



Sector and Theme Reports

I. What are Eurosif's Sector and Theme Reports?

The sector and theme reports are aimed at institutional investors, mainstream asset managers, policy makers, companies, and the general public. The reports should help readers to better understand risks that lie outside the realms of traditional financial analysis, but influence investments.

II. Rationale

Eurosif's ability to produce such high quality product is due to being able to choose from the expertise within the Eurosif Affiliate Membership. For example, in order to produce a detailed analysis of the social and environmental issues as well as the potential risks and opportunities for companies' long-term returns in each sector, Eurosif partners with a research partner (RP) within the affiliate membership that has demonstrated expertise for the particular sector. The researcher helps Eurosif put together relevant content. Similarly, Eurosif selects a Steering Committee Group for each report from within the affiliate membership to supervise, edit and approve the content. This Steering Committee is composed of leading asset managers, NGOs and others with relevant industry expertise.

Researchers welcome the opportunity to work on these reports as they gain exposure to Member Affiliates and to our wider ESG network. Researchers are typically flexible, easy to work with and do not request payment of any kind. The research provider is invited to present the report, alongside Eurosif, at all launch events around the study.

III. Process Framework

This document provides a framework for the selection of the 4 Eurosif reports (theme and sector¹) that are compiled each year.

Some basic Eurosif principles will systematically be considered by Eurosif's researcher before he/she submits a selection of potential topics to Eurosif's Executive Committee for approval at the end of each calendar year (December). The purpose of this document is to outline these basic principles.

The research process, as well as the outputs, of such reports is also detailed.

¹ Theme reports are usually 6 pages long; sector reports are usually 4 pages long.



a. Selection Process (see Feasibility Assessment Grid, page 4)

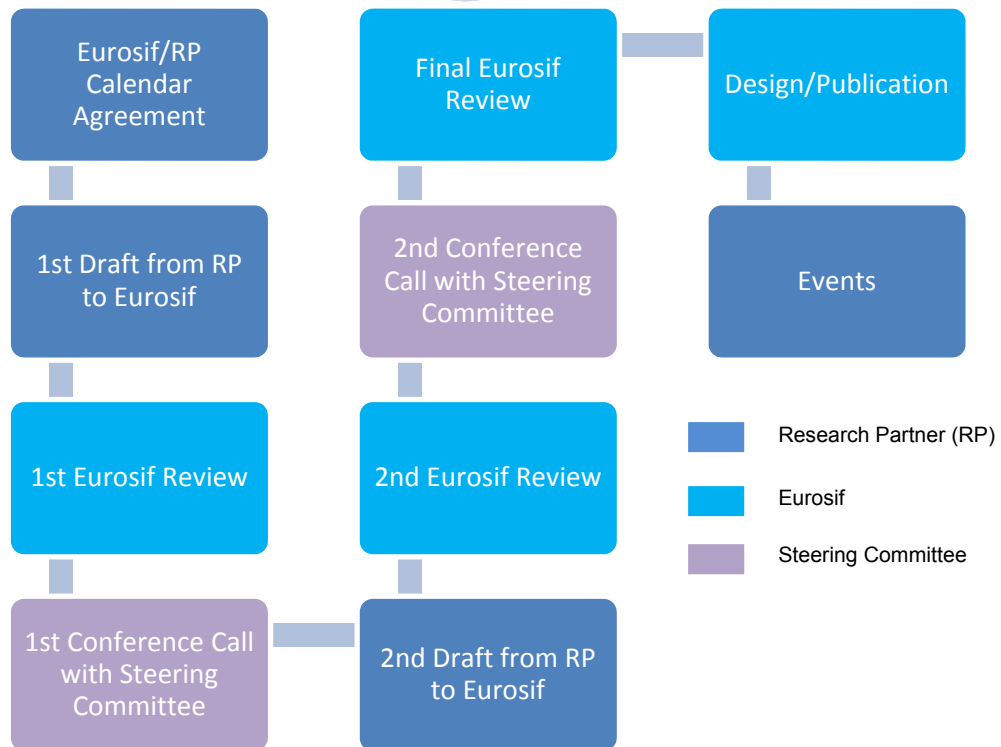
Sector/Theme Selection Principles:

- Connection to Eurosif **Lobbying** efforts
- Connection to Eurosif **Research** (studies and reports)
- Connection to **market demand/need**
- Connection to **Le Monde article series**
- Connection to **World/European news**
- Contribution to advancement of **ESG factors** into corporate strategy and investment policy

RP/Steering Committee Selection Principles:

- Recognised **expertise** on selected topic
- Research partner can only be a '**research provider**', not an asset manager
- Eurosif to ensure that Research Partner is fully **fluent in English** (written and spoken)

b. Research Process



c. Research Output

Electronic

- 1) Press Release drafted by Eurosif in coordination with RP
- 2) Official release date agreed with RP
- 3) Report published on Eurosif's website with announcement on main page
- 4) Newsletter announcement of report release

Paper

- 1) 500 copies for Eurosif
- 2) Copies sent to RP (prior to launch event if necessary)

Events

- 1) Report distributed at all Eurosif events
- 2) RP or Member Affiliate launch event of report; RP and Eurosif represented



I. Feasibility Assessment Grid

Proposed Sector/Theme:

Research Questions:

Does it fit with:		Yes <input type="checkbox"/> No <input type="checkbox"/>	How?
Eurosif Activities	Lobbying Efforts		
	Studies Previous Sector/Theme Reports		
	Le Monde Partnership		
External Demand	Market Demand or Need		
	EU Policy Agenda		
General 'Hot Topics' / News Items	European		
	Global		
Advancement of ESG factors	Corporate Strategy		
	Investment Policy		
Future SRI/CSR Events and Milestones	Member Affiliates' Events		
	EU Calendar		
	Global Calendar		

Final Decision

APPROVED / REJECTED

Comments