

## FOI 202300385923 – Documents for Release

### Requested information

In order to reduce size

Please send me copies of all correspondences to/from Scottish Ministers relating to invitations to dinners, events, conferences, panels or meetings from the three companies

1. The Global Ethical Finance Initiative (GEFI)
2. Home - Ethical Finance Hub
3. Home - Islamic Finance Council UK (ukifc.com)

### DOCUMENTS FOR RELEASE

1. Email

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>

**Sent:** Monday, January 23, 2023 7:50 AM

**To:** First Minister <firstminister@gov.scot>; Public Engagement Unit <CorrespondenceUnit@gov.scot>

**Subject:** FW: Speaker Invitation to participate in Ethical Finance Global Summit 2023

Good morning

Can you please upload this invite to MiCase and allocate to me please ([redacted s 38 -personal information]@gov.scot)

FMPO: I will prepare the PS minute accordingly and send to you

Thanks

[redacted s 38 -personal information]

[redacted s 38 -personal information] Team Leader ESG Financial Services and FinTech | Scottish Government | M: [redacted s 38 -personal information]

**From:** [redacted s 38 -personal information] (GEFI) <[redacted s 38 -personal information]@globlethicalfinance.org>

**Sent:** 20 January 2023 16:52

**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>

**Cc:** Omar (GEFI) <[redacted s 38 -personal information]@globlethicalfinance.org>; events

<events@globalethicalfinance.org>

**Subject:** Speaker Invitation to participate in Ethical Finance Global Summit 2023

Dear **[redacted s 38 -personal information]**,

Hope this email finds you well.

Please find attached a formal invitation letter for the First Minister, Nicola Sturgeon from our chair, Dame Susan Rice.

We welcome your positive response. We are happy to pick up with your team in relation to any questions you might have about the summit. I look forward to hearing from you at your earliest convenience.

Kind Regards,

**[redacted s 38 -personal information]** | Events Manager

M: +**[redacted s 38 -personal information]**

[www.globalethicalfinance.org](http://www.globalethicalfinance.org)

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2. Invitation



Nicola Sturgeon First Minister

St. Andrew's House Regent Road Edinburgh

EH1 3DG

Global Ethical Finance Initiative 423 Paisley Road West Bellahouston Business Centre

Glasgow G51 1PZ

18 March 2022

Dear First Minister

**Invitation to Participate in Ethical Finance Global 2022**

Firstly, I would like to thank you for supporting the Scottish Taskforce for Green and Sustainable Financial Services. As we emerge from COP26 I believe that the Taskforce has an important role to play in securing Scotland's place as a globally recognised centre for ESG / Ethical finance and maximising the economic and employment benefits to Scotland.

We met briefly after your keynote address at our Ethical Finance Global Summit 2019. Over the last two years the Summit has continued, albeit in a virtual format. Last year's event attracted [95 speakers](#) (45% female and 44% from outside Europe and North America) and 4,000 plus registrations from over 100 countries. Videos are available to view on our [EFx.global platform](#).

As you know GEFI is a non-profit based in Scotland with a global footprint. We are dedicated to enabling finance to deliver positive change and help achieve the UN's Sustainable Development Goals. The Summit is our flagship event and a unique opportunity to convene the global debate in Scotland.

I would like to invite you to deliver a keynote address at this year's Summit. Ethical Finance Global, now in its 7<sup>th</sup> year, has a history of driving action through frank, honest debate amongst a global coalition across financial services. As well as yourself, previous year's keynote addresses have included: Gordon Brown, Dame Susan Rice, Achim Steiner, Archbishop Justin Welby and Bill Winters.

Ethical Finance Global 2022 will be held at the NatWest Conference Centre in Edinburgh on Tuesday 6<sup>th</sup> September 2022 with the theme being "ESG in a Volatile World – Profit, Purpose or Politics?" As well as looking at macroeconomic issues impacting global markets, we will have specific sessions on topics including leadership and purpose, climate, nature and 'S' in ESG. In line with our focus on global inclusion this year we are launching Ethical Finance ASEAN 2022 (29 June in partnership with the Asian Institute of Chartered Bankers) and Ethical Finance Africa (tbc with the African Development Bank).

Our global audience would benefit greatly from hearing about how Scotland is working towards becoming a world-leading hub for green and sustainable finance.

We are happy to work with your team to confirm the logistics, format, topics and timings around your visit or remote participation.

With Covid-19 and the Ukraine War exposing the fragility of health, security and economic systems around the world we believe the Summit is now more important than ever. We look forward to hearing from your team soon and would be more than happy to schedule a call to discuss in more detail.

Yours sincerely,

**Chris Tait**  
Chief Operating Officer, Global Ethical Finance Initiative  
[\[redacted s 38 -personal information\]@globoethicalfinance.org](mailto:[redacted s 38 -personal information]@globoethicalfinance.org)  
[sent electronically]



Global Ethical Finance Initiative is a not-for-profit organisation registered as a company limited by guarantee registered in Scotland (number SC627973).

### 3. Invitation

The Nicola Sturgeon 20 January 2023

First Minister

St Andrew's House Regent Road Edinburgh

EH1 3DG

Dear First Minister,

**Invitation to Participate in Ethical Finance Global Summit 2023: Wednesday, 20<sup>th</sup> of September**

I am writing to you to invite you to participate at our forthcoming annual Summit, Ethical Finance Global 2023, held under the patronage of the Scottish Government. The Global Ethical Finance Initiative (GEFI) is a non-profit based in Edinburgh with a global footprint. We are dedicated to enabling finance to deliver positive change and help achieve the UN Sustainable Development Goals.

Our annual Summit is now in its 8<sup>th</sup> year and has a history of driving action through frank and honest debate amongst a global coalition across financial services. Previous years' keynote addresses have included: Gordon Brown, Bill Winters, Julia Hoggett, Achiem Steiner, Zeti Aziz and the Archbishop Justin Welby amongst others.

Ethical Finance Global 2023 will be held at the NatWest Conference Centre in Edinburgh on Wednesday 20<sup>th</sup> September 2023 with the theme "**ESG Emergency? From Promises to Solutions.**" The Summit will explore topics including overcoming greenwashing, climate justice, embedding sustainability skills, integrating nature, sustainable food systems and the incorporation of human rights.

We would be delighted for you to join us in-person in Edinburgh to deliver a keynote address.

Additionally, we would like to cordially invite you to the VIP Scottish Government reception in the prestigious Great Hall of Edinburgh Castle later that evening.

We look forward to hearing from your team soon and would be more than happy to schedule a call to discuss in more detail.

Yours sincerely,

*Dame Susan Rice*

Dame Susan Rice

Chair, Global Ethical Finance Initiative [\[redacted s 38 -personal information\]@globlethicalfinance.org](mailto:[redacted s 38 -personal information]@globlethicalfinance.org)  
[sent electronically]

### 4. Email

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot> **On Behalf Of** Cabinet Secretary for Finance  
**Sent:** Friday, September 4, 2020 2:52 PM



**To:** Public Engagement Unit <CorrespondenceUnit@gov.scot>  
**Cc:** Cabinet Secretary for Finance <CabSecFinance@gov.scot>; Cabinet Secretary for Economy, Fair Work and Culture <CabSecEFWC@gov.scot>  
**Subject:** FW: Invitation for Kate Forbes to address virtual Global Ethical Finance Summit 2020

AO – [redacted s 38 -personal information]

PEU – diary case for Stephen O'Neill's team in Economy. Can we make sure Economy PO see the advice on this as well.

[redacted s 38 -personal information] – further to our conversation last Friday, just received this

[redacted s 38 -personal information]

[redacted s 38 -personal information]

**Private Secretary to the Cabinet Secretary for Finance**

**The Scottish Government**

St Andrew's House | Regent Road | Edinburgh | EH1 3DG | **M:** [redacted s 38 -personal information] |

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**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@quantumcommunications.co.uk>  
**Sent:** 04 September 2020 14:37  
**To:** Cabinet Secretary for Finance <CabSecFinance@gov.scot>  
**Subject:** Invitation for Kate Forbes to address virtual Global Ethical Finance Summit 2020

Dear Kate,

I hope you are well.

I'm writing to you on behalf of the Edinburgh-based Global Ethical Finance Initiative (GEFI), which we have previously discussed. GEFI will be hosting the 5th annual Global Ethical Finance summit 2020 between Monday 5th and Thursday 8th October 2020. This year's event will take place virtually.



With COVID-19 exposing the fragility of health security and economic systems, GEFI believes that ethical finance has a pivotal role to play in building social, environmental and economic resilience.

GEFI would be delighted if you would consider recording a video address in advance for use at the virtual conference? Other speakers include Richard Curtis, Alison Rose (NatWest Group), Dame Susan Rice, Keith Skeoch (Standard Life Aberdeen), Chris Stark (Committee on Climate Change) and James Talbot (Bank of England).

I hope this is something you would be willing to assist with, and I would be happy to help with logistics – whether it is easiest for your team to record you, or if you would like to participate via a remote broadcast studio that GEFI is arranging.

I would be happy to send a formal invitation from GEFI if that would be helpful, but thought it would be useful to get in touch via email first. Details of the agenda and topics can be found here: <https://www.globalethicalfinance.org/ethical-finance-2020/>

Best wishes,

[redacted s 38 -personal information]

[redacted s 38 -personal information]

Director

Quantum Communications

Tel: [redacted s 38 -personal information]

[www.quantumcommunications.co.uk](http://www.quantumcommunications.co.uk)

@Quantum\_Comms

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5. Email



**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot> **On**  
**Behalf Of** Cabinet Secretary for Finance and Economy  
**Sent:** Monday, July 4, 2022 9:36 AM  
**To:** Public Engagement Unit <CorrespondenceUnit@gov.scot>  
**Cc:** Cabinet Secretary for Finance and Economy <CabSecFE@gov.scot>  
**Subject:** FW: Dinner Invitation: 5th Sept (1830): Scottish TF for Green & Sustainable FS [EF22]

For MiCase as diary

[redacted s 38 -personal information]

Deputy Private Secretary to Cabinet Secretary for Finance and Economy – Kate Forbes

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

T: [redacted s 38 -personal information] | M: [redacted s 38 -personal information] | E: CabSecFE@gov.scot

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**From:** Chris (GEFI) <[redacted s 38 -personal information]@gloablethicalfinance.org>  
**Sent:** 04 July 2022 09:10  
**Cc:** Omar (GEFI) <[redacted s 38 -personal information]@gloablethicalfinance.org>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@gloablethicalfinance.org>  
**Subject:** Dinner Invitation: 5th Sept (1830): Scottish TF for Green & Sustainable FS [EF22]

Dear All,

Further to my email below, you are cordially invited to join the Ethical Finance Global Summit 2022 dinner taking place at the NatWest Group Business School at 1830 on Monday 5<sup>th</sup> September 2022. The dinner will be an opportunity to meet some of the senior global FS leaders joining for the Summit and will feature an address from Dame Susan Rice, GEFI Global Steering Group Chair.

Please RSVP to [redacted s 38 -personal information] (cc'd) to confirm your attendance. FYI, attached are details of our wider VIP programme during the Summit. Should you wish to participate in any of the private sessions or join the GEFI summit please get in touch.

The next Taskforce meeting is scheduled to take place at circa 1315 – 1430 on Wednesday 7<sup>th</sup> September 2022. A diary invitation will be circulated in due course.

Best regards,

Chris



**From:** Chris (GEFI)  
**Sent:** 24 May 2022 18:51  
**Cc:** Omar (GEFI) <[redacted s 38 -personal information]@gloablethicalfinance.org>; [redacted s 38 -personal information]  
**Subject:** Scottish TF for Green and Sustainable FS Meeting Action Points (4th May)

Dear All,

Thank you to members who attended (in-person or remotely) the Scottish Taskforce for Green and Sustainable Financial Services meeting kindly hosted by Phoenix Group earlier this month.

The next meeting will take place at **2.30pm, Wednesday 7<sup>th</sup> September 2022** at the NatWest Group Business School, Gogarburn. This will be alongside GEFI's annual Summit and we will be inviting all Taskforce member for a private dinner with our international guests.

Please find attached the key action points for your attention as noted at the meeting. To ensure a focused and progressive Taskforce your prompt involvement on the action points would be appreciated (specifically around point 5). In addition, as Secretariat, we will follow-up with individuals on other discussion points.

Separately, GEFI's Ethical Finance Round Table series resumes in-person in Edinburgh on Tuesday 14<sup>th</sup> June 2022. Phoenix Group, abrdn and S&P Global will be exploring ESG data provision, its development and its role in ethical asset management. Places are limited and you can find out more and register [HERE](#).

Best regards,

Chris

**Chris Tait** | Chief Operating Officer

M: +[redacted s 38 -personal information]

[www.gloablethicalfinance.org](http://www.gloablethicalfinance.org)

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6. Invitation



06 SEPTEMBER 2022

## VIP ITINERARY FOR ETHICAL FINANCE GLOBAL 2022\*

**Venue:** NatWest Group, Gogarburn Campus, Gogarburn, 175 Glasgow Road Edinburgh EH12 1HQ

Detailed below is the schedule of private, invite only events (roundtables, workshops, etc.) attached to the annual [Ethical Finance Global 2022 Summit](#). These events form the "SDG Hive" and will take place on Monday 5<sup>th</sup> and Wednesday 7<sup>th</sup>



September 2022. Participants will include subject matter experts, policy setters and senior financial services leaders from around the globe sharing insights and focusing discussions on practical outputs.

**MONDAY 05 SEPTEMBER 2022: NatWest Group Business School**

TIME	SESSION	OVERVIEW
0930 – 1230	GEFI Global Steering Group Meeting*	Private meeting of the GEFI GSG
1230 – 1400	Lunch	Lunch for all participants
1500 – 1630	Global Leaders Power Round Table	Global views on the finance sectors engagement with the SDGs.  Discussions on regional economic conditions and associated ESG challenges faced by markets and financial institutions.
1830 onwards	Dinner / Drinks Reception	Private dinner with Summit speakers, local and international financial services leaders.

**TUESDAY 06 SEPTEMBER 2022: NatWest Group Conference Centre**

TIME	SESSION	OVERVIEW
0900 – 0930	Registration	Registration and light refreshments for all VIPs, speakers and delegates for the Summit
0930 – 1645	Ethical Finance Global 2022 Summit	Annual summit entitled: 'ESG in a Volatile World: Profit, Purpose or Politics?'

**TUESDAY 06 SEPTEMBER 2022: Edinburgh Castle**

1800 – 2000	Scottish Government Evening Reception	Reception in the Great Hall, a wonder of medieval Scotland completed in 1511 for King James IV.
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**WEDNESDAY 07 SEPTEMBER 2022: NatWest Group Business School**

TIME	SESSION	OVERVIEW
0930 – 1230	Islamic Finance Power Round Table: <a href="#">Global Islamic Finance &amp; UN SDGs Taskforce</a>	Power roundtable session covering: <ul style="list-style-type: none"> <li>Key global trends in Islamic finance &amp; views from the global south</li> <li>Green &amp; sustainability linked sukuk/bonds</li> <li>Role for social finance and enhancing the \$trn Awqaf (endowments) sector to drive blended finance and Islamic asset management towards achieving the SDGs</li> </ul> Update from the Global Islamic Finance & UN SDGs Taskforce, including the Refinitiv/LSEG Green and Sustainability Sukuk report launch and initial findings of the largest global retail banking customer survey on the SDGs
0930 – 1300	<a href="#">Financing Nature</a> & Biodiversity Workshop	Scottish Government-led workshop, with DEFRA, UNEP FI and Global Canopy to look at policy and standards frameworks; global initiatives; and investable nature-based solutions
1230 – 1400	Lunch	Lunch for all participants
1315 – 1430	<a href="#">Scottish Taskforce</a> for Green and Sustainable Finance Meeting	Private meeting. Third meeting of the recently launched Taskforce
1430 – 1600	Women Leaders	Inspiring panel of global women leaders sharing their wisdom on successfully navigate diversity challenges

\*Live agenda. Details are subject to change.

Images of NatWest Group Business School where all private events will be held on Monday 5<sup>th</sup> September and Wednesday 7<sup>th</sup> September 2022:

Auditorium (Business School):



Lounge on 1<sup>st</sup> Floor (Business School):



Images of NatWest Group Conference Centre where the Annual Summit will be held on Tuesday 6<sup>th</sup> September 2022:

Exterior of Building:



Gardens:



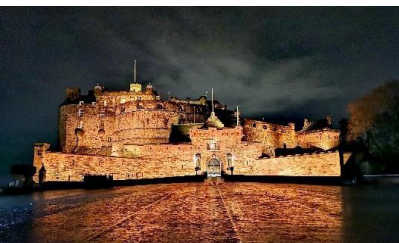
Reception Area:



Auditorium (Conference Centre):



Edinburgh Castle where we will host an evening reception at on Tuesday 6<sup>th</sup> September 2022:



7. Email

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Sent:** Wednesday, August 7, 2019 3:05 PM  
**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Subject:** FW: Invitation and catch-up

For erdm

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@undp.org>  
**Sent:** 29 March 2019 16:16  
**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>;  
[redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Cc:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>; Chris  
(GEFI) <[redacted s 38 -personal information]@globlethicalfinance.org>  
**Subject:** Invitation and catch-up

Dear [redacted s 38 -personal information] and [redacted s 38 -personal information],

I hope this email finds you well!

On behalf of UNDP and the Global Ethical Finance Initiative (GEFI), we're delighted to invite you to a forthcoming 'Finance for Nature' Summit which will take place in Edinburgh on 20-21 May. Please find attached further information and a draft programme.

The event is a partnership between the Scottish Government, UNDP and GEFI. The project seeks to develop a financial instrument/product that can support nature-based SMEs seeking finance in the US\$ 1 – 10 million 'missing-middle' range access the investment they need. It is oriented at building impact investment in developing countries, which is a growing area.

We would be delighted to have a representative from Scotland's international development team there.

Separately, while I'm in Scotland, I can also update you on our Zambia work to develop an impact bond to support tobacco farmers move into better livelihoods. We recently concluded our first study mission and are now developing the proposal for programme interventions and impact bond structure. These innovative finance initiatives take quite some time to put together, typically longer than we expect but there is a lot of interest in this work, including from the financial sector.

We look forward to hearing from you and happy to have a phone call should you have any questions,

Have a lovely weekend,

Best wishes,

[redacted s 38 -personal information]



Empowered lives.  
Resilient nations.

[redacted s 38 -personal information]  
Policy Specialist: Development Finance  
Bureau for Policy and Programme Support  
FF-961, 304 East 45<sup>th</sup> St, New York  
Tel (mob): + [redacted s 38 -personal information]  
Email: [redacted s 38 -personal information]@undp.org  
Skype: [redacted s 38 -personal information]  
Twitter: [redacted s 38 -personal information]

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#### 8. Invitation



27 March 2019

### Special Invitation | 2019 Finance for Nature Global Summit

On behalf of United Nations Development Programme (UNDP) and the Scottish Government, it is our distinct privilege to invite you to the inaugural Finance for Nature Global Summit in Edinburgh, Scotland on 20 and 21 May 2019.

The two-day event, delivered in partnership with the Global Ethical Finance Initiative (GEFI) and the

New York Declaration on Forests (NYDF) Global Platform, will convene 80 senior executives (representing financial institutions, corporations, supply chain intermediaries and Governments) to champion a new investment paradigm that accelerates the SDGs in developing economies.

Despite growing momentum for investments in sustainable development, the financing gap for the SDGs remains significant. Achieving the SDGs will require between US\$5 and 7 trillion annually, and with an estimated US\$ 2.4 trillion annual shortfall, the private sector will play a pivotal role in meeting financing needs. On the other hand, the SDGs represent [a \\$12 trillion unprecedented market opportunity](#) across four key economic systems: food and agriculture; urban development; energy and materials; health and well-being. Identifying how to tap private sector finance remains one of the biggest challenges to implementing the SDGs.

This calls on all of us to actively create new futures. This Summit will focus on identifying and bringing to market opportunities in emerging and developing economies that represent viable investment propositions for asset owners and managers. Please find attached a concept note and provisional agenda.

In recognition of your leadership in financing and sustainability, it would be an honour if you participated in this invitation-only boutique Summit. Being at the frontline of innovative climate-positive solutions, your rich experience as a thought-leader on forest action and ocean-smart engagement, would help shape an exciting discussion at this Summit.

It is fitting that we are hosting this event in Scotland. As well as a proud heritage in financial services, Scotland was one of the first nations to publicly sign up to the Global Goals and has since gone on to embed them in its National Performance Framework. The Scottish Government is committed to leveraging ethical finance to create a fairer Scotland and a better world both now and for generations to come.

I would welcome an early indication as to whether you can join us at this important event where we hope our collaborative efforts can lead to practical outcomes that can make a difference – for both people and planet. If you have any questions, please reach out to me or **[redacted s 38 -personal information]**@undp.org. We would appreciate if you could kindly confirm your availability by 5 April 2019 by registering [here](#).

Sincerely,



**[redacted s 38 -personal information]** Ph.D.  
Manager, Global Programme on Nature  
for Development United Nations  
Development Programme

UNDP | Bureau for Policy and Programme Support | Global Programme on Nature  
for Development 304 East 45<sup>th</sup> Street, 9<sup>th</sup> Floor, New York, New York 10017, USA | Tel:  
+**[redacted s 38 -personal information]** | [www.undp.org](http://www.undp.org)

#### 9. Email

**From:** **[redacted s 38 -personal information]** <**[redacted s 38 -personal information]**@gov.scot>  
**Sent:** Wednesday, October 21, 2020 1:55 PM

**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Subject:** FW: GEFI - COP26 Intro Call

To save as readout of stakeholder call

[redacted s 38 -personal information]

Head, International strategy and outreach | Climate Change Division | Directorate for Energy and Climate Change

**T:** +[redacted s 38 -personal information]

**M:** +[redacted s 38 -personal information]

: @ScotGovClimate



**From:** Chris (GEFI) <[redacted s 38 -personal information]@globlethicalfinance.org>  
**Sent:** 08 June 2020 12:28  
**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Cc:** [redacted s 38 -personal information]@globlethicalfinance.org; '[redacted s 38 -personal information]' <[redacted s 38 -personal information]@globlethicalfinance.org>  
**Subject:** RE: GEFI - COP26 Intro Call

Hi [redacted s 38 -personal information],

Great to speak last week to learn more about the Scottish Government's vision for COP26.

I noted the following points during the call:

**Finance for Nature Virtual Global Summit** - I have attached the draft agenda (please do not share) that provides you with details on the event we are currently working on with UNDP / COP26. As this is forms part of the UNDP / SG 2 year programme of collaboration the SG logo is on there but there is no designated lead or active engagement from SG. We considered inviting the FM to offer a brief keynote but I felt this might be insensitive given then covid-19 situation. If you think otherwise please let me know asap. This event may also be of interest to the Biodiversity team so we welcome an introduction as you suggested.

**EF2020 / COP26** - We note your interest in having an SG voice at some of our events (green recovery etc) and we would be interested in doing something together before or during COP26. We can keep in touch as our respective plans develop. We will share the next iteration of the [www.ethicalfinance2020.com](http://www.ethicalfinance2020.com) in due course as we are now transitioning to a fully online event and do let me know if you want to add the SG logo to [www.pathtocop26.com](http://www.pathtocop26.com).

My colleague **[redacted s 38 -personal information]** will add you to our distribution list to ensure you are looped in to future events (incl Responsible Business in a Time of Crisis)

**Scottish Enterprise** - Grateful if you can connect us with **[redacted s 38 -personal information]** as suggested.

Look forward to exploring scope for collaboration over the coming months!

Best regards,

Chris

**From:** Chris (GEFI) <**[redacted s 38 -personal information]**@gloablethicalfinance.org>  
**Sent:** 20 May 2020 09:44  
**To:** '**[redacted s 38 -personal information]**@gov.scot' <**[redacted s 38 -personal information]**@gov.scot>  
**Cc:** '**[redacted s 38 -personal information]**@gloablethicalfinance.org' <**[redacted s 38 -personal information]**@gloablethicalfinance.org>; **[redacted s 38 -personal information]**@gov.scot' <**[redacted s 38 -personal information]**@gov.scot>  
**Subject:** RE: GEFI - COP26 Intro Call

Morning **[redacted s 38 -personal information]**

That's great – I have sent the meeting invitation over and look forward to speaking in two weeks!

Best regards,

Chris

**From:** **[redacted s 38 -personal information]**@gov.scot <Tessa.Ferry@gov.scot>  
**Sent:** 20 May 2020 09:09  
**To:** **[redacted s 38 -personal information]**@gloablethicalfinance.org

**Cc:** [redacted s 38 -personal information]@gloablethicalfinance.org; [redacted s 38 -personal information]@gov.scot  
**Subject:** RE: GEFI - COP26 Intro Call

Chris

10 o'clock works well, and if you could set up a zoom call that would be fantastic.

If possible could you also invite my colleague [redacted s 38 -personal information] (cc'd) who is Head of our Green Finance Team?

Thanks

[redacted s 38 -personal information]

Head, International strategy and outreach | Climate Change Division | Directorate for Energy and Climate Change

**T:** +[redacted s 38 -personal information]

**M:** +[redacted s 38 -personal information]

: @ScotGovClimate



**From:** Chris (GEFI) <[redacted s 38 -personal information]@gloablethicalfinance.org>  
**Sent:** 19 May 2020 14:02  
**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Cc:** [redacted s 38 -personal information]@gloablethicalfinance.org  
**Subject:** RE: GEFI - COP26 Intro Call

Hi [redacted s 38 -personal information],

Many thanks for the prompt and positive response!



Shall we go for 10am on Wed 3<sup>rd</sup> June? If that suits please let me know if you would like me to set up a zoom call and I can pop a diary appointment over.

Best regards,

Chris

**From:** [redacted s 38 -personal information]@gov.scot <[redacted s 38 -personal information]@gov.scot>  
**Sent:** 19 May 2020 13:56  
**To:** [redacted s 38 -personal information]@gloablethicalfinance.org  
**Cc:** [redacted s 38 -personal information]@gloablethicalfinance.org  
**Subject:** RE: GEFI - COP26 Intro Call

Hi Chris

Nice to hear from you – and very happy to speak. W/c 01 June works well for me and I can do any time on the 3<sup>rd</sup> in particular if that suits you?

We can do a zoom call if that works?

Best

[redacted s 38 -personal information]

[redacted s 38 -personal information]

Head, International strategy and outreach | Climate Change Division | Directorate for Energy and Climate Change

**T:** +[redacted s 38 -personal information]

**M:** +[redacted s 38 -personal information]

: @ScotGovClimate



**From:** Chris (GEFI) <[redacted s 38 -personal information]@gloablethicalfinance.org>  
**Sent:** 19 May 2020 11:01  
**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Cc:** 'Omar (GEFI)' <[redacted s 38 -personal information]@gloablethicalfinance.org>  
**Subject:** GEFI - COP26 Intro Call

Dear [redacted s 38 -personal information],

I hope you are well during these challenging times.

By way of introduction I work for the Scottish Government-backed Global Ethical Finance Initiative. We are a not-for-profit organisation committed to driving finance for positive change and positioning Scotland as a global leader in ethical finance. Whilst based in Scotland we have a global reach.

Earlier this year our SG sponsor (Colin MacBean) was trying to arrange a call with [redacted s 38 -personal information], [redacted s 38 -personal information] and [redacted s 38 -personal information] (whom I believe is no longer with SG) but for various reasons this has not happened. We are particularly keen to discuss COP26 and [redacted s 38 -personal information] suggested I get in touch with you.

It would be great to schedule a call asap to get an update on SG plans for COP26 and we can share more information on our [www.pathtocop26.com](http://www.pathtocop26.com) campaign, our Finance for Nature Global Summit (Virtual Series) that we are working on with UNDP (see details of SG project) and our conversations with the COP26 team in London.

If that is of interest perhaps you can propose a few days / times over the next week or so (avoiding Friday's) and we can schedule a video call?

Best regards,

Chris

**Chris Tait** | Project Manager



T: +[redacted s 38 -personal information] | M: +[redacted s 38 -personal information]

www.globalethicalfinance.org

\*\*\*\*\*

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10. Email

**From:** Chris Tait <[\[redacted s 38 -personal information\]@todsmurray.com](mailto:[redacted s 38 -personal information]@todsmurray.com)>  
**Sent:** Tuesday, January 21, 2014 1:52 PM  
**To:** [\[redacted s 38 -personal information\] <\[redacted s 38 -personal information\]@scotland.gsi.gov.uk>](mailto:[redacted s 38 -personal information]@scotland.gsi.gov.uk)  
**Subject:** FW: The Future of Ethical Finance in Scotland - An Audience with John Swinney MSP

Hi [\[redacted s 38 -personal information\]](mailto:[redacted s 38 -personal information]),

I hope you are well.

I have been in touch with [\[redacted s 38 -personal information\]](mailto:[redacted s 38 -personal information]) regarding the next IFC Round Table and she has advised me that you did not receive the invite. I am not sure what has happened as you were on the invite list and your email address was correct!

Anyway, details of the event are in the email below and I have also attached an overview of previous events (including the one you attended in Nov).

I hope you are able to join us next month.

Best regards,

Chris

**From:** [redacted s 38 -personal information] [mailto:[redacted s 38 -personal information]@todsmurray.com] **On Behalf Of** [redacted s 38 -personal information]  
**Sent:** 17 January 2014 10:53  
**To:** Chris Tait  
**Cc:** Omar Shaikh (IFC)  
**Subject:** The Future of Ethical Finance in Scotland - An Audience with John Swinney MSP

Good morning,

We have pleasure in inviting you to the latest in the series of Ethical Finance Round Table meetings, hosted by the Islamic Finance Council UK in conjunction with Ken Macintosh MSP and Tods Murray LLP. This will take place on **Thursday 27th February 2014**, from 12.15 to 14.30 at the Scottish Parliament building in Holyrood.

This unique event will provide an opportunity for attendees to discuss the importance of the growing ethical finance sector and the difference this can make to the Scottish economy. The Cabinet Secretary for Finance, Employment and Sustainable Growth, John Swinney will be present to hear views and provide an update on the Scottish Government's economic priorities and how ethical finance may fit within the Scottish Government Banking Strategy. The event will include an opportunity for an exchange of views on ethical finance and to discuss, with Mr Swinney, the possibility of establishing an Ethical Finance Hub, a Scottish Centre of Excellence for ethical finance. Examples of the roles such a Hub could play, which emerged at previous Round Tables, include:

- **Research:** *there are many aspects of ethical finance which would benefit from further research (e.g. the lack of detailed information on the size of the Scottish market).*
- **Business cluster:** *similar to IT innovation centres and silicon glen, act as a base to attract businesses involved in ethical finance to base their operations as part of a cluster of similar firms within the same office building.*
- **International promotion & domestic co-ordination:** *positioning Scotland as destination of choice for global ethical finance player as a hub for conferences, dissemination of thought leadership etc.*
- **Developing standards:** *become a forum to assist in the development and promotion of ethical standards within the financial sector.*

We are especially keen to hear about how your organisation would make use of or would benefit from the establishment of an Ethical Finance Hub - even if you are unable to attend the meeting we would encourage you to provide your comments and feedback to [redacted s 38 -personal information]@todsmurray.com.

We attach a briefing note providing some background on the prior Round Tables. It would be much appreciated if you could confirm whether you would like to attend by Friday 14th February 2014. However, as there is limited availability and we expecting strong interest I would be grateful if you could reply to Chris ASAP. A buffet lunch will be provided from 12.15 with formal proceedings commencing at 12.45.

We hope you will be able to join us for what should be an interesting and engaging event at a very prestigious venue.  
Best regards

**Graham Burnside**  
**Tods Murray Partner & IFC Executive Board Member**  
Ph: [redacted s 38 -personal information]  
Fax: [redacted s 38 -personal information]  
Email: [redacted s 38 -personal information]@todsmurray.com  
Web: www.todsmurray.com  
<<Ethical Finance Round Table Series Rev5.pdf>>

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11. Email

**From:** Chris Tait <[redacted s 38 -personal information]@todsmurray.com>  
**Sent:** Thursday, October 24, 2013 4:06 PM  
**To:** Chris Tait <[redacted s 38 -personal information]@todsmurray.com>  
**Subject:** Invitation - IFC Ethical Finance Round Table 19th Nov 2013

Good afternoon,

We have pleasure in inviting you to the latest in the series of Ethical Finance Round Table meetings hosted by the Islamic Finance Council UK in conjunction with Tods Murray LLP. The meeting will take place between 3pm - 5pm on **Tuesday 19th November 2013** at Tods Murray's Edinburgh office.

Following on from the last successful round table (hosted at the Scottish Parliament by Ken Macintosh MSP) the November meeting will include contributions from ScotWest, GeoCapita, SWIP and others who will be sharing perspectives on the current challenges and opportunities facing credit unions as well as looking at fixed income and equities models for ethical investment in capital markets. There will also be an opportunity for further discussing the Ethical Finance Hub concept which emerged at the last meeting.

I have attached our latest briefing note providing some background on the prior Round Tables.

It would be much appreciated if you could RSVP to me by Friday 8th November 2013. However, as there is limited availability, I would be grateful if you could reply ASAP.

We hope you will be able to join us for what should be another interesting and engaging event.

Best regards,

Chris

<<Islamic Finance Council UK Round Table Series.pdf>>

**Chris Tait**

**For the Islamic Finance Council UK**

DDI: [redacted s 38 -personal information]

Phone: [redacted s 38 -personal information]

Fax: [redacted s 38 -personal information]

Email: [redacted s 38 -personal information].tait@todsmurray.com

Web: www.todsmurray.com

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## 12. Email

**From:** [redacted s 38 -personal information]

**Sent:** Thursday, September 26, 2013 3:41 PM

**To:** 'Chris Tait' <[redacted s 38 -personal information]@todsmurray.com>

**Cc:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>

**Subject:** RE: Islamic Finance Council UK - ethical finance hub

Hello Chris

I just tried to call to have a chat about the meeting.



The meeting seemed to go well, and Mr Swinney seemed genuinely supportive of the concept. It was discussed that an important next step is to begin to flesh out the practicalities of what an ethical finance hub means and how it could actually be delivered.

Mr Swinney suggested that the next roundtable discussion in November would be a good means of progressing the discussion. He is very keen that this is an initiative which is led from those involved on the ground and that it doesn't develop into a government programme. We are of course happy to offer support to help you come up with a workable proposal.

Mr Swinney agreed to attend a roundtable discussion early next year and that this should take place at the Scottish Parliament.

I'm happy to have a discussion about next steps. I will speak to colleagues in my team and will catch up with you next week.

Kind regards

**[redacted s 38 -personal information]**

*[redacted s 38 -personal information]*

*Financial and Business Services Team*

*[redacted s 38 -personal information]*

*Ext [redacted s 38 -personal information]*

*On a Friday, please contact me on [redacted s 38 -personal information]*

5 ATLANTIC QUAY  
150 BROOMIELAW  
GLASGOW G2 8LU

**From:** Chris Tait [mailto:[redacted s 38 -personal information]@todsmurray.com]  
**Sent:** 25 September 2013 14:12  
**To:** [redacted s 38 -personal information]  
**Subject:** RE: Islamic Finance Council UK

Hi [redacted s 38 -personal information],

I had a quick chat with Omar there and he mentioned that you attended this morning's meeting with Mr Swinney. I am sure it was a very interesting discussion!

The feedback from Omar was that it went well and that Mr Swinney seemed to have a genuine interest in the ethical finance, even volunteering to host a future event! We are likely to proceed with our plan to host the next event in Nov with a view to doing something with Mr Swinney in Q1 of next year when, hopefully, things have progressed with the ethical finance hub. While I remember, do please let me know of anyone you feel we should add to our invite list.

Anyway, at this stage I was keen to get your feedback as to how you felt the meeting went, the next steps as you see it and indicative timings. That way I can better understand where we are and ensure expectations are managed!

Best regards,

Chris

---

**From:** [redacted s 38 -personal information]@scotland.gsi.gov.uk [mailto:[redacted s 38 -personal information]@scotland.gsi.gov.uk]  
**Sent:** 06 September 2013 15:10  
**To:** Chris Tait  
**Subject:** RE: Islamic Finance Council UK

Many thanks Chris.

Kind regards

[redacted s 38 -personal information]

*[redacted s 38 -personal information]*

*Financial and Business Services Team*

*[redacted s 38 -personal information]*

*Ex: [redacted s 38 -personal information]*

*On a Friday, please contact me on [redacted s 38 -personal information]*

5 ATLANTIC QUAY  
150 BROOMIELAW  
GLASGOW G2 8LU

**From:** Chris Tait [mailto:[redacted s 38 -personal information]@todsmurray.com]  
**Sent:** 06 September 2013 10:12  
**To:** [redacted s 38 -personal information]  
**Cc:** [redacted s 38 -personal information]  
**Subject:** RE: Islamic Finance Council UK

Morning [redacted s 38 -personal information]

I had a note to get back to you today so the email below was well timed.

For now, the two most appropriate docs would be:

- ETHICAL FINANCE HUB - Letter to Ken Macintosh MSP

- ISLAMIC FINANCE - Conference Press Release.

Best regards,

Chris

---

**From:** [redacted s 38 -personal information]@scotland.gsi.gov.uk [mailto:[redacted s 38 -personal information]@scotland.gsi.gov.uk]

**Sent:** 06 September 2013 10:05  
**To:** Chris Tait  
**Cc:** [redacted s 38 -personal information]@scotland.gsi.gov.uk  
**Subject:** FW: Islamic Finance Council UK

Hello Chris

I have checked with Mr Swinney's private office and can confirm the meeting will take place from 10.30 – 11.30 am in Mr Swinney's office in the Parliament on 25 September.

I will be on annual leave from today until 19 September. I would be grateful if you could send further information as set out below to my colleague [redacted s 38 -personal information] during this time.

Many thanks

[redacted s 38 -personal information][redacted s 38 -personal information]

*[redacted s 38 -personal information]*

*Financial and Business Services Team*

*[redacted s 38 -personal information]*

*Ext [redacted s 38 -personal information]*

*On a Friday, please contact me on [redacted s 38 -personal information]*

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**From:** [redacted s 38 -personal information]  
**Sent:** 30 August 2013 14:41  
**To:** 'Chris Tait'  
**Subject:** RE: Islamic Finance Council UK

Chris

Many thanks for this very comprehensive source of information.

Due to the amount of engagements Mr Swinney attends in one day, **[redacted s 30(b)(i) – free and frank provision of advice]**.

I would therefore find the following most helpful and I have taken the agenda items in turn:

Discussion of Ethical Finance Hub concept

Ideally if you could send me a short, at the most one page background note on the concept of the Ethical Finance Hub, that would be most useful. I can see you have indicated that you will provide an overview of the concept in a word document. This is most likely what I require, but if there are also specific points Graham or Omar wish to discuss with Mr Swinney regarding this concept, I would be grateful if you could indicate these also.

Possibility of a tartan sukuk

I would be grateful if you could provide me with a short background note on this item. Again if you could indicate, specific points Graham or Omar would wish to raise with Mr Swinney, I will focus the briefing accordingly.

I hope this will not cause you too much trouble. Ideally, it would be good if I could receive these by early next week, but I'm very happy to discuss if this is an unsuitable timescale for you.

Kind regards

**[redacted s 38 -personal information]**

*[redacted s 38 -personal information]*

*Financial and Business Services Team*

*[redacted s 38 -personal information]*

*Ext [redacted s 38 -personal information]*

On a Friday, please contact me on *[redacted s 38 -personal information]*

5 ATLANTIC QUAY  
150 BROOMIELAW  
GLASGOW G2 8LU

**From:** Chris Tait [mailto:*[redacted s 38 -personal information]*@todsmurray.com]  
**Sent:** 30 August 2013 10:05  
**To:** *[redacted s 38 -personal information]*  
**Subject:** Islamic Finance Council UK

Hi *[redacted s 38 -personal information]*,

Many thanks for your time earlier and for the link. That is most useful and I will suggest that Graham and Omar, if they have not done so already, read this in advance of the meeting.

I would propose to send a more detailed agenda in due course but, by way of an overview, we would like to:

1. *Discuss the Ethical Finance Hub concept as proposed by members from the roundtable (we will provide an updated briefing note / overview of the concept prior to the meeting - basically adding in the word doc to the pdf as per below).*

2. *Provide an overview of the conclusions from the recent conference to specifically **[redacted s 33(1)(b) – commercial interests]**.*

I have provided a range of documents under various headings which should furnish you with all relevant information so hope it all makes sense. As discussed, please let me know if you have any questions!

**ISLAMIC FINANCE COUNCIL UK AND ISLAMIC FINANCE IN GENERAL (Biogs in the team PDF)**  
<<IFC TEAM SHEET.pdf>> <<Islamic Finance Glossary.pdf>> <<Times Apr 16th - Islamic Finance.pdf>>  
<http://www.ukifc.com/>  
**ETHICAL FINANCE IN SCOTLAND**  
<<Country Could be Ethical Bank Hub - The Herald 21st Feb 2013.pdf>> <<IFC Ethical Round Table Briefing Note - Jan 2013.pdf>> <<Islamic Finance Council UK Rountable 4.doc>> <<IFC Ethical Finance Hub - letter to MSP Ken Macintosh - March15 - FINAL ISSUED.pdf>>

**ETHICAL FINANCE EVENT IN LONDON (Confidential)**

<<IFC Ethical Finance Forum - Shared values between Abrahamic faiths - Briefing Note - DRAFT.pdf>> <<IFC Ethical Finance Forum - INVITE 24 Sept 13.pdf>>

**ISLAMIC FINANCE COUNCIL UK INFRASTRUCTURE CONFERENCE**

<<IFC - Infrastructure and Renewables Conference E-INVITATION.pdf>> <<IFC Conference Brochure v2.pdf>> <<IFC Conference June 2013 Media Coverage.pdf>>

<http://thinkandtalkwithtods.com/2013/08/19/bbc-radio-scotland-interview-tods-graham-burnside/>

Best regards,

Chris

**Chris Tait - Marketing and Business Development Executive  
For Tods Murray LLP**

DDI: [redacted s 38 -personal information]

Phone: [redacted s 38 -personal information]

Fax: [redacted s 38 -personal information]

Email: [redacted s 38 -personal information]@todsmurray.com

Web: [www.todsmurray.com](http://www.todsmurray.com)

LinkedIn: Chris Tait

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Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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13. Invitation

Minister for Europe and International Development  
Humza Yousaf MSP



T: [redacted s 38 -personal information]

The Most Revd. And Rt Hon. Justin Welby  
Archbishop of Canterbury  
Lambeth Palace  
London  
SE1 7JU



May 2015

[Your Grace,]

**Invitation to participate in the Global Ethical Finance Forum 2015**

It is my distinct pleasure to personally invite Your Grace to the 1<sup>st</sup> Global Ethical Finance Forum (GEFF) on the 1<sup>st</sup> and 2<sup>nd</sup> of September 2015. The event has been timed to complement the launch of the Responsible Finance Institute (RFI) on the 31<sup>st</sup> August 2015 and Thomson Reuters' Responsible Finance Report on the 2<sup>nd</sup> of September 2015.

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**HUMZA YOUSAF**

Minister for Europe and International Development

Humza Yousaf MSP



T: [redacted s 38 -personal information]

[redacted s 38 -personal information]

Governor

Central Bank of Kuwait

Head Office

PO Box 526

Safat 13006



May 2015

[Your Excellency]

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T: [redacted s 38 -personal information]

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Governor

Central Bank of Bahrain

Manama

PO Box 27

Kingdom of Bahrain



May 2015

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Chief Executive Officer

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PJSC Building

Al Maktoum Road

Port Saeed Area



May 2015

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General Counsel, Executive Vice President Legal Group

Head Office

Federal Reserve Bank of New York

33 Liberty Street

New York



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Chair of the PRI Advisory Council

The Principles for Responsible Investment

5<sup>th</sup> Floor

25 Camperdown Street

London

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T: [redacted s 38 -personal information]

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Managing Director, Head of ESG

State Street Global Advisors

One Lincoln Street

State Street Financial Center

Boston MA 02111-2900



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Americas Head, Corporate Governance and Responsible Investment

BlackRock

55 East 52<sup>nd</sup> Street

New York

NY 10055



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Managing Director

Crescent Wealth

Sydney Headquarters

Level 6, 71 Macquarie St

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Laurence A Tisch Professor of History

Harvard University

Center for European Studies

Room 124, 27 Kirkland Street

Cambridge MA 02138



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Group Chief Executive Officer

Noor Investment Group LLC

Downtown Dubai

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Building No 1, Level 8



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Professor of Management Practice

Harvard Business School

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Secretary General

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Secretary General

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Director of International Activities

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**HUMZA YOUSAF**

Minister for Europe and International Development

Humza Yousaf MSP



T: [redacted s 38 -personal information]

[redacted s 38 -personal information]

Senior Advisor to the Group Chairman and Group Chief Executive

HSBC holdings

HSBC Bank plc

8 Canada Square

London



May 2015

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Minister for Europe and International Development

Humza Yousaf MSP



T: [redacted s 38 -personal information]

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President

Islamic Development Bank

Qasr Khuzam Street

5925

Jeddah



May 2015

[Your Excellency]

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Minister for Europe and International Development

Humza Yousaf MSP



T: [redacted s 38 -personal information]

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Director, The Earth Institute

Columbia University

314 Low Library

535 West 116<sup>th</sup> Street

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May 2015

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Minister for Europe and International Development

Humza Yousaf MSP



T: [redacted s 38 -personal information]

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President and Chief Executive Officer

Pax World Mutual Funds

30 Penhallow Street

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JPortsmouth, NH 03801



May 2015

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Humza Yousaf MSP



T: [redacted s 38 -personal information]

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Chief Executive Officer

Triodos Bank

Deanery Road

Bristol

BS1 5AS



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Minister for Europe and International Development

Humza Yousaf MSP



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Chief Executive Officer

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May 2015

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Head, Derivatives and Structured Finance

The World Bank

1818 H Street, NW

Washington DC 20433

USA



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Managing Director

Principles for Responsible Investment

5<sup>th</sup> Floor

25 Camperdown Street

London



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Humza Yousaf MSP



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Senior Fellow

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Harvard University

Room 102

The Bekfer Building



By email: [redacted s 38 -personal information]@hks.harvard.edu

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Chief Executive

Prudential Regulation Authority

20 Moorgate

London

EC2R 6DA



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Managing Director

Vanguard Asset Management

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Jeddah



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Chief Executive Officer

Hermes Investment Management

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1 Portsoken Street

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Minister for Europe and International Development

Humza Yousaf MSP



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President

Coalition for Environmentally Responsible Economies

99 Chauncy Street

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Boston. MA 02111



May 2015



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**HUMZA YOUSAF**

14. Invitations

Minister for Europe and International Development

Humza Yousaf MSP



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Chief Executive Officer

Arabesque Asset Management Ltd

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May 2015

**Invitation to participate in the Global Ethical Finance Forum 2015**

It is my distinct pleasure to personally invite you to the 1<sup>st</sup> Global Ethical Finance Forum (GEFF) on the 1<sup>st</sup> and 2<sup>nd</sup> of September 2015. The event has been timed to complement the launch of the Responsible Finance Institute (RFI) on the 31<sup>st</sup> August 2015 and Thomson Reuters' Responsible Finance Report on the 2<sup>nd</sup> of September 2015. We are delighted these events are being held in Scotland at the prestigious Balmoral Hotel in Edinburgh and I would like to extend our invitation for you to join me for a civic reception to be held in the Great Hall of Edinburgh Castle on the evening of the 2<sup>nd</sup> September 2015.

Following the global financial crisis, there has been an increased recognition that ethics and business are central to the attainment of sustainable and inclusive economic growth. This idea has been at the heart of the socially responsible finance movement and the GEFF will offer a unique forum for the progression of this agenda.

Scotland's heritage highlights our significant contribution to the broader ethical finance movement via the growth of the savings bank, mutual life companies and indeed the work of moral philosopher and economist Adam Smith. Accordingly I welcome the organisers, and their partners, the Islamic Finance Council UK (IFC), decision to host the GEFF 2015 in Scotland. The IFC Edinburgh roundtable series have highlighted that real synergies exist between Islamic and ethical finance and the RFI very

aply aims to connect these areas by bringing together a broad range of stakeholders to address the scope for convergence around 'fairer' and socially responsible finance.

In line with our commitment to develop ethical finance, the Scottish Government looks forward to welcoming you to Edinburgh. My colleague John Swinney MSP Deputy First Minister and Cabinet Secretary for Finance, Constitution and Economy will join you at the RFI launch and I will be hosting the reception in Edinburgh Castle, one of Scotland's most iconic buildings. Furthermore, for our VVIPs, we will host a relaxing and enjoyable tour which will provide you with an opportunity to see more of our beautiful country on the 31<sup>st</sup> August.

The organisers will further communicate the specific details of your speech.

We hope that you will join us and share your insights in this effort to foster global collaboration among various areas of responsible finance towards creating a fairer society.

**HUMZA YOUSAF**

Minister for Europe and International Development

Humza Yousaf MSP



T: [redacted s 38 -personal information]

[redacted s 38 -personal information]

Emir of Kano

Central Bank of Nigeria

Plot 33, Abubakar Tafawa Balewa Way

Central Business District

Cadastral Zone



By email: [redacted s 38 -personal information]@gmail.com

May 2015

### **Invitation to participate in the Global Ethical Finance Forum 2015**

It is my distinct pleasure to personally invite Your Royal Highness to the 1<sup>st</sup> Global Ethical Finance Forum (GEFF) on the 1<sup>st</sup> and 2<sup>nd</sup> of September 2015. The event has been timed to complement the launch of the Responsible Finance Institute (RFI) on the 31<sup>st</sup> August 2015 and Thomson Reuters' Responsible Finance Report on the 2<sup>nd</sup> of September 2015. We are delighted these events are being held in Scotland at the prestigious Balmoral Hotel in Edinburgh and I would like to extend our invitation for you to join me for a civic reception to be held in the Great Hall of Edinburgh Castle on the evening of the 2<sup>nd</sup> September 2015.

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**HUMZA YOUSAF**

Minister for Europe and International Development

Humza Yousaf MSP



T: [redacted s 38 -personal information]

[redacted s 38 -personal information]

Chief Executive Officer

Al Rayan Bank

Edgbaston House

Duchess Place

Birmingham



By email: [redacted s 38 -personal information]@alrayanbank.co.uk

May 2015

**Invitation to participate in the Global Ethical Finance Forum 2015**

It is my distinct pleasure to personally invite you to the 1<sup>st</sup> Global Ethical Finance Forum (GEFF) on the 1<sup>st</sup> and 2<sup>nd</sup> of September 2015. The event has been timed to complement the launch of the Responsible Finance Institute (RFI) on the 31<sup>st</sup> August 2015 and Thomson Reuters' Responsible Finance Report on the 2<sup>nd</sup> of September 2015. We are delighted these events are being held in Scotland at the prestigious Balmoral Hotel in Edinburgh and I would like to extend our invitation for you to join me for a civic reception to be held in the Great Hall of Edinburgh Castle on the evening of the 2<sup>nd</sup> September 2015.

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The organisers will further communicate the specific details of your speech.

We hope that you will join us and share your insights in this effort to foster global collaboration among various areas of responsible finance towards creating a fairer society.

**HUMZA YOUSAF**

15. Invitation

From: **[redacted s 38 -personal information]**  
Sent: 10 January 2017 16:11:26  
To: Public Engagement Unit  
Subject: FW: Edinburgh Ethical Finance Round Table Invitation - 28th February 2017

For MACCS ? diary case. S

**[redacted s 38 -personal information]** | Private Secretary to Keith Brown MSP, Cabinet Secretary for Economy, Jobs and Fair Work  
The Scottish Government | St Andrew's House, Edinburgh, EH1 3DG | Web: [www.gov.scot](http://www.gov.scot)  
Tel: **[redacted s 38 -personal information]** | Mob: **[redacted s 38 -personal information]**  
| Email: [CabSecEJFW@gov.scot](mailto:CabSecEJFW@gov.scot)

From: Chris Tait [[mailto:\[redacted s 38 -personal information\]=ukifc.com@mail180.wdc02.mcdlv.net](mailto:[redacted s 38 -personal information]=ukifc.com@mail180.wdc02.mcdlv.net)] On Behalf Of Chris Tait  
Sent: 10 January 2017 15:36  
To: Cabinet Secretary for Economy, Jobs and Fair Work  
Subject: Edinburgh Ethical Finance Round Table Invitation - 28th February 2017  
Your invitation to attend the UK's leading ethical finance discussion platform seeking to promote a 'fairer' and more socially responsible financial sector.

[<https://gallery.mailchimp.com/e3c2b1dd990bc7eb5e3ccbfea/images/1ad714cc-628a-471a-a784-d66ac048c6e1.jpg>]

Dear Keith,

We have pleasure in inviting you to the latest in the award winning<<http://ukifc.us12.list-manage1.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=a8911dd461&e=d03c86111b>> series of the Edinburgh Ethical Finance Round Table meetings organised by the Islamic Finance Council UK

<<http://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=1aa6dcbc70&e=d03c86111b>> in conjunction with Maclay Murray & Spens LLP<<http://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=6b5baa8bb2&e=d03c86111b>> (MMS).

Our last Round Table focused on investment for social purpose with key insights shared by RBS (**[redacted s 38 -personal information]**) and Social Investment Scotland (**[redacted s 38 -personal information]**). The session explored how mainstream banks and social investors can ? and increasingly do ? provide complementary support to social sector organisations and the finance they need to flourish. Within the ensuing discussion the theme of measuring impact emerged and this will be the topic of the forthcoming event as detailed below:

DATE

Tuesday 28th February 2017

16. Invitation response

Cabinet Secretary for Economy, Jobs and Fair Work

Keith Brown MSP



Scottish Government  
Riaghaltas na h-Alba  
gov.scot

T: **[redacted s 38 -personal information]**

Mr Chris Tait

Islamic Finance Council

2 Fitzroy Place

GLASGOW

G3 7RH

Our ref: 2017/0001457

January 2017

Dear Mr Tait

Thank you for your email of 10 January 2017 inviting Keith Brown, MSP, Cabinet Secretary for Economy, Jobs and Fair Work to the Edinburgh Ethical Finance Round Table meeting on 28 February 2017.

Mr Brown would be delighted to attend. I would be grateful if you could contact Mr Brown's Diary Secretary, [redacted s 38 -personal information], at CabSecEJFW@gov.scot to make the necessary arrangements.

Yours sincerely

[REDACTED S 38 -PERSONAL INFORMATION]

Private Secretary

17. Invitation

From: [redacted s 38 -personal information]  
Sent: 03 May 2018 13:19:14  
To: Public Engagement Unit  
Cc: Minister for Business, Innovation and Energy  
Subject: FW: \*Invitation\* Edinburgh Ethical Finance Round Table (18th June 2018) and Staying in Touch?(GDPR)

For MACCS please.

Private Secretary / Minister for Business, Innovation and Energy  
? [redacted s 38 -personal information] | Mobile: [redacted s 38 -personal information] |  
Email:  
ministerbie@gov.scot<mailto:ministerbie@gov.scot> |  
Antonia.Farrell@gov.scot<mailto:Antonia.Farrell@gov.scot> 2N.08 St  
Andrew's House | Regent Road | Edinburgh | EH1 3DG



All e-mails and attachments sent by a Ministerial Private Office to any other official on behalf of a Minister relating to a decision, request or comment made by a Minister, or a note of a Ministerial meeting, must be filed appropriately by the recipient. Private Offices do not keep official records of such e-mails or attachments.

Scottish Ministers, Special advisers and the Permanent Secretary are covered by the terms of the Lobbying (Scotland) Act 2016. See [www.lobbying.scot](http://www.lobbying.scot)<<http://www.lobbying.scot>>

From: Omar Shaikh | UKIFC [mailto:omar=ukifc.com@mail196.atl21.rsgsv.net] On Behalf Of Omar Shaikh | UKIFC  
Sent: 03 May 2018 12:27  
To: Minister for Business, Innovation and Energy  
Subject: \*Invitation\* Edinburgh Ethical Finance Round Table (18th June 2018) and Staying in Touch (GDPR)

Your invitation to attend the UK's leading ethical finance discussion platform seeking to promote a 'fairer' and more socially responsible financial sector.

[<https://gallery.mailchimp.com/e3c2b1dd990bc7eb5e3ccbfea/images/5b6b183d-1034-4e53-964e-3467b242c526.png>]

Dear Paul,

We have pleasure in inviting you to the next Edinburgh Ethical Finance Round Table hosted by Baillie Gifford<<https://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=4b40a30346&e=df552ec059>> exploring how the Scottish and Irish Governments are engaging with the financial services sector to deliver stronger, sustainable and inclusive economies.

Scotland's Economic Strategy identifies investment, innovation, inclusive growth and internationalisation as the priority areas that will inform future policy. At the next round table we will hear from and discuss this strategy with Scottish Government, understand some of the key initiatives under way within the financial services sector and debate the role of ethical finance.

We will also get an insight into a flagship financial services initiative set up by the Irish Government. Sustainable Nation Ireland<<https://ukifc.us12.list->

18. Invitation response

Minister for Business, Innovation and Energy  
Paul Wheelhouse MSP



vernment

Scottish Go  
Riaghaltas na h-Alb  
gov.scot

T: [redacted s 38 -personal information]

Mr Chris Tait  
Islamic Finance Council UK

By email - [redacted s 38 -personal  
information]@ukifc.com

Our ref: 2018/0015067

11 May 2018

Dear Mr Tait

Thank you for your email of inviting Paul Wheelhouse, Minister for Business Innovation and Energy to the Edinburgh Ethical Finance Round Table on 18 June 2018.

The Minister would be delighted to accept your invitation and has asked that you contact his Diary Secretary, [redacted s 38 -personal information] on [redacted s 38 -personal information] or by email to Ministerbie@gov.scot to make the necessary arrangements.

Yours sincerely

[redacted s 38 -personal information]

PRIVATE SECRETARY

19. Invitation

From: [redacted s 38 -personal information]  
Sent: 06 October 2017 14:24:22  
To: Public Engagement Unit  
Subject: FW: \*Invitation\* Edinburgh Ethical Finance Round Table on UN  
SDG's??(13th Nov 2017)

For MACCS- MR

From: Chris Tait [mailto:[redacted s 38 -personal information]=ukifc.com@mail96.atl91.mcsv.net] On Behalf Of Chris Tait

Sent: 06 October 2017 12:34

To: Cabinet Secretary for Economy, Jobs and Fair Work

Subject: \*Invitation\* Edinburgh Ethical Finance Round Table on UN SDG's (13th Nov 2017)

Your invitation to attend the UK's leading ethical finance discussion platform seeking to promote a 'fairer' and more socially responsible financial sector.

[https://gallery.mailchimp.com/e3c2b1dd990bc7eb5e3ccbfea/images/5b6b183d-1034-4e53-964e-3467b242c526.png]

Dear Keith,

We are have pleasure in inviting you to the latest in the award winning

<<http://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=8dad696544&e=d03c86111b>> series of the Edinburgh Ethical Finance Round Table meetings organised by the Islamic Finance Council UK<<http://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=925f5a3e9d&e=d03c86111b>> (UKIFC) in partnership with our new hosts Baillie Gifford<<http://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=674549c68b&e=d03c86111b>>.

The next round table on Monday 13th November will focus on the implication of UN SDGs on your organisation.

At the last meeting, faith-based finance was discussed with views and insights shared by [redacted s 38 -personal information] (chair of the trustees of the Church of Scotland Investors Trust) and [redacted s 38 -personal information] (Senior Sales Manager) at Al Rayan Bank, the UK's largest Islamic bank.

The focus of our next event will be on the UN Sustainable Development Goals and details are provided below:

DATE

Monday 13th November 2017

TIMINGS

12pm - 2pm (a buffet lunch will be available from 12pm - 12.20pm)

20. Invitation

From: [redacted s 38 -personal information]

Sent: 16 January 2018 11:11:21

To: Public Engagement Unit  
Cc: Minister for Business, Innovation and Energy  
Subject: FW: \*Invitation\* Edinburgh Ethical Finance Round Table on Millennial Perspectives in Finance (26th Feb 2018)

For MACCS please.  
Private Secretary / Minister for Business, Innovation and Energy  
? [redacted s 38 -personal information] | Mobile: [redacted s 38 -personal information] |  
Email:  
ministerbie@gov.scot<mailto:ministerbie@gov.scot> |

[redacted s 38 -personal information]@gov.scot<mailto:[redacted s 38 -personal information]@gov.scot> 2N.08 St Andrew's House |  
Regent Road | Edinburgh | EH1 3DG

All e-mails and attachments sent by a Ministerial Private Office to another official on behalf of a Minister relating to a decision, request or comment made by a Minister, or a note of a Ministerial meeting, must be filed appropriately by the recipient. Private Offices do not keep official records of such e-mails or attachments. Thank you.

From: Chris Tait [mailto:[redacted s 38 -personal information]=ukifc.com@mail124.sea21.rsgsv.net] On Behalf Of Chris Tait  
Sent: 16 January 2018 10:54  
To: Minister for Business, Innovation and Energy  
Subject: \*Invitation\* Edinburgh Ethical Finance Round Table on Millennial Perspectives in Finance (26th Feb 2018)

Your invitation to attend the UK's leading ethical finance discussion platform seeking to promote a fairer and more socially responsible financial sector.

[<https://gallery.mailchimp.com/e3c2b1dd990bc7eb5e3ccbfea/images/5b6b183d-1034-4e53-964e-3467b242c526.png>]

Dear Paul,

We are have pleasure in inviting you to the latest in the award winning <<https://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=e3a9637861&e=df552ec059>> series of the Edinburgh Ethical Finance Round Table meetings organised by the Islamic Finance Council UK <<https://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=b219377257&e=df552ec059>> (UKIFC) in partnership with Baillie Gifford <<https://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=7fcc96ddfd&e=df552ec059>>.

Former UNEP Chairman Lawrence Bloom noted over the next 25 years, 32 trillion dollars, the greatest transfer of wealth in the history of the world, will pass from one

generation to another and investment decisions are a way for millennials to express their social, political, and environmental values.? (see article<<https://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=4158ca0d1a&e=df552ec059>>).

We would appreciate if you could confirm to us your decision to attend or not at your earliest possible convenience.

21. Invitation response

Minister for Business, Innovation and Energy  
Paul Wheelhouse MSP



Scottish Go  
Riaghaltas na h-Alba  
gov.scot  
vernment

T: [redacted s 38 -personal information]

Mr Chris Tait

By email - [redacted s 38 -personal information]@ukifc.com

Our ref: 2018/0001754

February 2018

Dear Mr Tait.

Thank you for your email of 16 January 2018, inviting the Minister for Business, Innovation and Energy, Paul Wheelhouse MSP, to attend the forthcoming Edinburgh Ethical Finance Round Table meeting.

Unfortunately, due to an already heavily committed diary, the Minister will not be able to accept your kind invitation. He has, however, asked me to pass on his best wishes for a successful event.

Yours sincerely

[redacted s 38 -personal information]

Private Secretary

22. Invitation

From: [redacted s 38 -personal information]  
Sent: 23 February 2017 14:51:34  
To: Public Engagement Unit  
Subject: FW: Note on ongoing financial services projects  
Attachments: Letter to John Swinney - 21st Feb 2017.pdf

Hi,

For MACCs please.

Thanks,

[redacted s 38 -personal information]

[redacted s 38 -personal information] | Assistant Private Secretary (Correspondence) to John Swinney MSP | Deputy First Minister of Scotland and Cabinet Secretary for Education and Skills | Scottish Government | St Andrew's House | Edinburgh | EH1 3DG | T: [redacted s 38 -personal information]  
| E: DFMCSSE@gov.scot<mailto:DFMCSE@gov.scot>

All e-mails and attachments sent by a Ministerial Private Office to another official on behalf of a Minister relating to a decision, request or comment made by a Minister, or a note of a Ministerial meeting, must be filed appropriately by the primary recipient. Private Offices do not keep official records of such e-mails or attachments.

From: Public Engagement Unit Sent: 22 February 2017 09:26  
To: Deputy First Minister and Cabinet Secretary for Education and Skills Subject: FW: Note on ongoing financial services projects

Hi,  
DFM correspondence for your information. Thanks

[redacted s 38 -personal information]  
Public Engagement Officer | Ext: [redacted s 38 -personal information] | \* [redacted s 38 -personal information]@gov.scot ST.ANDREWS HOUSE | REGENT ROAD | EDINBURGH | EH1 3DG |  
[cid:image001.png@01D0C2DC.C2742690]Public Engagement Unit  
Ministerial Private Office

From: [redacted s 38 -personal information] [mailto:[redacted s 38 -personal information]@hw.ac.uk] Sent: 21 February 2017 17:54  
To: Scottish Ministers

Subject: Note on ongoing financial services projects

Good evening,

I have attached a short note for the Deputy First Minister, outlining some progress made on a variety of projects, and inviting him to consider how the Scottish Government might consider its engagement with these.

I should be obliged were you to pass this on to him.

23. Response

Local Government and Communities  
Directorate



Scottish Government  
Riaghaltas na h-Alba  
gov.scot

Equality, Human Rights and Third Sector Division

[REDACTED S 38 -PERSONAL INFORMATION]

E: [redacted s 38 -personal  
information]@gov.scot

[redacted s 38 -personal information]

[redacted s 38 -personal information]

School of Social Sciences

Heriot-Watt University

Riccarton

Edinburgh

---

Our ref: 2017/0007487

March 2017

Dr Mochrie

Thank you for your letter of 21 February 2017 in which you offered to meet with the Deputy First Minister and Cabinet Secretary for Education and Skills, John Swinney, to discuss a proposal which aims to contribute to three current projects around ethical financial services.

Mr Swinney would be delighted to meet with you, subject to parliamentary business. I would be grateful if you could liaise with his Diary Secretary, [redacted s 38 -personal information] (DFMCSE@gov.scot), to make the necessary arrangements.

[REDACTED S 38 -PERSONAL INFORMATION]

PRIVATE SECRETARY

24. Invitation

From: [redacted s 38 -personal information]  
Sent: 05 June 2019 15:37:05  
To: Public Engagement Unit  
Cc: Minister for Public Finance and Digital Economy  
Subject: FW: Masterclass - Creating an Ethical Pension Portfolio (19 June, Edinburgh)

[redacted s 38 -  
personal  
information]

Hi

Can you please add to MACCs as a diary case for Ms Forbes, it will be a decline to attend workshop as diary is already full on that day.

Regards

[redacted s 38 -personal information]  
Assistant Private Secretary to Kate Forbes MSP Minister for  
Public Finance and Digital Economy  
4N.11 | St Andrew's House | Regent Road | Edinburgh | EH1 3DG Tel:  
[redacted s 38 -personal information]

Please check our updated Ministerial Preferences<<http://saltire/my-workplace/ministerial-preferences-and-support/Finance-Economy-and-Fair-Work/Pages/Minister-for-Public-Finance-and-Digital-Economy.aspx>>

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From: [redacted s 38 -personal information]@ethicalfinancehub.org<mailto:[redacted s 38 -personal information]@ethicalfinancehub.org>  
<[redacted s 38 -personal information]@ethicalfinancehub.org<mailto:[redacted s 38 -personal information]@ethicalfinancehub.org>> Sent: 05 June 2019 09:19  
To: Beamish C (Claudia), MSP  
<Claudia.Beamish.msp@parliament.scot<mailto:Claudia.Beamish.msp@parliament.scot>>; Cole-Hamilton A (Alex), MSP <Alex.Cole-Hamilton.msp@parliament.scot<mailto:Alex.Cole-Hamilton.msp@parliament.scot>>; Johnstone A (Alison), MSP  
<Alison.Johnstone.msp@parliament.scot<mailto:Alison.Johnstone.msp@parliament.scot>>  
Cc: Harvie P (Patrick), MSP  
<Patrick.Harvie.msp@parliament.scot<mailto:Patrick.Harvie.msp@parliament.scot>>; Forbes K (Kate), MSP  
<Kate.Forbes.msp@parliament.scot<mailto:Kate.Forbes.msp@parliament.scot>> Subject: Masterclass - Creating an Ethical Pension Portfolio (19 June, Edinburgh)

Morning all,

I hope that you do not mind me getting in touch.

I read with interest this week about your campaigning for Scottish Government pensions to come from "ethical investments" rather than fossil fuel companies. I work for Scottish Government-backed Ethical Finance Hub and wanted to invite you, as well as pension fund trustees, to attend our Asset Owner Approaches to Responsible Fund Selection course taking place in Edinburgh on Wednesday 19th June 2019.

It will be delivered by JB Beckett (ex Fund Selector at Scottish Widows) and will provide an insight and guidance as to how you can transition to a more sustainable portfolio. Please share with interested colleagues. Beyond this we would be happy to meet with you / trustees to discuss further.

Best regards,

Chris

Chris Tait | Project Manager M: +[redacted s 38 -personal information]

25. Response

Ministear airson Ionmhas Poblach agus  
Eaconomaidh Dhìseatach

Ceit Fhoirbheis BPA

Minister for Public Finance and Digital Economy



vernment

Scottish Go  
Riaghaltas na h-Alba  
gov.scot

Kate Forbes MSP

T: [redacted s 38 -personal information]

Mr Chris Tait

[redacted s 38 -personal  
information]@ethicalfinancehub.org

Our ref: 2019/0017074

11 June 2019

Dear Mr Tait

Thank you for your email of 5 June inviting the Minister for Public Finance and Digital Economy, Kate Forbes MSP to attend your forthcoming event, Masterclass – Creating an Ethical Pension Portfolio.

Ms Forbes very much appreciates your kind invitation but due to an already heavily committed diary, must decline. She has, however, asked me to pass on her best wishes for a successful event.

Yours sincerely

[REDACTED S 38 -PERSONAL INFORMATION]

PRIVATE SECRETARY

26. Invitation

**From:** Central Enquiry Unit

**Sent:** Monday, September 24, 2018 11:12 AM

**To:** DG Economy <DGEconomy@gov.scot>

**Subject:** E - \*Liz - Private Invitations\* Ethical Finance Week (22-25 Oct, Edi) - Omar Shaikh

**Importance:** High

Good morning

The email enquiry below was received at the Central Enquiry Unit today.

I would be grateful if you would deal with this or forward it to the appropriate person / area of business.

You may wish to acknowledge receipt of this email to the enquirer.

Thank you

**[redacted s 38 -personal information]**

Central Enquiry Unit

Ext **[redacted s 38 -personal information]**

Reminder: If this email contains a request for information please remember that the Scottish Government is required to respond to all requests for information including e-mails, within 20 working days of receipt in accordance with the Freedom of Information (Scotland) Act. Please refer to the FOI Guidance. All FOI requests received must be registered on the FOI Tracker.

All FOI responses where information is released must be emailed to the FOI Unit immediately after issue, with 'FOI/EIRs TO PUBLISH' in the subject line

If the request is sensitive, it will require Ministerial clearance. Guidance on this is available at Steps 33 and 34 of the Step-by-Step Guide to Handling FOI/EIRs Requests.

If the request is from a journalist, responses should be issued by the relevant communications team



**From:** Omar Shaikh | UKIFC <**[redacted s 38 -personal information]**@ukifc.com>

**Sent:** 24 September 2018 10:37

**To:** Central Enquiry Unit <CEU@gov.scot>

**Cc:** **[redacted s 38 -personal information]**@ukifc.com

**Subject:** \*Liz - Private Invitations\* Ethical Finance Week (22-25 Oct, Edi)  
**Importance:** High

Dear [redacted s 38 -personal information],

I trust you are well.

I wanted to send you a personal follow-up to the email below that details our plans for a week of ethical finance events taking place in Edinburgh next month.

Given your interest in our work in ethical finance I would like to invite you, as our guest, to the following events taking place during the festival:

<b>Ethical Finance 2018</b>	0900 – 1700 Monday 22nd – Tuesday 23rd October 2018  RBS Conference Centre	Complimentary Pass	<b>[redacted s 33(1)(b) – commercial interest]</b>  <i>A separate invitation will come from Scottish Government for the Reception in Edinburgh Castle on 22<sup>nd</sup> Oct.</i>
<b>Edinburgh Finance Declaration Celebratory Dinner</b>	1830 - 2130  Tuesday 23rd October 2018  Greyfriars Kirk, Edinburgh	Private Invitation	Please see the attached invitation and let me/Chris know asap if you wish to join.
<b>Edinburgh Ethical Finance Round Table - The Role of Blended Finance for the SDGs</b>	1345 - 1600  Wednesday 24th October 2018  Scottish Parliament, Edinburgh	Private Invitation	Please see the attached invitation and let me/Chris know asap if you wish to join.

Kindly **RSVP by Friday 5<sup>th</sup> October 2018** and we do hope that you are able to join us in October.

Best,

Omar Shaikh

[Advisory Board Member](#)



T: +[redacted s 38 -personal information]  
M: +[redacted s 38 -personal information]

www.ukifc.com

\*\*\*\*\*

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**From:** Chris Tait| **On Behalf Of** Chris Tait| UKIFC  
**Sent:** 13 September 2018 10:30  
**To:**  
**Subject:** Ethical Finance Week, Edinburgh, 22nd - 25th October 2018

**As part of the Global Ethical Finance Initiative Edinburgh will host a series of events between 22nd and 25th October 2018 and we would encourage you to get involved!**



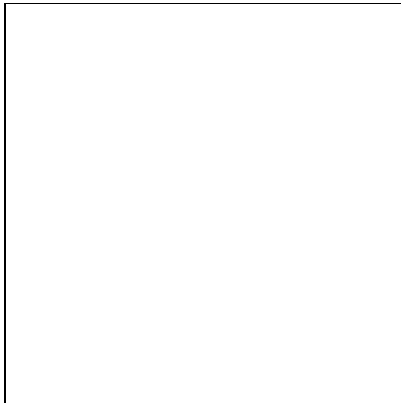
Dear Chris,

As part of the Global Ethical Finance Initiative international leaders in ethical finance will be convening in Edinburgh at Ethical Finance 2018 taking place on 22nd - 23rd October 2018. The conference will be delivered in partnership with United Nations Development Programme (UNDP), Scottish Government and RBS.

Ethical Finance 2018 will explore themes including regaining trust in financial institutions, measuring impact, aligning capital to the UN Sustainable Development Goals (SDGs) and the \$7trn demand for ethical investment products from faith and philanthropy groups.

The conference forms part of a wider ethical finance week that includes a series of events, organised and supported by Baillie Gifford, Church of Scotland, The Institute of Chartered Accountants of Scotland (ICAS), Ethical Finance Hub and the Financial Innovation Lab, that will take place in Edinburgh between the 22nd - 25th October 2018.

Please see below for details.



**ETHICAL FINANCE 2018\***

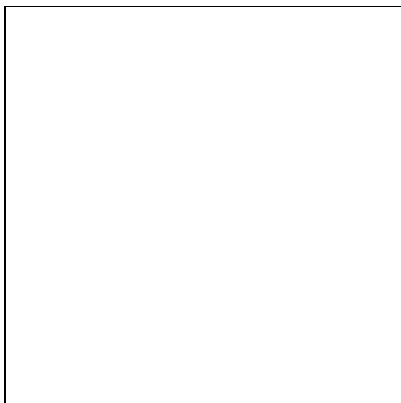
9am - 5pm, 22nd - 23rd October 2018

RBS Conference Centre, Edinburgh

Delivered in partnership with Scottish Government, UNDP, Responsible Investor and RBS

[www.ethicalfinance2018.com](http://www.ethicalfinance2018.com)

*\*includes an evening reception at Edinburgh Castle (6.30pm - 8.30pm, 22nd October 2018)*



**CELEBRATORY DINNER**

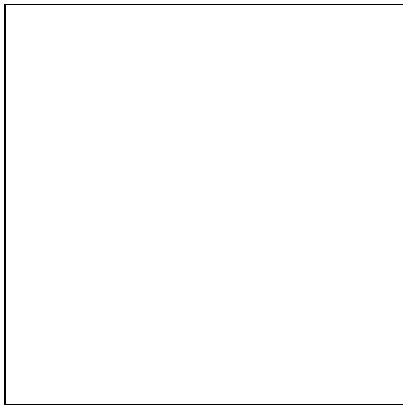
7pm - 9.30pm, 23rd October 2018

Greyfriars Kirk, Edinburgh

Hosted by Church of Scotland in partnership with UKIFC

Further information

[www.globalethicalfinance.org/edinburgh-declaration/](http://www.globalethicalfinance.org/edinburgh-declaration/)



**UNDP ROUND TABLE: ROLE OF BLENDED FINANCE FOR THE SDGs**

1.45pm - 4pm, 24th October 2018

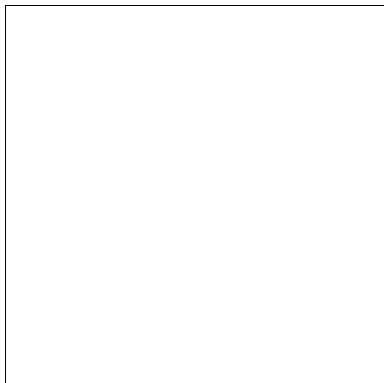
The Scottish Parliament, Edinburgh

Hosted by Scottish Government in partnership with UNDP and Baillie Gifford

Further information

[Ethical Finance Round Table Overview](#)

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**IDEATION EVENT**

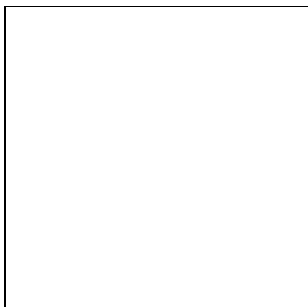
10.30am - 4pm, 25th October 2018

Foundation Scotland, Edinburgh

Hosted by the Finance Innovation Lab

Register your interest in attending by emailing **[redacted s 38 -personal information]**@financeinnovationlab.org

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**SUSTAINABLE FINANCE DISCUSSION**

6pm - 8pm, 25th October 2018

CA House, Edinburgh

Hosted by ICAS in partnership with Ethical Finance Hub

Further Information

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Over the past 8 years, along with our partners, the UKIFC has pioneered and developed a number of ethical finance initiatives in Edinburgh. Moving forward, these activities are being consolidated under one neutral umbrella - Global Ethical Finance Initiative (GEFI) - which aims to create a compelling proposition that positions Scotland as the "Davos" of ethical finance.

We believe Scotland is well positioned to become a global leader in ethical finance by facilitating dialogue and enabling innovative businesses, initiatives and thinking. To do so we welcome your participation and support so please come along to the Ethical Finance Week events and feel free to share with colleagues and associates.

If you wish to discuss the new Global Ethical Finance Initiative in more detail please do not hesitate to get in touch.

Best regards,

Chris

Project Manager

UKIFC

Office: +[redacted s 38 -personal information]

Mobile: +[redacted s 38 -personal information]

[www.ukifc.com](http://www.ukifc.com)

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We are getting in touch as a follow-up to your previous engagement with the UKIFC (i.e. event, initiatives, thought leadership report or meeting our team).



**Our mailing address is:**

Islamic Finance Council UK  
Bellahouston Business Centre  
Glasgow, Glasgow G51 1PZ  
United Kingdom

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27. Invitation

**INVITATION**



# ETHICAL FINANCE ROUND TABLE EDINBURGH

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## ROLE OF BLENDED FINANCE FOR SDGs

**Date:** Wednesday 24<sup>th</sup> October 2018

**Time:** 1.45pm to 4pm (please allow additional 20mins on arrival for security)

**Venue:** Committee Room 1, Scottish Parliament, Holyrood, Edinburgh

**Agenda:** Role of Blended Finance for the SDGs

**RSVP:** [\[redacted s 38 -personal information\]@ukifc.com](mailto:[redacted s 38 -personal information]@ukifc.com) or call Chris Tait on +[\[redacted s 38 -personal information\]](tel:[redacted s 38 -personal information])

**Note:** Spaces are limited and are offered on first come first served basis

UKIFC welcome you to the 17<sup>th</sup> instalment of the award-winning Edinburgh Ethical Finance Round Table series (EEFRT) to be held on Wednesday 24<sup>th</sup> October 2018. Normally hosted at Baillie Gifford, this session will be held in partnership with United Nations Development Programme (UNDP) and hosted in Scottish Parliament by the Minister for International Development, Ben Macpherson MSP. The round table forms part of the Global Ethical Finance Initiative and immediately follows after the two- day international Ethical Finance 2018 conference.

The session will explore the role of blended capital in enabling development by joining traditional grant making finance with public and private sector capital and aligning this within the SDG context.

Presentations will be from UNDP, BlueOrchard and the Robertson Trust, as follows:

- What is blended finance and what are the opportunities and challenges in linking this to the SDGs? **Gail Hurley, Policy Specialist on Development Finance, UNDP**
- Designing, structuring, and managing successful blended finance mandates to accelerate the SDGs - **Maria Teresa Zappia, Chief Investment Officer, BlueOrchard**
- Innovative Local Projects: Social Bridging Financing - **Christine Walker, Head of Social Impact, Robertson Trust**

For more information on the EEFRTs please visit [www.ukifc.com/services/ethical-finance](http://www.ukifc.com/services/ethical-finance)

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### **About the Global Ethical Finance Initiative ([www.ethicalfinance.org](http://www.ethicalfinance.org))**

The Global Ethical Finance Initiative is a leading international platform emanating from Edinburgh that convenes the world's foremost business, political and other leaders of society to network, share, co - develop and shape a fairer, more sustainable financial system. Edinburgh will host a series of ethical finance events between 22 – 25 October 2018.



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Resilient nations.*



GLOBAL  
**ETHICAL FINANCE**  
INITIATIVE



The Church of Scotland



## Celebratory Dinner Invitation

**Date:** Tuesday 23<sup>rd</sup> October 2018

**Time:** 6.30pm to 9.30pm

**Venue:** Greyfriars Kirk, 1 Greyfriars Place, Edinburgh, EH1 2QQ

**RSVP:** [\[redacted s 38 -personal information\]@ukifc.com](mailto:[redacted s 38 -personal information]@ukifc.com) or call Chris Tait on +[redacted s 38 -personal information]

**The Church of Scotland and Islamic Finance Council UK (UKiFC) would like to invite you to join us for a private dinner to mark the launch of the Edinburgh Finance Declaration (the Declaration).**

Following the official unveiling of the Declaration at Ethical Finance 2018 on 22nd October 2018 we are delighted to welcome friends from across the globe to Greyfriars Kirk for an informal celebration. The Declaration is an interfaith statement of shared values in ethical finance that has been developed over a two year period.

The dinner is an opportunity to reflect on the journey so far and contemplate how we might take the project forward. We will have a number of short insights from across the faith traditions on what promises to be a convivial evening.

We would be delighted if you are able to join us on this historic occasion. For further information on the Edinburgh Finance Declaration please visit: <http://www.gloablethicalfinance.org/edinburgh-declaration/>

**About the Global Ethical Finance Initiative ([www.ethicalfinance.org](http://www.ethicalfinance.org))**

This project forms part of the Global Ethical Finance Initiative - leading international platform emanating from Edinburgh that convenes the world's foremost business, political and other leaders of society to network, share, co-develop and shape a fairer, more sustainable financial system. Edinburgh will host a series of ethical finance events between 22 – 25 October 2018.



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29. Invitation

From: [redacted s 38 -personal information]

Sent: 12 January 2016 14:30:47

To: Ministerial Correspondence Unit

Subject: FW: Edinburgh Ethical Finance Round Table Invitation - 17th February 2016

Please put on MACCS as a decline for the DFM. Grateful if AO can draft a decline with the signature for [redacted s 38 -personal information], Deputy Private Secretary.  
Thanks, [redacted s 38 -personal information][redacted s 38 -personal information] | Assistant Private Secretary (Correspondence) to John Swinney MSP | Deputy First Minister of Scotland and Cabinet Secretary for Finance, Constitution and the Economy  
Scottish Government | St Andrew's House | Edinburgh | EH1 3DG  
Phone [redacted s 38 -personal information] Mobile [redacted s 38 -personal information]

From: Chris Tait [mailto:[redacted s 38 -personal information]=ukifc.com@mail23.wdc03.rsgsv.net] On Behalf Of Chris Tait  
Sent: 07 January 2016 21:42  
To: Deputy First Minister and Cabinet Secretary for Finance, Constitution and Economy  
Subject: Edinburgh Ethical Finance Round Table Invitation - 17th February 2016  
Your invitation to attend the UK's leading ethical finance discussion platform seeking to promote a 'fairer' and more socially responsible financial sector.

Dear John,

We have pleasure in inviting you to the latest in the award winning<<http://ukifc.us12.list-manage1.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=da10409f12&e=3403751b90>> series of the Edinburgh Ethical Finance Round Table meetings organised by the Islamic Finance Council UK<<http://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=63c706c9ef&e=3403751b90>> (IFC) in conjunction with Maclay Murray & Spens LLP<<http://ukifc.us12.list-manage.com/track/click?u=e3c2b1dd990bc7eb5e3ccbfea&id=776bcd519f&e=3403751b90>> (MMS).

Following on from the last round table (which included a presentation from TSB Banking Group on their approach to building and branding a trusted mainstream bank as well as a discussion on the possible development of a 'kite-mark' for ethical products) this event will focus on social and ethical investment opportunities for social housing in Scotland.

[redacted s 38 -personal information] (CEO, Aberdeen YMCA) and Luxembourg-based [redacted s 38 -personal information] (Research Director for the think-tank INTEGRATE, and former Associate Director at the European Investment Bank) will explore the possibility of Scotland becoming a European Pathfinder for a new model of social / ethical investment in social housing. There is a shortfall in availability of finance for long-term capital investment across the EU. But there are some developing opportunities: the '315 billion Investment Plan for Europe' ('Juncker Plan') and - the focus of this intervention - a new legal framework for medium/long-term financial instruments called a European Long Term Investment Fund? (ELTIF), which will allow saving and investment across multiple jurisdictions. If the ELTIF framework can be made to work, Scotland could be one of the first places in Europe to benefit from an exciting investment opportunity.

Margaret Burgess MSP and Minister for Housing and Welfare has been invited to speak / attend. Graham Burnside will also provide an update on behalf of the Scottish Ethical Finance Hub following the soft launch in November.

The event details are: DATE: Wednesday 17 February 2016 TIME: 12pm ? 2pm (a buffet lunch will be available from 12pm - 12.20pm) VENUE: MMS, Quatermile One, 15 Lauriston Place, Edinburgh, EH3 9EP RSVP:

Reply to this email or direct to **[redacted s 38 -personal information]**@ukifc.com by Friday 29th January 2016 (please note that availability is limited and places will be offered on a first come first served basis). We hope that you will be able to join us in next month for what should be another interesting and engaging event.

Best regards,

Chris

Project Manager Islamic Finance Council UK Office: +**[redacted s 38 -personal information]** Mobile: +**[redacted s 38 -personal information]** www.ukifc.com

30. Response

[Deputy First Minister](#)

and Cabinet Secretary for Finance, Constitution and Economy

John Swinney MSP



Chris Tait

Project Manager, Islamic Finance Council UK

**[redacted s 38 -personal information]**@ukif.com

Our ref: 2016/0000910

January 2016

Thank you for your e-mail of 7 January to John Swinney MSP, Deputy First Minister and Cabinet Secretary for Finance, Constitution and Economy, regarding the forthcoming meeting off your Ethical Finance Round Table event which has been rescheduled to 17 February.

Unfortunately, due to a fully committed diary, the Deputy First Minister is unable to attend on this occasion. Mr Swinney has asked me to pass on his best wishes for a successful event.

[REDACTED S 38 -PERSONAL INFORMATION]

31. Acceptance of invitation

**From:** [redacted s 38 -personal information]

**Sent:** Monday, July 30, 2018 12:01 PM

**To:** Cabinet Secretary for Finance, Economy and Fair Work <CabSecFEFW@gov.scot>

**Cc:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>;

[redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>

**Subject:** Ethical Finance Festival 22 October 2018

Private Office

You will have in the Cabinet Secretary's diary, confirmation of ministers' attendance and participation at the Ethical Finance Festival to be held in Edinburgh from 22 to 24 October 2018. Mr Mackay has agreed to host the Castle reception 22 October, between 18:30 – 21:00.

I have attached a list of "VIP" invitations for the Cabinet Secretary's signature. We would suggest that the invitations are emailed rather than posted and cc'd as indicated in the attached table.

Happy to discuss.

Regards, [redacted s 38 -personal information]

[redacted s 38 -personal information]

[redacted s 38 -personal information] | Policy Advisor | Financial Services and Fintech Policy  
| Innovation, Investment and Industries Division | Directorate for Economic Development | Tel: AQ[redacted s 38 -personal information] | email: [redacted s 38 -personal information]@gov.scot



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32. Invitee list

[redacted s 30(b)(i) – free and frank provision of advice]

33. Invitation

From: Ken.MacIntosh.msp@scottish.parliament.uk  
Sent: 26 March 2013 00:19:27  
To: Scottish Ministers  
Subject: FAO: John Swinney MSP, Cabinet Secretary for Finance, Employment and Sustainable Growth  
Attachments: IFC Ethical Finance Hub - letter to MSP Ken Macintosh - March15 - FINAL ISSUED.PDF

TO: John Swinney MSP  
Cabinet Secretary for Finance, Employment and Sustainable Growth

Dear John

Several weeks ago I hosted a roundtable discussion on ethical finance with the Islamic Finance Council. Many topics were discussed, but one idea which was mooted and which had widespread support was for the setting up of an Ethical Finance Hub, which would promote the ethical finance agenda and put Scotland on the map as a place for ethical investment.

I enclose a copy of a letter which I received from Tariq Masood Shaikh, the Chair of the Islamic Finance Council which outlines their proposal.

I am very keen to support this proposal and I wondered if you had any thoughts on whether it is something the Scottish Government might be able and willing to put its weight behind?

I would be happy to discuss it with you in person or to arrange a joint meeting with the IFC.

With best wishes.

Yours sincerely Ken

Ken Macintosh MSP  
Member of the Scottish Parliament for Eastwood  
Parliamentary Office: M1.13, MSP Block | Tel: [redacted s 38 -personal information]  
Constituency Office: 1 Spiersbridge Way, Thornliebank G46 8NG | Tel: [redacted s 38 -personal information]

Email:

ken.macintosh.msp@scottish.parliament.uk<mailto:ken.macintosh.msp@scottish.parliament.uk> | website: www.kenmacintosh.co.uk<http://www.kenmacintosh.co.uk/> | twitter: @KenMacintoshMSP

We send out a regular e-bulletin to all those who have emailed Ken. Please let us know if you would rather not receive this.

\*\*\*\*\*

\*

For latest news and information about all aspects of Parliamentary business, MSPs

34. Response

Cabinet Secretary for Finance, Employment and Sustainable Growth

John Swinney MSP

T: [redacted s 38 -personal information]

Mr Kenneth Macintosh MSP

The Scottish Parliament

EDINBURGH

EH99 1SP



Our ref: 2013/0008264

April 2013

Thank you for your email of 26 March about the Islamic Finance Council (IFC) and its proposal for a Scottish Ethical Finance Hub.

I would be delighted to meet with you and the IFC. Please contact my Assistant Private Secretary, [redacted s 38 -personal information] on [redacted s 38 -personal information] to finalise the arrangements.

**JOHN SWINNEY**

35. Invitation

**From:** Chris (IFC) <[redacted s 38 -personal information]@ukifc.com>  
**Sent:** Thursday, March 26, 2015 2:41 PM  
**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>  
**Cc:** [redacted s 38 -personal information]@ukifc.com; [redacted s 38 -personal information]@visitscotland.com; [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@scotland.gsi.gov.uk>  
**Subject:** RE: FW: GEFF 2015

Hi [redacted s 38 -personal information]

It was good to speak to you earlier today.

I have updated Omar on the funding situation and suggested that we get the invoice raised and issued over the coming days to ensure this is concluded as a matter of urgency.

The organisers have given me permission to share the attached (confidential) agenda which will answer your questions regarding the speaking slots available to the SG (as well as the topics and prospective speaker profiles). The ideal scenario would be to have Mr Swinney address the RT, Mrs Sturgeon address the Conference and Mr Yousaf address the Conference Dinner!

I look forward to receiving your ethical finance timeline / overview (and other appropriate materials) for inclusion on the website.

Best regards,

Chris

On 26 March 2015 at 09:41 "Chris (IFC)" <[redacted s 38 -personal information]@ukifc.com> wrote:

Hi [redacted s 38 -personal information],

Many thanks for the logos. I have forwarded these on with the guidance note provided.

The primary use for the ethical finance background / timeline is for the website but I think it could also be relevant for event materials such as promo materials and conference brochures. If there are any other off-the-shelf factsheets or documents you feel are relevant please send them to me I can try and get them uploaded onto the event website.

That would be great if you can confirm the speakers and funding asap.

Regarding the Scottish Ethical Finance Hub, I believe that the Steering Group, which [redacted s 38 -personal information] sits on, have a report which is now very near completion and my colleague Graham Burnside has been keeping Mr Swinney advised of developments. He expects to be writing to him again in the near future.

Best regards,

Chris

On 26 March 2015 at 09:22 [redacted s 38 -personal information]@scotland.gsi.gov.uk wrote:

Chris – thanks,

I have attached the logos – print and web quality. Our marketing department have asked me to pass on the following note regarding use of the SG logo in particular:

I'd be grateful if you would ensure that the guidelines are followed carefully to ensure the logo is used correctly, particularly in relation to size, placement (**always top or bottom right and to the right of any other logos/brands**) and ensuring appropriate clear space. You should also point out that permission is restricted to the specific request and should not be regarded as implying blanket use or support.

I'm working on briefing around ethical finance today for other meetings – so I'm sure I'll be able to pull something together that would be suitable for your needs. Is the plan to use the timeline in promotional material, conference programmes etc?

Speaker details have yet to be confirmed – I will pass on as soon as I'm able.

On a separate note, do you have any news on the plans for the Ethical Finance Hub – is a further business plan being prepared?

Best regards

**[redacted s 38 -personal information]**

[redacted s 38 -personal information] | Senior Policy Executive | Financial and Business Services |  
Tel: AQ: [redacted s 38 -personal information] | Blackberry: [redacted s 38 -personal information] |  
e-mail: [redacted s 38 -personal information]@scotland.gsi.gov.uk

**From:** Chris (IFC) [mailto:[redacted s 38 -personal information]@ukifc.com]  
**Sent:** 26 March 2015 08:22  
**To:** [redacted s 38 -personal information]  
**Cc:** [redacted s 38 -personal information]@ukifc.com; [redacted s 38 -personal information]@visitscotland.com; [redacted s 38 -personal information] [redacted s 38 -personal information]  
**Subject:** RE: FW: GEFF 2015

Morning [redacted s 38 -personal information],

You will no doubt have noticed from my flurry of emails that activity levels have ramped up and I am fielding regular queries from the team in Dubai!

As such I have again been asked for an update on the funding and speakers?  
I am also being chased for the SG and Visit Scotland logos (as per our recent, separate correspondence) as well as an historical timeline of key achievements / developments in the ethical finance industry in Scotland. Do you have anything which could assist in pulling this together?

The organisers are working on a draft invitation letter and I will send it on to you in the next few days. It will provide an idea of their expectations and protocol conventions. They are also in the process of compiling all the contact details for VIP's and I will share this with you when it is ready.

Thanks again for your help.

Best regards,

Chris

On 23 March 2015 at 09:11 "Chris (IFC)" <[redacted s 38 -personal information]@ukifc.com> wrote:

Morning [redacted s 38 -personal information]

I note, since my email below, that Omar Shaikh (IFC) has provided an update to Mr Yousaf and [redacted s 38 -personal information] cc'd in for info.

I have been in touch with the organisers over the weekend and they have advised that solid progress has been made in terms of the website, marketing, agenda, etc. As such it would be great if you were able to update me on the actions (in red) from the email below as well as the actions in red from this email to ensure the Scottish Government maximises this opportunity.

The Thomson Reuters RFI Roundtable will take place on the morning of Monday 31st August and they are happy to have a Scottish Government Representative make some introductory remarks. **The afternoon is available for VVIP tours / site visits etc so it would be good to get your suggestions as to what might be appropriate.** Just to clarify, the VVIP's are listed below and I still need **confirmation as to who I should be liaising with regarding the VVIP invitations:**

1. [redacted s 38 -personal information], Visiting Professor, ICMA Executive Education
2. [redacted s 38 -personal information], Governor, Bank Negara Malaysia
3. [redacted s 38 -personal information], Advisor to the Group CEO, HSBC Holdings
4. [redacted s 38 -personal information], Professor of Practice, Institute d'Etudes Politiques, Paris / Chairman of Phoenix Group Holdings
5. [redacted s 38 -personal information], CEO, International Islamic Liquidity Management Corporation
6. [redacted s 38 -personal information], Governor, Dubai International Financial Center (DIFC)
7. [redacted s 38 -personal information], Ex-Governor, Central Bank of Luxembourg / Member of the Board, European Central Bank
8. [redacted s 38 -personal information], Former President of Germany

The event website is under construction and it will aim to showcase the history of Scotland's role in ethical finance. It will also try to reflect more generally Scottish history, Scottish culture, Scottish Parliament and economy etc. It has been suggested that it includes a timeline covering key points in Scottish financial history and place GEF at one end to emphasize that is truly a historic event which reinforces Scotland's indisputable role in ethical finance. As the event will be marketed globally to over 20,000 people this is a great opportunity to showcase Scotland and we would invite you to **provide your thoughts on what should be included in the timeline as well as any relevant information / documents / materials which could be included on the website.**

As mentioned before I am happy to catch up in person to go through everything if it helps.

Best regards,

Chris

On 18 March 2015 at 11:56 "Chris (IFC)" <[redacted s 38 -personal information]@ukifc.com> wrote:

Morning [redacted s 38 -personal information],

Further to my voicemail this morning and emails below I can now confirm that the event will take place at the Balmoral Hotel in Edinburgh on 31<sup>st</sup> Aug – 2<sup>nd</sup> Sep.

Omar Shaikh and Graham Burnside (of the IFC) are in Dubai at present and met yesterday with the Deputy CEO and Chairman of the event organisers so I am able to provide an update for you.

The organisers have secured a partnership with Thomson Reuters, the world's leading source of intelligent information for businesses and professionals, and they will host an exclusive, closed door round table on 31<sup>st</sup> Aug. This was originally planned to be held in London but we have managed to convince them to combine it with the conference (which was originally planned for Zurich!) in Edinburgh. The guests on the Indicative VIP list I have already sent have been confirmed by the organisers as the VIPs that will be attending. The first 8 will require official government invites and we may require further Government invites in due course. The quality and calibre of the people on the list, along with the involvement of Thomson Reuters, will position this as a high profile, global event.

The conference will take place on the Tue 1<sup>st</sup> and Wed 2<sup>nd</sup> Sep with speakers, from the Thomson Reuters round table as well as the speaker universe list I have previously sent, covering the topics on the draft agenda. Thomson Reuters will use the conference as a platform to launch their "Responsible Finance Report".

The organisers, using their extensive contacts, have confirmed that they expect to recruit around 100 conference delegates from the Gulf. The IFC, working in partnership with partner organisations, will support the targeting of prospective delegates in the UK and Europe.

The private meetings, site visits etc will be organised around, and in parallel with, the round table and conference, details of which can be discussed and progressed in due course. Humza Yousaf MSP has kindly agreed to host the Reception in the Castle on the evening of Wed 2<sup>nd</sup> Sep.

The organisers have started working on the event literature and website which Omar and Graham had visibility of yesterday. This should be ready in a week or so.

In terms of urgent actions, I would be grateful if you could confirm:

- The level of funding to be provided by the Scottish Government and associated agencies
- List of agencies providing aforementioned financial support and their logos (to be included on event literature and website)
- The Scottish Government representative to address the Thomson Reuters round table on the morning of Mon 31<sup>st</sup> Aug
- The Scottish Government official to deliver the opening remarks at the conference on Tue 1<sup>st</sup> Sep (around 0900 – 0930).

Please let me know if you would like to discuss this in person or over the phone.

Best regards,

Chris

**[redacted s 38 -personal information]**

On 12 March 2015 at 15:24 "Chris (IFC)" <**[redacted s 38 -personal information]**@ukifc.com> wrote:

Afternoon,

Further to my email below I am now able to share some additional information relating to prospective VIP's and possible speakers. I would ask that you treat these lists as confidential.

This is not the final VIP list but it will provide an indication as to the profile of the individuals requiring invitations from the Scottish Government. I would hope that this will allow us to identify the most appropriate minister from whom the invites should come thereby allowing us to start preparing in anticipation of the event being formally launched.

When the agenda has been finalised I expect that the organisers will identify and approach the appropriate people on their speaker list. There are certainly others the IFC could add if required.

Best regards,

Chris

On 11 March 2015 at 09:04 "Chris (IFC)" <**[redacted s 38 -personal information]**@ukifc.com> wrote:

Morning **[redacted s 38 -personal information]**

Thank you for the email below.

I have managed to get a draft of the topics / themes we expect to be covered within the GEF2015.

- Every challenge is an opportunity - The Opportunity for the Financial services industry in the face of its ethical challenges
- Can many worlds converge? A dialogue between ESG, SRI, UNPRI, Islamic Finance and other responsible financial services sectors
- ESG Screens and the mitigation of risk – Lessons that can be learnt from the ESG Asset management industry
- Positive Screening – Lessons that can be learnt from the SRI industry



•Islamic finance and its unique approach in regulating ethically focused banking – Lessons for responsible finance

•Launch of the Thomson Reuters Responsible Finance Report (CONFIDENTIAL)

•Making Ethical Investment more accessible: A conversation on the important role of Green Bonds, Social Impact Bonds, Green Sukuks and other innovations

•Synergies through collaboration - Opportunities for convergence in principles and standards

•Growing the size of the pie – championing a unified approach for responsible finance to main street finance and its regulators

•The Role of technology and disruptive innovation to facilitate responsible finance

•One –on – One conversation - Future of Responsible Finance – Where to from here?

•Differing jurisdictional approaches to SRI (European, Gulf, South Asia)

•Measuring social returns

•Creating bond market solutions for social impact (SIB)

We would be hoping to get the First Minister to deliver a keynote address at the start of the event. Based on the draft agenda it might be easier for the Scottish Government to suggest potential speakers / topics and I can put that forward for inclusion. Otherwise I can speak to the organisers to see if they have any thoughts about this.

I have also attached two press articles for further background to the event.

**[redacted s33(1)(b) – commercial interests]**

The dates for the conference are likely to be 31st August and 1st September with the 2nd set aside for site visits (i.e. investment projects / tourist sites etc), roundtable, private meetings and the evening reception in the Castle.

I hope this helps and I am pushing hard for the VIP list for the invitation letters.

Best regards,

Chris

Thanks Chris

As **[redacted s 38 -personal information]** said, I'm waiting for some colleagues to provide me with confirmation on the funding side – it would help to have some idea of the agenda to reassure people on the content of the conference and how it then relates to their work area. Is there a rough outline of the programme you can share yet?

From a funding perspective we also need to be clear on the total funding you are looking for, and when this will need to be paid.

I have checked with Ministerial offices and there is likely to be availability from ministers on the proposed dates, but we'll need to firm this up soon in diaries, for speaking slots and attendance at dinners or other events as well as any proposed one to one meetings.

Regards

**[redacted s 38 -personal information]**

**[redacted s 38 -personal information]** | Senior Policy Executive | Financial and Business Services |  
Tel: AQ: [redacted s 38 -personal information] | Blackberry: [redacted s 38 -personal information] |  
e-mail: [redacted s 38 -personal information]@scotland.gsi.gov.uk

**From:** Chris (IFC) [mailto:[redacted s 38 -personal information]@ukifc.com]  
**Sent:** 09 March 2015 16:10  
**To:** [redacted s 38 -personal information]  
**Cc:** [redacted s 38 -personal information]; [redacted s 38 -personal information];  
[redacted s 38 -personal information]  
**Subject:** Re: FW: GEFF 2015

Hi [redacted s 38 -personal information],

Many thanks for your update in the email below and for putting me in touch with [redacted s 38 -personal information] (whom I have been corresponding with regarding a related matter) and [redacted s 38 -personal information].

Hi [redacted s 38 -personal information],

Omar and Graham Burnside (IFC executive board members) are in Dubai next week to finalise plans for the GEFF 2015 so I will get back to you asap regarding the agenda (for keynote address) and VIP names (for invitations).

If at all possible it would be great to have an update on funding by the end of the week as this can be factored in to the aforementioned conversations taking place in Dubai.

Best regards,

Chris

On 05 March 2015 at 17:47 **[redacted s 38 -personal information]** <**[redacted s 38 -personal information]**@visitscotland.com> wrote:

Hello Chris,

Good to hear that discussions are underway with the convention bureau in Edinburgh.

There have been some conversations taking place behind the scenes on your points below. I copy in **[redacted s 38 -personal information]** from the Scottish Government who will be the main contact regarding funding amongst the group, and I believe we are just awaiting a couple of confirmations on this.

Regarding invitation letters and Ministerial diaries, **[redacted s 38 -personal information]** and **[redacted s 38 -personal information]** copied in can liaise on these points. For formal invitations from the most appropriate Ministers, it may help if you can indicate if there is a specific group of VIP guests who would appreciate this most, or any other information that would be useful for us to have to tailor communications accordingly? I'm aware that Ministerial diaries have been sense-checked for availability, pending further details of the event programme.

Best regards

**[redacted s 38 -personal information]**

**[redacted s 38 -personal information]**

Marketing Manager – Emerging Markets & Special Projects

Business Tourism

VisitScotland

94 Ocean Drive

Edinburgh EH6 6JH

Tel: +**[redacted s 38 -personal information]**

Fax: +**[redacted s 38 -personal information]**

Mobile: +[redacted s 38 -personal information]

[redacted s 38 -personal information]@visitscotland.com

**From:** Chris (IFC) [mailto:[redacted s 38 -personal information]@ukifc.com]

**Sent:** 03 March 2015 07:55

**To:** [redacted s 38 -personal information]

**Cc:** [redacted s 38 -personal information]@ukifc.com

**Subject:** RE: GEFF 2015

Morning [redacted s 38 -personal information]

I have been in touch with [redacted s 38 -personal information] and [redacted s 38 -personal information] at Marketing Edinburgh so thank you for the introduction.

Plans for the event are developing well so I would expect that the organisers will be looking to launch it very soon. As such I was wondering if you had any update following our email exchange below?

Best regards,

Chris

**From:** Chris (IFC) [mailto:[redacted s 38 -personal information]@ukifc.com]

**Sent:** 17 February 2015 11:20

**To:** [redacted s 38 -personal information]

**Cc:** [redacted s 38 -personal information]@ukifc.com

**Subject:** GEFF 2015

Hi [redacted s 38 -personal information],

Many thanks for your time this morning and it was great to "hello". Next time we can, perhaps, catch up in person!

As discussed, I am assisting Omar and the team in Dubai to pull things together over here. Based upon the brief I have and the notes I have picked up from various emails it would be great if you

could review the list below and advise on the items where you can help directly and, where not, point me in the right direction.

- Identify the organisations prepared to provide financial support, indicative levels of support and a contact for each (or central person pulling it all together)
- Acquire the logos of aforementioned organisations to ensure they appear on event literature etc
- Get an introduction to Marketing Edinburgh's Convention Bureau
- Determine which organisation and individual(s) can help with the invitation letters (as per middle east protocol for inviting, for example, [redacted s 38 -personal information], Governor, Central Bank of Bahrain)
- Confirm presence and keynote speech from First Minister (i.e. Nicole Sturgeon) and potential cabinet ministers / MP's (John Swinney / Stewart Hosie) or similar to speak at the event
- MSP Yousaf has confirmed he is hosting the reception in Edinburgh Castle on the evening of the 2<sup>nd</sup> Sep but just wanted to confirm.

Progressing these items will be a great start, along with confirming a venue!

Thereafter we can go into more detail on the number / profile of attendee and what we need to do to maximise their visit.

Kind regards,

Chris

Project Manager  
Islamic Finance Council UK  
Office: +[redacted s 38 -personal information]  
Mobile: +[redacted s 38 -personal information]  
[www.ukifc.com](http://www.ukifc.com)

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Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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36. Invitation

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot> **On Behalf Of** Cabinet Secretary for Finance and Economy

**Sent:** Monday, July 4, 2022 9:36 AM

**To:** Public Engagement Unit <CorrespondenceUnit@gov.scot>

**Cc:** Cabinet Secretary for Finance and Economy <CabSecFE@gov.scot>

**Subject:** FW: Dinner Invitation: 5th Sept (1830): Scottish TF for Green & Sustainable FS [EF22]

For MiCase as diary

**[redacted s 38 -personal information]**

Deputy Private Secretary to Cabinet Secretary for Finance and Economy – Kate Forbes

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

**T:** [redacted s 38 -personal information] | **M:** [redacted s 38 -personal information] | **E:** CabSecFE@gov.scot

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**From:** Chris (GEFI) <[redacted s 38 -personal information]@globlethicalfinance.org>

**Sent:** 04 July 2022 09:10

**Cc:** Omar (GEFI) <[redacted s 38 -personal information]@globlethicalfinance.org>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@globlethicalfinance.org>

**Subject:** Dinner Invitation: 5th Sept (1830): Scottish TF for Green & Sustainable FS [EF22]

Dear All,

Further to my email below, you are cordially invited to join the Ethical Finance Global Summit 2022 dinner taking place at the NatWest Group Business School at 1830 on Monday 5<sup>th</sup> September 2022. The dinner will be an opportunity to meet some of the senior global FS leaders joining for the Summit and will feature an address from Dame Susan Rice, GEFI Global Steering Group Chair.

Please RSVP to **[redacted s 38 -personal information]** (cc'd) to confirm your attendance. FYI, attached are details of our wider VIP programme during the Summit. Should you wish to participate in any of the private sessions or join the GEFI summit please get in touch.

The next Taskforce meeting is scheduled to take place at circa 1315 – 1430 on Wednesday 7<sup>th</sup> September 2022. A diary invitation will be circulated in due course.

Best regards,

Chris

**From:** Chris (GEFI)

**Sent:** 24 May 2022 18:51

**Cc:** Omar (GEFI) <**[redacted s 38 -personal information]**@globaethicalfinance.org>; **[redacted s 38 -personal information]**

**Subject:** Scottish TF for Green and Sustainable FS Meeting Action Points (4th May)

Dear All,

Thank you to members who attended (in-person or remotely) the Scottish Taskforce for Green and Sustainable Financial Services meeting kindly hosted by Phoenix Group earlier this month.

The next meeting will take place at **2.30pm, Wednesday 7<sup>th</sup> September 2022** at the NatWest Group Business School, Gogarburn. This will be alongside GEFI's annual Summit and we will be inviting all Taskforce member for a private dinner with our international guests.

Please find attached the key action points for your attention as noted at the meeting. To ensure a focused and progressive Taskforce your prompt involvement on the action points would be appreciated (specifically around point 5). In addition, as Secretariat, we will follow-up with individuals on other discussion points.

Separately, GEFI's Ethical Finance Round Table series resumes in-person in Edinburgh on Tuesday 14<sup>th</sup> June 2022. Phoenix Group, abrdn and S&P Global will be exploring ESG data provision, its development and its role in ethical asset management. Places are limited and you can find out more and register [HERE](#).



Best regards,

Chris

**Chris Tait** | Chief Operating Officer



M: +[redacted s 38 -personal information]

[www.globalethicalfinance.org](http://www.globalethicalfinance.org)

\*\*\*\*\*

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37. Response

T : [redacted s 38 -personal information]

E : [scottish.ministers@gov.scot](mailto:scottish.ministers@gov.scot)

[redacted s 38 -personal information]@quantumcommunications.co.uk

Our Reference: 202000086269

Your Reference: Virtual Global Ethical

Finance Summit 2020 18 September

2020

Dear [redacted s 38 -personal information],

Thank you for your e-mail of, 4 September inviting the Cabinet Secretary for Finance, Kate Forbes MSP to pre-record a video address to be presented at the Global Ethical Finance Initiative (GEFI) virtual conference.

Ms Forbes would be delighted to accept your invitation and I should be grateful if you would contact her Diary Secretary, [redacted s 38 -personal information], at [CabSecFinance@gov.scot](mailto:CabSecFinance@gov.scot) to make the necessary arrangements.

Yours sincerely,

[redacted s 38 -personal information]

[redacted s 38 -personal information]

Private Secretary

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Edinburgh EH1 3DG [www.gov.scot](http://www.gov.scot)

38. Email

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot> **On Behalf Of** First Minister

**Sent:** Wednesday, August 5, 2020 12:23 PM

**To:** Public Engagement Unit <CorrespondenceUnit@gov.scot>

**Subject:** FW: Invitation for First Minister: Ethical Finance Summit 2020

MACCS diary case – signature by [redacted s 38 -personal information], Deputy Private Secretary.

Thanks,

[redacted s 38 -personal information]

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@quantumcommunications.co.uk>

**Sent:** 05 August 2020 12:02

**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>; Lloyd E (Elizabeth) <Elizabeth.Lloyd@gov.scot>

**Cc:** First Minister <firstminister@gov.scot>

**Subject:** Invitation for First Minister: Ethical Finance Summit 2020

Dear [redacted s 38 -personal information] and Liz,

I hope you are both well. I know it is still an incredibly busy time for you.

Please find attached an invitation for the First Minister from the Global Ethical Finance Initiative to address this year's Ethical Finance global summit, taking place once again this October - albeit virtually. Other speakers already confirmed include Richard Curtis, Keith Skeoch and Dame Susan Rice.

Kind regards,

[redacted s 38 -personal information].

---

[redacted s 38 -personal information]

Director

Quantum Communications

Tel: [redacted s 38 -personal information]



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39. Invitation



[redacted s 38 -personal information]



First Minister  
St. Andrew's House  
Regent Road  
Edinburgh  
EH1 3DG

Global Ethical Finance Initiative  
423 Paisley Road West  
Suite 107 Bellahouston Business  
Centre  
Glasgow  
G51 1PZ

**Wednesday  
5<sup>th</sup> August 2020**

Dear First Minister

**Invitation to Participate in the Virtual Ethical Finance 2020 Summit**

Firstly I would like to thank you for your leadership and commend Government for its collective efforts to protect lives and jobs during these unprecedented times. I hope the elimination strategy succeeds and we are able to make progress on rebuilding a resilient economy that supports the transition toward a greener, net zero country.

I am writing on behalf of the Global Ethical Finance Initiative (GEFI) – an innovative, practitioner-led not-for-profit organisation committed to: (1) driving finance for positive change; and (2) positioning Scotland as a global centre for ethical finance. Having delivered an excellent keynote address at our flagship event in Edinburgh in October 2019 I would like to take this opportunity to invite you to participate in the 5<sup>th</sup> annual Ethical Finance summit (EF2020) ([www.ethicalfinance2020.com](http://www.ethicalfinance2020.com)) taking place virtually between Monday 5<sup>th</sup> and Thursday 8<sup>th</sup> October 2020.

Our Summit has become the premier platform for holistic discussions on responsible finance, bringing the worlds of banking and investment together. Previous year's keynote addresses included Gordon Brown, Dame Susan Rice, Sir Roger Gifford and Archbishop Justin Welby amongst others. You can access the 2019 event summary and keynote videos at [www.ethicalfinance2019.com](http://www.ethicalfinance2019.com).

With Chartered Banker Institute and the Chartered Institute of Securities and Investment joining as our partners the summit will be also be promoted to their members (over 75,000 finance professionals in the UK and a further 300,000 finance professionals globally). Confirmed speakers include: Alison Rose (NatWest Group), Hiro Mizuno (Japanese Government Pension Investment Fund), HE Dr Bandar Hajjar (Islamic Development Bank), Richard Curtis (Make My Money Matter), Dame Susan Rice (Banking Standards Board), Peter Blom (Triodos Bank), Anne Simpsons (California Public Employees' Retirement System), James Anderson (Baillie Gifford), Fiona Reynolds (Principles for Responsible Investment), Keith Skeoch (Standard Life Aberdeen), Dr Rhian-Mari Thomas (Green Finance Institute), Chris Stark (Committee on Climate Change) and James Talbot (Bank of England).

We would like to invite you to deliver a live keynote address during one of the windows below:

- Monday 5<sup>th</sup> October
  - o 1015 – 1130: Opening keynote address
  - o 1300 – 1400: Keynote address / leadership in times of crisis
- Tuesday 6<sup>th</sup> October
  - o 1015 – 1130: Keynote address
  - o 1300 – 1400: Keynote address / redefining purpose and thinking beyond GDP
- Thursday 8<sup>th</sup> October
  - o 1015 – 1130: Keynote address

If this is not possible we would be delighted if you were able to pre-record an address that we can screen as part of the summit.

With Covid-19 exposing the fragility of health security and economic systems we believe that going forward ethical finance has a pivotal role to play in building social, environmental and economic resilience. As our work at GEFI is now more important than ever and we remain committed to supporting Scottish Government in rebuilding the

economy and positioning our country as a global centre for ethical finance. EF2020 is therefore a high profile platform to learn from others and showcase Scotland.

Yours sincerely,

**[redacted s 38 -personal information]**

**Omar Shaikh**  
Managing Director, Global Ethical Finance Initiative  
**[redacted s 38 -personal information]**@globaethicalfinance.org

[sent electronically]

40. Response

T : **[redacted s 38 -personal information]**  
E : [firstminister@gov.scot](mailto:firstminister@gov.scot)

**[redacted s 38 -personal information]**@[quantumcommunications.co.uk](mailto:quantumcommunications.co.uk)

Our Reference: 202000073811

9 September 2020 Dear **[redacted s 38 -personal information]**,

Thank you for your email of 5 August, inviting the First Minister to the participate in the Virtual Ethical Finance 2020 Summit.

Unfortunately, due to existing commitments, the First Minister is unable to accept your kind invitation on this occasion. She has asked me to pass on her best wishes for a successful event.

Yours sincerely,

**[redacted s 38 -personal information]**  
**[REDACTED S 38 -PERSONAL INFORMATION]**  
**Deputy Private Secretary**



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41. Invitation

Dear **[redacted s 38 -personal information]**,

I trust you are well. It was a pleasure to meet you last July.

I am writing to you to see if you would consider becoming the Chair of Scotland's new Taskforce for Green and Sustainable Financial Services. The purpose of this taskforce is to create the strategy and exploit the opportunities that will secure Scotland's place as a globally recognised centre in green and sustainable financial services.

To build on the existing environmental, social and governance (ESG) activity within Scotland, the First Minister recently announced the establishment of the taskforce at the Ethical Finance Summit in June 2021. The Global Ethical Finance Initiative (GEFI), supported by Scottish Financial Enterprise (SFE) and with Scottish Government as a founding and funding partner will convene the industry-led taskforce to deliver a roadmap that will chart Scotland's course towards becoming a world-leading centre of Green and Sustainable Financial Services.

It is proposed the Taskforce will be introduced to stakeholders in the Financial Services community at the relaunch meeting of Financial Services Advisory Board (FiSAB) (date to be confirmed). The Taskforce will run for a period of three years until March 2024, and is expected to meet 3-4 times annually, with working parties meeting more frequently.

The Taskforce will report annually on progress and policy recommendations to the FiSAB, chaired by the First Minister, thereby remaining aligned with existing Scottish Government and industry structures for government-industry collaboration. I will attend the initial launch meeting in November (date to be confirmed), after which meetings will be industry led.

In terms of the membership, preliminary discussions between Scottish Government officials, GEFI and SFE have identified an initial cohort of members which reflects

the diversity of the ESG finance ecosystem and draws on both home-grown and international expertise.

Scotland's world-class Financial Services sector will be crucial to delivering a sustainable and green investment-led recovery, and as we prepare to host COP26 we are keen to capitalise on this opportunity.

I would be grateful if you might consider this opportunity to chair Scotland's Taskforce for Green and Sustainable Financial Services at this critical moment for the financial services industry, the Scottish economy, and our planet.

Yours sincerely,

Kate Forbes MSP

Cabinet Secretary for Finance and the Economy

42. Invitation

Minister for Business, Trade, Tourism and Enterprise  
Ivan McKee MSP



vernment

Scottish Government  
Riaghaltas na h-Alba  
gov.scot

[redacted s 38 -personal information]

Governor

State Bank of Pakistan

I.I Chundrigar Road

Karachi

Karachi City

22 February 2024

Dear [redacted s 38 -personal information]

Invitation to Participate in The Future of Sustainable Finance Event (Dubai, 23rd March 2022)

I am delighted to understand that you have agreed to participate in Scotland's Global Ethical Finance Initiative event in Dubai on the 23<sup>rd</sup> of March 2022.

As part of Scotland's Expo 2020 Dubai programme we are working in partnership with the Global Ethical Finance Initiative (GEFI) to host a dedicated fringe event focused on sustainable global finance. The session, taking place in Dubai International Financial Centre at 09.30 – 11.30 (UAE) on Wednesday 23<sup>rd</sup> March 2022, will provide an opportunity for global leaders to unpack and explore the latest trends in financing the Sustainable Development Goals and Environmental, social and corporate governance investing.

With Pakistan amongst the first countries in the world to approve the SDGs as a national development agenda I am interested to learn about SBP's work in this area and understand what local banks are doing in relation to green and sustainable finance.

The SDGs offer a vision of the world that I believe people in Scotland share and our National Performance Framework is Scotland's way to localise the SDGs. Our ambitions for a fairer Scotland are dependent on global action to tackle poverty, promote prosperity and to tackle climate change. I therefore look forward to a discussion on prioritising the SDGs in making finance sustainable.

If diaries permit, I would welcome a private meeting immediately before the event and my team can liaise with your office to make the necessary arrangements. With Scotland's growing reputation as a global centre for green and sustainable finance, this would present an excellent opportunity to explore potential collaboration around the role the financial sector must play in supporting the transition to a low carbon economy.

I look forward to hearing from you in due course and meeting you in Dubai.

Kind regards,

[redacted s 38 -personal information]

IVAN MCKEE

43. Email

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot> **On Behalf Of** Minister for Public Finance and Digital Economy  
**Sent:** Monday, February 10, 2020 10:32 AM  
**To:** Public Engagement Unit <CorrespondenceUnit@gov.scot>  
**Cc:** Minister for Public Finance and Digital Economy <MinisterPFDE@gov.scot>  
**Subject:** RE: Meeting request - Global Ethical Finance Initiative

Apologies just read the last line and it is a dairy case not an MR



Regards

[redacted s 38 -personal information]

Assistant Private Secretary to Kate Forbes MSP

Minister for Public Finance and Digital Economy

4N.11 | St Andrew's House | Regent Road | Edinburgh | EH1 3DG

Tel: [redacted s 38 -personal information]

Please check our updated Ministerial Preferences

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**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot> **On Behalf Of** Minister for Public Finance and Digital Economy

**Sent:** 10 February 2020 10:29

**To:** Public Engagement Unit <CorrespondenceUnit@gov.scot>

**Cc:** Minister for Public Finance and Digital Economy <MinisterPFDE@gov.scot>

**Subject:** FW: Meeting request - Global Ethical Finance Initiative

Hi

Can you please add this to the system as a MR case for Ms Forbes.

Regards

[redacted s 38 -personal information]

Assistant Private Secretary to Kate Forbes MSP

Minister for Public Finance and Digital Economy

4N.11 | St Andrew's House | Regent Road | Edinburgh | EH1 3DG

Tel: [redacted s 38 -personal information]

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**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@quantumcommunications.co.uk>  
**Sent:** 07 February 2020 15:53  
**To:** Minister for Public Finance and Digital Economy <MinisterPFDE@gov.scot>  
**Subject:** Meeting request - Global Ethical Finance Initiative

Dear Kate,

Congratulations once again on presenting the budget to Parliament this week in difficult circumstances.

Thank you for agreeing to consider a meeting with the Global Ethical Finance Initiative (GEFI). As you are aware, GEFI works with the world's business, political, and social leaders to build a fairer finance system. The Scottish Government has been very supportive and a key partner to GEFI.

Major institutions including the United Nations, Bank of England, Financial Conduct Authority, RBS, Baillie Gifford and HSBC attended GEFI's recent global ethical finance summit in Edinburgh, which was addressed by the First Minister and the Archbishop of Canterbury. Over 300 senior representatives from more than 200 companies and organisations from across the globe attended, with an asset value of \$12 trillion, to discuss a wide range of issues covering sustainable and inclusive growth.

This year, GEFI has already launched its 'Path to COP26' initiative to bring the world's finance sector together to address the climate emergency and to promote Scotland. It is also working closely with the UNDP and other organisations through a two-year programme to create a financial solution that allows private finance to be deployed to SDG-aligned investment opportunities. And it has helped establish a new global taskforce on the role of Islamic finance in the delivery of SDGs, and will be working to bring faith leaders together later this year.

GEFI will be hosting its annual summit in Edinburgh in October this year, which will once again be supported by the Scottish Government, as well as a series of roundtable events in Edinburgh and London. It will soon be releasing a key report that profiles the Scottish ethical investment market.

GEFI is working hard to promote Scotland as the global capital of ethical finance. Managing director Omar Shaikh and project manager Chris Tait would very much appreciate a meeting with you to discuss their work programme this year and how they can support the Scottish Government and further promote Scotland. I hope we can facilitate this and look forward to hearing from you.

Kind regards,

**[redacted s 38 -personal information].**

---

**[redacted s 38 -personal information]**

Director

Quantum Communications

Tel: **[redacted s 38 -personal information]**



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44. Response

Ministear airson Ionmhas Poblach agus Eaconomaidh Dhidseatach  
Ceit Fhoirbheis BPA

Minister for Public Finance and Digital Economy Kate Forbes MSP

T : **[redacted s 38 -personal information]**

E : [scottish.ministers@gov.scot](mailto:scottish.ministers@gov.scot)

**[redacted s 38 -personal information]** [@quantumcommunications.co.uk](mailto:[redacted s 38 -personal information]@quantumcommunications.co.uk)

Our Reference: 202000015596  
17 February 2020 Dear **[redacted s 38 -personal information]**

.....Column Break..... **abcd**

Thank you for your email of 7 February 2020, inviting the Minister for Public Finance and Digital Economy, Kate Forbes MSP to a meeting to discuss GEFI activity in the coming year.

Unfortunately, the Minister is unable to accept your kind invitation at this time. However, Ms Forbes is aware that you are currently engaged with officials and she has asked me to pass on her best wishes for the future.

Yours sincerely

**[redacted s 38 -personal information]**

**KATE FORBES**



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St Andrew's House, Regent Road, Edinburgh EH1 3DG [www.gov.scot](http://www.gov.scot)

45. Email

**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot> **On Behalf Of** Cabinet Secretary for Wellbeing Economy, Fair Work & Energy

**Sent:** Monday, May 22, 2023 12:03 PM

**To:** Public Engagement Unit <CorrespondenceUnit@gov.scot>

**Cc:** Cabinet Secretary for Wellbeing Economy, Fair Work & Energy <CabSecWEFWE@gov.scot>

**Subject:** FW: Global Ethical Finance Initiative Update Letter to Mr Gray (22 May 2023)

For diary please.

Many thanks.

Kind regards,

[redacted s 38 -personal information]

Assistant Private Secretary | Office of the Cabinet Secretary for Wellbeing Economy, Fair Work and Energy – Neil Gray MSP

Scottish Government | St Andrew's House | Regent Road | Edinburgh | EH1 3DG | Email:  
CabSecWEFWE@gov.scot

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**From:** Chris (GEFI) <[redacted s 38 -personal information]@gloablethicalfinance.org>  
**Sent:** 22 May 2023 11:38  
**To:** Cabinet Secretary for Wellbeing Economy, Fair Work & Energy <CabSecWEFWE@gov.scot>  
**Cc:** Omar (GEFI) <[redacted s 38 -personal information]@gloablethicalfinance.org>; [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Subject:** Global Ethical Finance Initiative Update Letter to Mr Gray (22 May 2023)

Dear Mr Gray,

Please find attached a letter from Global Ethical Finance Initiative (GEFI) CEO Omar Shaikh to update you on our work and request an introductory meeting.

We look forward to hearing from your office soon.

Best regards,

Chris

**Chris Tait** | Chief Operating Officer



M: +[redacted s 38 -personal information]

[www.gloablethicalfinance.org](http://www.gloablethicalfinance.org)

\*\*\*\*\*

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46. Invitation



Neil Gray MSP  
Cabinet Secretary for Wellbeing Economy, Fair Work and Energy  
The Scottish Government St. Andrew's House Regent Road  
Edinburgh EH1 3DG

Monday  
22 May  
2023

Dear Mr Gray,

**Re: Global Ethical Finance Initiative Update**

Firstly, I would like to extend my congratulations on your appointment as Cabinet Secretary for Wellbeing Economy, Fair Work and Energy and I trust that you are settling well into the new role.

As you consider your strategies for economic growth, I thought it would be timely to introduce you to the Global Ethical Finance Initiative (GEFI) with a view to scheduling a meeting to discuss how we can build on our existing work with Scottish Government positioning Scotland as a global leader in sustainable finance.

The financial services sector is central to the economy and, with a commitment to a just transition, a unique heritage, and a track record in ethical finance, Scotland is well placed to be a leading centre for green and sustainable finance. That is why, following Glasgow COP, Scottish Government asked GEFI to lead a Taskforce, bringing together Scottish-based financial institutions and financial services stakeholders from across the UK, to develop and oversee an action plan to capitalise on the opportunities of financing the global shift to net zero.

The Taskforce members have recognised that senior positions are drifting south, and that the % of total UK assets managed in Scotland is falling. Ambitions for the future success of Scotland as an internationally renowned centre for green and sustainable financial services are set against this context, and it is important that any migration of the Scottish finance industry is addressed, and that the growth and development of the financial services ecosystem is prioritised by both industry and government.

Scottish Government has supported GEFI over the last two years and our work has contributed to Edinburgh and Glasgow's improved rankings in the Global Green Finance Centre Index. We have over 15,000 financial services professionals engaged globally, we are known for our flagship annual summit (that attracts major institutions such as World Bank, European Investment Bank) and our high-profile Path to COP28 campaign - the first and largest finance focused campaign for COP28.

We are working closely with your officials on how we can connect global finance with investable green projects to deliver net zero and maximise the benefits of Scotland's unique biodiversity and natural capital.

The interim report of the Taskforce is attached, and I would invite you to join the next meeting in Edinburgh on 21st June 2023. Ethical Finance Global 2023 will take place in September and we welcome your participation alongside global financial institutions.

The coming years will be defining for Scotland's place in global financial services and building a green and sustainable sector that delivers a just transition, and gives Scotland a unique competitive position. GEFI stands ready to support Scottish Government in its ambitions.

My colleague Chris Tait ([\[redacted s 38 -personal information\]@globlethicalfinance.org](mailto:[redacted s 38 -personal information]@globlethicalfinance.org)) can liaise with your office to find a date and time to debrief you on our work to date and discuss our plans.

Yours sincerely,

**[redacted s 38 -personal information]**

**Omar Shaikh**

Managing Director, Global Ethical Finance  
Initiative [\[redacted s 38 -personal information\]@globlethicalfinance.org](mailto:[redacted s 38 -personal information]@globlethicalfinance.org)

**Private and confidential containing commercially sensitive information.**

47. Response

**Cabinet Secretary for Wellbeing Economy, Fair Work and Energy**

Rùnaire a' Chaibineit airson Eaconamaidh do Mhath Dhaoine, Obair Chothromach is Cumhachd

Neil Gray MSP/BPA

.....Column Break.....**abcd**

T : [redacted s 38 –personal information]

E : [scottish.ministers@gov.scot](mailto:scottish.ministers@gov.scot)

Chris Tait [\[redacted s 38 -personal information\]@globlethicalfinance.org](mailto:[redacted s 38 -personal information]@globlethicalfinance.org)

Our Reference: 202300359626

8 June 2023 Dear Chris

Thank you for your letter dated 22 May inviting Neil Gray, MSP, Cabinet Secretary for Wellbeing Economy, Fair Work and Energy to discuss the ongoing work of the Global Ethical Finance Initiative (GEFI); how we can continue the work to position Scotland as a global leader in sustainable finance and the invitation to the next meeting of the Scottish Taskforce for Green and Sustainable Financial Services on 21 June 2022

Unfortunately, due to prior commitments, Mr Gray will be unable to accept your kind invitation however I understand you have also written to Mr Lochhead, Minister for Small Business, Innovation and Trade. Mr Lochhead would be delighted to meet with you, dependent on diary commitments.

Please accept his apologies and best wishes for a successful Taskforce meeting.

Yours sincerely,

**[redacted s 38 -personal information]**  
**Private Secretary**

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Tha Ministearanna h-Alba, an luchd-comhairleachaidh sònraichte agus Rùnaire Maireannach fo chumhachan Achd Coiteachaidh (Alba) 2016. Faicibh [www.lobbying.scot](http://www.lobbying.scot)



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**From:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Sent:** Friday, January 7, 2022 1:02 PM  
**To:** Public Engagement Unit <CorrespondenceUnit@gov.scot>  
**Cc:** Cabinet Secretary for Finance and Economy <CabSecFE@gov.scot>  
**Subject:** FW: Scottish Taskforce for Green and Sustainable Financial Services - CabSec Request

Good afternoon

PEU ~ Please can you upload the email below to MiCase as diary case and assign to me please

David/Private Office ~ for information and I will complete as appropriate for MR response

Kind regards

[redacted s 38 -personal information]

 gov.scot [redacted s 38 -personal information] | Team Leader ESG Financial Services and Fintech | Scottish Government | M:  
07917660131



**From:** Chris (GEFI) <[redacted s 38 -personal information]@globalethicalfinance.org>  
**Sent:** 07 January 2022 11:07  
**To:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>;  
[redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>  
**Cc:** [redacted s 38 -personal information] <[redacted s 38 -personal information]@gov.scot>;  
[redacted s 38 -personal information]  
**Subject:** Scottish Taskforce for Green and Sustainable Financial Services - CabSec Request

Morning [redacted s 38 -personal information],

I am writing in my capacity as Secretariat of the Scottish Taskforce for Green and Sustainable Financial Services.

I have included below an email request from the Taskforce Chair **[redacted s 38 -personal information]** and we would be grateful if you were able to share this with the office of the Cabinet Secretary for Finance and the Economy.

Please let me know if you require any further information.

Best regards,

Chris

### **Scottish Taskforce for Green and Sustainable Financial Services Request**

Dear Cabinet Secretary,

Thank you again for the invitation to Chair the Scottish Taskforce for Green and Sustainable Financial Services.

I have been in regular contact with colleagues at Scottish Government and GEFI and I am very much looking forward to playing my part in this exciting initiative.

Having reviewed the Terms of Reference (and associated documents) I believe there is an excellent opportunity for Scotland to position the Taskforce as a practical follow up to COP26. At COP26, through the Glasgow Financial Alliance for Net Zero (GFANZ), a global coalition of leading financial institutions committed to accelerating the decarbonization of the economy. The Taskforce presents a unique opportunity, at the national level, for the financial services sector in Scotland to work together to demonstrate global leadership in implementing GFANZ roadmaps.

As the host of COP26, and with a strong heritage in finance, I believe this approach will support the promotion of Scotland as a world-leading centre for green and ethical finance.

With that in mind, I would propose that you write to **[redacted s 38 -personal information]** (Chair, GFANZ and UN Special Envoy on Climate Action and Finance) to invite his support and participation in a Taskforce launch event in late February / early March. I would also propose we invite the Economic Secretary to the Treasury and City Minister. He has spoken of the need to establish the UK as a green financial centre, and his participation would help ensure that Scotland's role is embedded into the UK Government's green finance offer. I am happy to work with the GEFI team to assist in both drafting the letters and sounding out Mark and John's office privately.

I will be attending the inaugural Financial Services Growth and Development Board and, if diaries permit, it would be great to meet you in advance of the Taskforce meeting on 2<sup>nd</sup> February.

Best regards,

[redacted s 38 -personal information]

[redacted s 38 -personal information]

**Chair, Scottish Green and Sustainable Financial Services Taskforce**

**Chris Tait** | Chief Operating Officer



M: +[redacted s 38 -personal information]

[www.globalethicalfinance.org](http://www.globalethicalfinance.org)

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49. Response

**Cabinet Secretary for Finance and the Economy** Rùnaire a' Chaibineit airson Ionmhas agus na h-  
Eaconamaidh  
**Kate Forbes BPA/MSP**

.....Column Break..... **abcd**

T : [redacted s 38 -personal information]

E : [scottish.ministers@gov.scot](mailto:scottish.ministers@gov.scot)

Chris (GEFI) [redacted s 38 -personal information]@[globalethicalfinance.org](mailto:globalethicalfinance.org)

Our Reference: 202200270475

Your Reference: FW: Scottish Taskforce for Green and Sustainable Financial Services - CabSec Request

26 January 2022 Dear Chris,

Thank you for your letter of 7 January inviting Kate Forbes MSP, Cabinet Secretary for Finance and the Economy, to an introductory meeting with **[redacted s 38 -personal information]**, chairperson of the new Scottish Green and Sustainable Financial Services Taskforce.

Ms Forbes would be delighted to accept your invitation.

As agreed with David's office, the virtual meeting has been agreed for Thursday 27 January 2022 at 17:30 - 18:00.

A Teams invite has been sent to David's office.

Yours sincerely

**[redacted s 38 -personal information]**

**[redacted s 38 -personal information]**  
Private Secretary

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Tha Ministearanna h-Alba, an luchd-comhairleachaidh sònraichte agus Rùnaire Maireannach fo chumhachan Achd Coiteachaidh (Alba) 2016. Faicibh [www.lobbying.scot](http://www.lobbying.scot)



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50. Invitation

Rùnaire a' Chaibineit airson Ionmhas agus na h-Eaconamaidh

Cabinet Secretary for Finance and Economy

Ceit Fhoirbheis BPA

Kate Forbes MSP

αβχδ

T: **[redacted s 38 -personal information]**

E: [scottish.ministers@gov.scot](mailto:scottish.ministers@gov.scot)

Mr **[redacted s 38 -personal information]** [\[redacted s 38 -personal information\]@hmtreasury.gov.uk](mailto:[redacted s 38 -personal information]@hmtreasury.gov.uk)

[\[redacted s 38 -personal information\]@hmtre](mailto:[redacted s 38 -personal information]@hmtre)

01 February 2022

Dear Mr **[redacted s 38 -personal information]**,

## **Re Invitation to join the Launch of the Scottish Taskforce for Green and Sustainable Financial Services**

The Scottish Government is keen to support advances made in climate finance at COP26 in Glasgow. Accordingly, in our recent Programme for Government, we announced a new industry-led Green and Sustainable Financial Services Taskforce to help develop Scotland's action plan to capitalise on the opportunities of financing the global shift to net zero. As a practical output of COP26 the Taskforce presents a unique platform for the financial services sector in Scotland to work together to demonstrate global leadership. We would like to invite you to help us launch the Taskforce.

A key focus will be implementing Glasgow Financial Alliance for Net Zero roadmaps. This is important both for Scotland and the UK, and I know we are both keen that one legacy of Glasgow be the establishment of the UK - London, Edinburgh, Glasgow and elsewhere-- as a centre of Green Finance, both for our own benefit and for the world.

We have asked the Global Ethical Finance Initiative (GEFI), with the support of Scottish Financial Enterprise, to convene the Taskforce. It will report bi-annually on progress and provide policy recommendations to the Financial Services Financial Services Growth and Development Board chaired by the First Minister. **[redacted s 38 -personal information]** has agreed to Chair the Taskforce with **[redacted s 38 -personal information]** and **[redacted s 38 -personal information]** amongst the high-profile members.

---

I would like to personally invite you to join Dr Mark Carney and I to participate in the virtual public launch scheduled to take place at **15:30 – 16:30 (GMT) on Monday 28<sup>th</sup> February 2022**. As stakeholders seek to move from talk to action following COP26 your contribution will be an important global signal that the UK's finance offer extends beyond London.

I will request that Taskforce Secretariat Chris Tait picks up with your office. I understand that you know Chris through his work at the Islamic Finance Council UK.

We welcome your consideration and early confirmation to support the launch of the Taskforce at this critical moment for the financial services industry, the global economy, and our planet.

Yours sincerely,