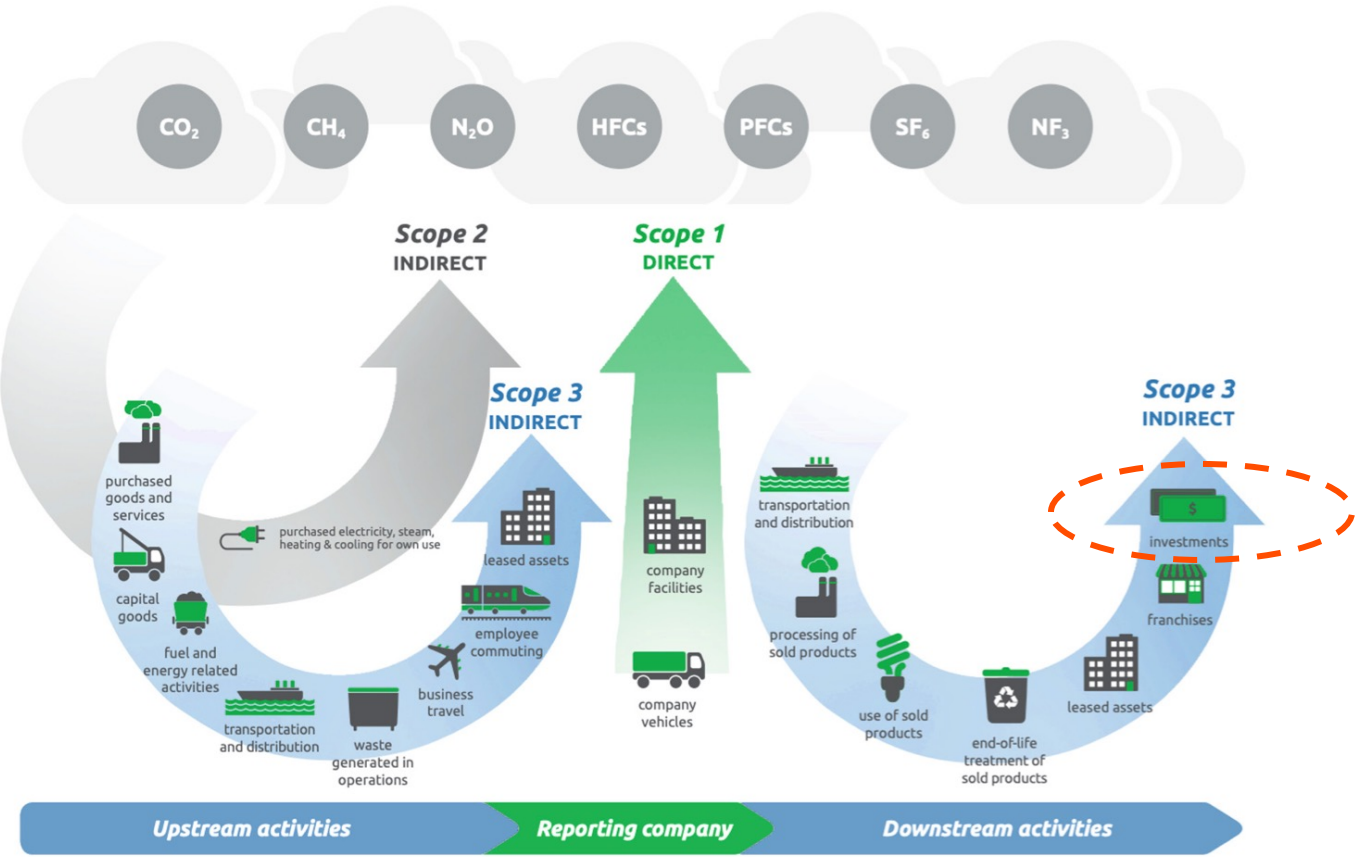
CRO, CSO, CPO

CEO, CSO

CEO, CFO, CSO, CPO

Understanding the Carbon Footprint of your Investment Portfolio is an Industry Pain Point in Financial Services

OVERVIEW OF GHG PROTOCOL SCOPES AND EMISSIONS ACROSS THE VALUE CHAIN



CATEGORIES

- 1: Purchased Goods and Services
- 2: Capital Goods
- 3: Fuel- and Energy-Related Activities Not Included in Scope 1 or Scope 2
- 4: Upstream Transportation and Distribution
- 5: Waste Generated in Operations
- 6: Business Travel
- 7: Employee Commuting
- 8: Upstream Leased Assets
- 9: Downstream Transportation and Distribution
- 10: Processing of Sold Products
- 11: Use of Sold Products
- 12: End-of-Life Treatment of Sold Products
- 13: Downstream Leased Assets
- 14: Franchises
- 15: Investments

Source: Greenhouse Gas Protocol Technical Guidance for Calculating Scope 3 Emission <https://ghgprotocol.org/scope-3-technical-calculation-guidance>

Understanding your External Data Requirements such ESG Rating Agency Data is a critical step for your ESG Data Strategy



Climate Stress Testing is a Key Requirement by the Regulators in EU (ECB) and now the Fed – Key Consideration for ESG Data Strategy For FS



2022 climate risk stress test

BANKENTOEZICHT

July 2022

BANKTILSYN BANKU LIZPĀLDZĪBA

Pilot Climate Scenario Analysis Exercise

Participant Instructions

January 2023

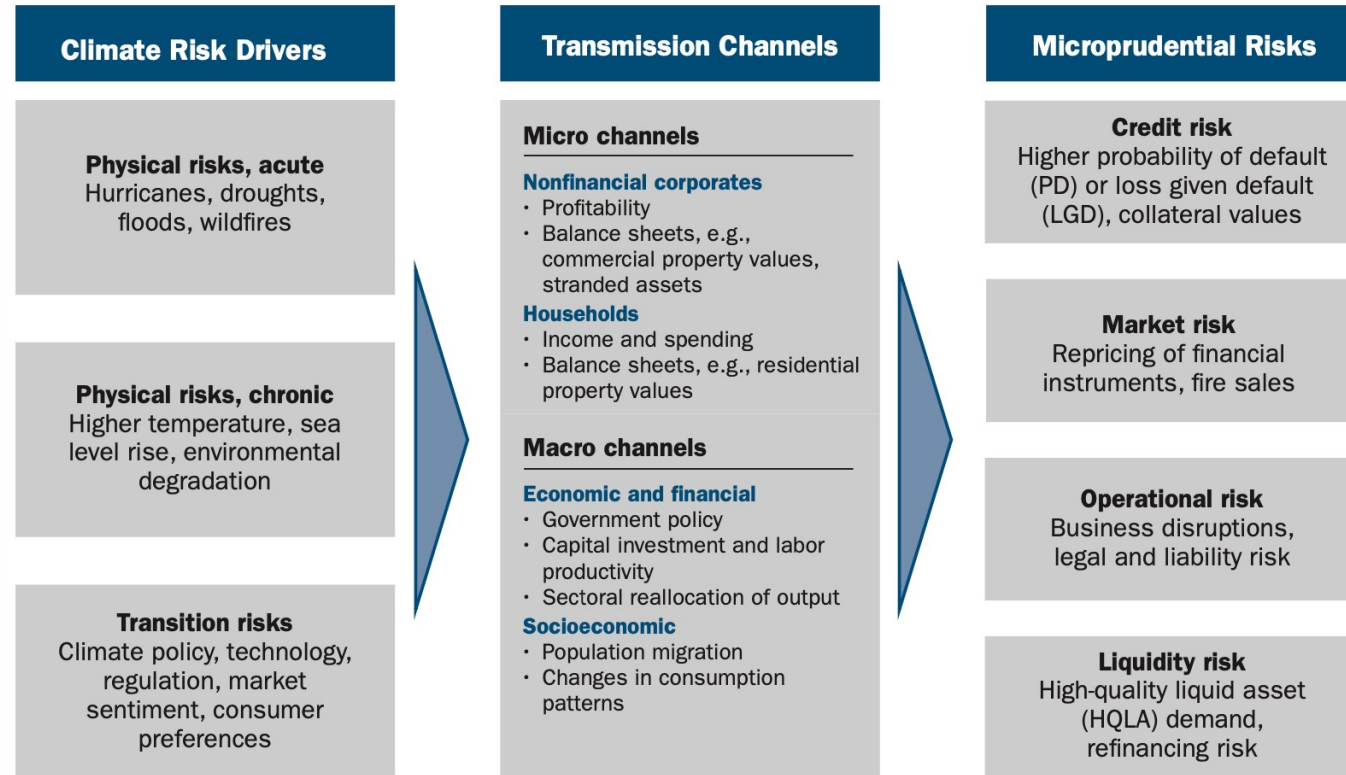


BOARD OF GOVERNORS OF THE
FEDERAL RESERVE SYSTEM

Climate risk data requirements will also need to be part of the ESG Data Strategy

Figure 1. Climate risk drivers manifest as prudential risks

Climate risk drivers could bring about microprudential risks to supervised financial institutions. These risks may manifest through a variety of transmission channels.

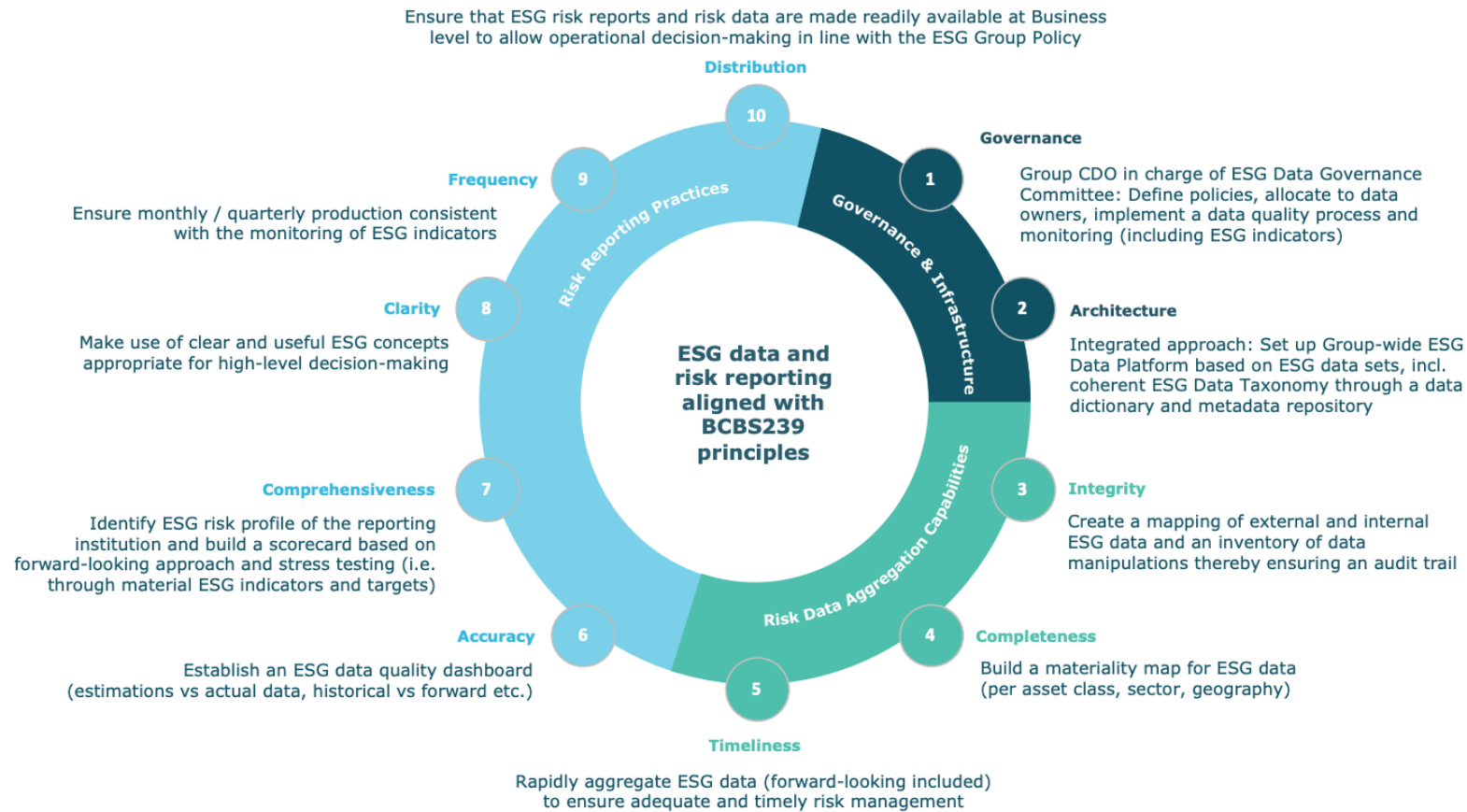


Note: Examples are indicative and not exhaustive.

<https://www.federalreserve.gov/publications/files/csa-instructions-20230117.pdf>

ESG Risks and BCBS239 Principles are also a key consideration for your ESG Data Strategy

Figure: ESG Data Aggregation and Risk Reporting Framework



https://mladvisory.eu/wp-content/uploads/2021/01/One-Pager_ESG-Data-Quality_012021.pdf

Questions?



Informatica™

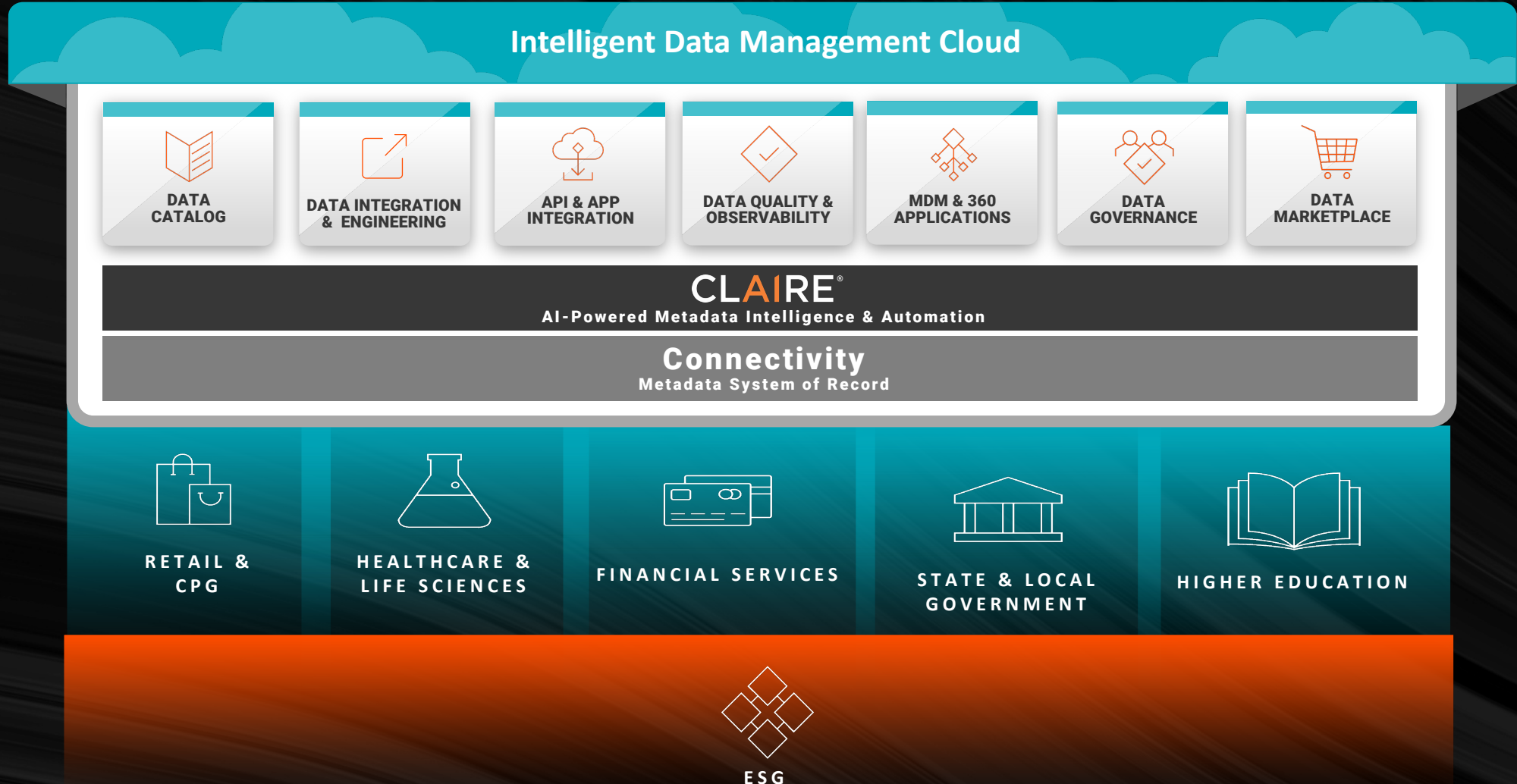
Deloitte.



snowflake®

EDM Webinar 

Your ESG Data Strategy will also need a Tooling Strategy To Deliver Your ESG Data Requirements to the Business



...and Why Informatica?

ESG Customer Success Story – Federated Hermes



The banner features the Informatica logo in the top left corner. The main text reads "Achieve ESG Sustainability with Purpose". Below this, the date and time are listed: "Tuesday, December 13, 2022 | 12PM GMT / 2PM CEST". A prominent orange button with the text "REGISTER NOW" is positioned below the date. On the right side, two speakers are introduced: Sally Bashuan, Executive Director and Head of Enterprise Data Governance at Federated Hermes, and Levent Ergin, Chief Sustainability Strategist at Informatica. Their portraits are set within diamond-shaped frames with orange borders. The background includes a light blue wave at the bottom and several translucent, faceted geometric shapes in shades of blue and white.

<https://www.informatica.com/gb/about-us/webinars/reg/accelerating-data-governance-for-esg-a-fireside-chat-with-federated-hermes-4015097.html>

Thank you from today's speakers



Levent Ergin
Chief Strategist, ESG
Sustainability



Peter Ku
Chief Strategist,
Financial Services



Ryo Yoshiike
PMP, Sustainability
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Fawad A. Qureshi
Field CTO,
Snowflake

Call to Action

We are offering a complementary ESG Data Readiness Assessment. To claim this offer please contact:

esg@informatica.com

Join EDM Council and our membership community of companies...



The screenshot shows the EDM Council website homepage. At the top, there is a navigation bar with links for Membership, Frameworks, Training, Engage, Innovation, About, Sign in, and a prominent Join now button. The main header features the EDM Council logo and a large title: "Global Advocates for Data & Analytics Management". Below the title, a sub-header reads: "The leading global trade association providing best practices, standards and education to data and business professionals in our data-driven world." A "What we do" button is visible. On the right side, there is a "TODAY'S HIGHLIGHTS" section with three news items: "Bank of Valletta becomes the newest member to join the EDM Council", "EDM Council welcomes Webber Wentzel as its newest member", and "Lion Group joins EDM Council as its newest member". At the bottom of the screenshot, there is a banner with the text: "Join a vibrant community of 25,000+ business leaders, CDOs, and data and analytics professionals across all industries." Below this banner are logos for Bank of England, NOVARTIS, HSBC, AWS, Schneider Electric, Microsoft, Google, and AEGON. Two buttons are present: "Explore membership" and "See all 350+ member organizations".



350+ Member Firms

Cross-industry,
including Regulators



25,000+

Professionals



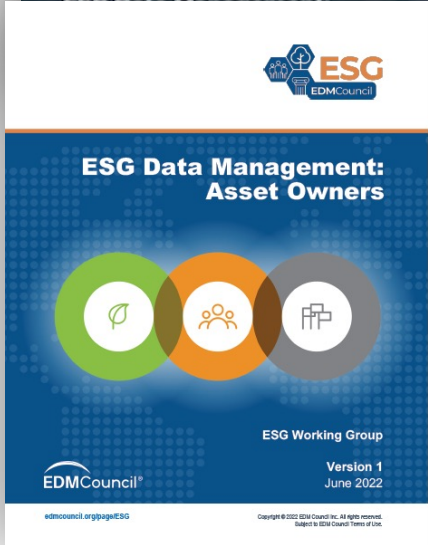
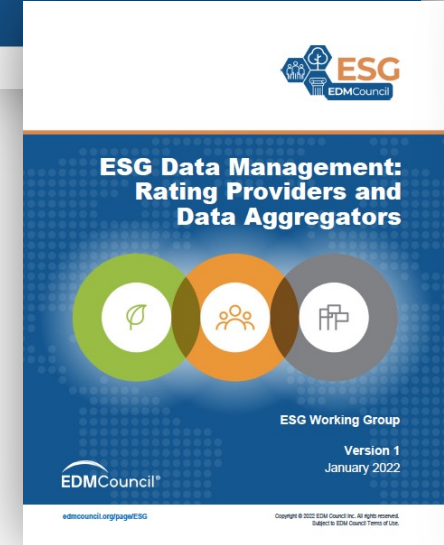
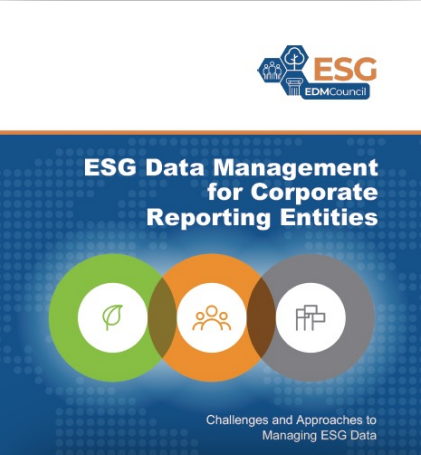
Worldwide

Americas, Europe,
Africa, Asia, Australia

edmcouncil.org



EDM Council – ESG Data Workgroup Reports



Download ESG Data Management guidelines for:

Corporate Reporting Entities

Investment Product Creators

Ratings Providers and Data Aggregators

Asset Owners

Free license – download at:
www.edmcouncil.org
Go to Engage > Groups > ESG Data



EDM Webinar 

Thank you!

FOR MORE INFORMATION:

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