

Private Equity
International

Responsible Investment Forum: Europe

London 2023

PEI Responsible Investment Forum: Europe Agenda

The leading global event for ESG in private markets

8 - 9 November 2023 | London

Day One: 8 Nov

7:30 Breakfast in a private room for GPs and LPs

Investing in a sustainable future: How private equity firms catalyse climate action for higher valuations

Private equity firms are emerging as pivotal agents of change in the global battle against climate change. Join this breakfast roundtable session to discuss the indispensable role that private equity plays in promoting climate action throughout their portfolio companies.

Facilitator: Aarthi Paul, TBD, Patch

8:30

Introduction from PEI & PRI

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8:45

Chairpersons opening remarks

Christopher Springham, Formerly VP - Communications and Sustainability, **LM Wind Power GE Renewable Energy Business**

8:50

Fireside chat: the PRI in a changing world

James Holley, Partner, ESG Transaction Services & Private Equity, **KPMG in the UK**

In conversation with

David Atkin, CEO, **UNPRI**

9:15

ESG Data Convergence Initiative update: creating value for GPs and LPs in private equity

- What has the EDCI learnt about ESG in Private Equity from the second year of the initiative?
- To what extent is the initiative helping LPs and GPs to solve the data challenge?
- How firms leverage the data to gain new insights and drive value creation
- How is technology helping the EDCI?
- What's next for the initiative in 2024?

Moderator: **Ben Morley**, Partner and Associate Director, **BCG**

Maaïke van der Schoot, Head of Responsible Investment, **AlpInvest Partners**

Chloe Sanders, Head of ESG, **CVC Capital Partners**

Allegra Day, ESG Director, **Cinven**

Toby Robertson, Head of Europe, **Green Project Technologies**

10:00

GP/LP data dialogue: taking steps to resolve the ESG data challenge

- To what extent can data standardisation be a distraction from value creation?
- Where are GPs pushing back on data requests?
- Overcoming issues with sharing portfolio company data
- Strategies for reducing the workload for GPs

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Moderator: **Owen Riddall**, Co-founder and Chief Product Officer, **Novata**
Anna Foller, Head of Sustainability, **AP6**
Michael Marshall, Head of Sustainable Ownership, **RPMI Railpen**
Abrielle Rosenthal, Chief Sustainability Officer, **Towerbrook**
Tricia Winton, Partner and Global Head of ESG, **Bain Capital**

10:40

Coffee & networking

11:15

How should heads of sustainability work with the investment team?

- What does a good working relationship with the deal team look like?
- Getting a seat at the table at each stage of the investment process
- How to manage frictions with deal partners with other priorities
- Examples of sustainability heads influencing investment decisions

Moderator: **Tomas Sys**, Principal, UK M&A and ESG Advisory Lead, **Ramboll**
Adam Black, Partner, Head of ESG & Sustainability, **Collier Capital**
Aurelie Hariton-Fardad, Managing Director, Head of EMEA Client Portfolio Management, **MetLife Investment Management**
Paul Lamacraft, Head of ESG, Private Equity, **Schroders Capital**
Rhea Hamilton, Managing Director, **General Atlantic**

11:55

The private markets decarbonisation roadmap: driving action on climate with iCI and the Sustainable Markets Initiative Private Equity Taskforce

- Creating a pathway for PE on climate action
- Why are private markets different to public markets when it comes to approaching decarbonisation?
- Balancing a growing portfolio while taking steps to decarbonise
- Considering how companies contribute to decarbonisation, while creating value

Moderator: **Marc Lino**, Senior Partner, Global ESG Leader for Private Equity, **Bain & Company**
Serge Younes, Head of Sustainability, **Investindustrial**
Helen Hopkins, Senior Responsible Investment Analyst, **USS Investment Management**

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Jarlyth Gibson, Global Head of ESG, **Advent International**

Ivo Dimov, Associate Director, Sustainability & ESG, **ICG**

12:35

Tech case study: how a private equity investor has used technology to deliver on ESG goals

- What ESG challenges technology can and cannot solve
- What it takes to implement technology
- How to use technology intelligently to achieve ESG goals
- Future trajectory of ESG technology

Joshua Brunert, Global Head of ESG Product Development, **Apex Group**

in conversation with

Yohan Hill, Director of ESG and Responsible Investing, **Adams Street Partners**

12:55

Climate portfolio case study: practical example of how a PE manager has addressed climate across a growing and diverse portfolio of investments

13:15

Lunch

<u>Track A – Impact Investing</u>	<u>Track B – Data & Regulation</u>	<u>Track C – ESG in other Asset Classes</u>	<u>Track D – B-Corps, Stewardship</u>
<u>14:15</u> Impact investing in a time of uncertainty and urgency <ul style="list-style-type: none">• The role of private and institutional impact investors in driving positive change• How will economic disruption impact appetite for impact investing?	<u>14:15</u> Using ESG data to maximise returns throughout the investment process <ul style="list-style-type: none">• Using ESG data during due diligence• Integrating ESG data into value creation plans	<u>14:15</u> Maintaining ESG as a priority in infrastructure investing <ul style="list-style-type: none">• How infrastructure can help contribute to goals of the Paris agreement• Update on article 8 and article 9 funds across infrastructure• To what extent is greenwashing a problem in infrastructure?	<u>14:15</u> B-Corps and Private Equity: The Benefits and Challenges of Adopting a Purpose-driven Business Model <ul style="list-style-type: none">• Why are Private Equity managers becoming certified B-Corps?• Why are more portfolio companies adopting this business model, and what are the benefits for PE owners?

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<ul style="list-style-type: none"> How are investors addressing other pressing challenges such as the cost-of-living crisis and global food security? <p>Moderator: Liz Ming, ESG Audit Partner, KPMG in the US Eleanor Blagbrough, Co-Founding Partner, Blume Equity Nicolas Muller, Managing Director (Head of Funds & Co-Investments), Blue Earth Capital Charlotte Ward, Head of Financing Solutions, Unilever Climate and Nature Fund</p>	<ul style="list-style-type: none"> How ESG data can be used to highlight value to the next buyer <p>Moderator: Maria Liby-Troein, Associate Partner, Bain & Company Heleen van Poecke, Co-founder and CEO, KEY ESG Helena Hausen, Head of ESG and Investment Manager, Beyond Capital Partners Elena Mariotti, Managing Director, Cerberus</p>	<p>Moderator: Jennifer Wilson, CEO & Founder, Re:Co Gwen Colin, Head of ESG and Partner, Vauban Infrastructure Partners Kashif Khan, Director, Infrastructure & Project Finance, MetLife Investment Management Mary Nicholson, Head of Responsible Investment, Macquarie Asset Management Lee Coker, ESG Advisor, Digital Bridge</p>	<ul style="list-style-type: none"> What are the legal implications of becoming a B-Corp, and how does this affect PE firms and their private equity investments? <p>Jennifer Flood, Sustainability, Head of North America, Investindustrial Robert Sroka, Partner, Abris Capital Partners Ellinor Schrewelius, Director, IR & Business Development, Verdane</p>
<p>14:55 Impact allocators panel: overview of investment priorities and strategies</p> <ul style="list-style-type: none"> Is impact as an investment lens, or should it be an investment bucket in LP portfolios? How are allocators filtering their investing strategies? What issues are getting funding, and which aren't? <p>Anita Bhatia, Investment Director, Guy's and St Thomas' Foundation Rames Munschizada, Vice President, Alpha Associates Sofia Bartholdy, Net Zero Lead,</p>	<p>14:55 Data in, data out: why engagement is key to driving good data</p> <ul style="list-style-type: none"> Building the business case for portfolio companies Having closed-loop feedback to demonstrate how you are using the data Highlighting the exit/IPO value of ESG <p>Moderator: Charles Avery, Reporter, New Private Markets Alejandra Miranda, Head of Capital Markets & ESG Finance, Europe, EcoVadis Ellen De Kreij, Lead Advisor, ESG</p>	<p>14:55 How are private debt managers implementing ESG</p> <ul style="list-style-type: none"> How to add value to investments through a sustainability lens as a debt provider How can lenders ensure real impact rather than greenwashing? The rise of green and sustainability link loans <p>Niamh Whooley, MD, Head of Sustainable Investing, Pemberton Asset Management Salma Moolji, Principal, European ESG Lead, Ares Asset Management Andrew Bellis, Head of Private Debt,</p>	<p>14:55 Defining what is meant by stewardship for private equity</p> <ul style="list-style-type: none"> How does stewardship apply to private equity investing? Fiduciary duty vs stewardship: is there tension between them? What are the responsibilities of PE managers in terms of stewardship? <p>Moderator: Ross Sheil, GM, EMEA & APAC, Cloverly Marie Ang, Investment Director, Sustainable and Impact Investing, Cambridge Associates Dr. Stephanie Mooij, ESG & Impact Manager, Gilde Healthcare</p>

Responsible Investment, Church Commissioners for England Amelie Busch , Investment Director, Big Society Capital	Practice, Apax Partners Jessica Peters , Head of ESG, Argos Wityu	Partners Group Maarten Biermans , ESG & Investor Relations, Prow Capital	Will Relle , Director, ESG, HarbourVest Partners
15:30 Coffee & networking			
16:00 Impact's role in the energy transition <ul style="list-style-type: none"> • Opportunities for impact funds in the energy transition space • Are energy transition investments impact by default? • How are ET funds demonstrating impact in terms of measurement and reporting? Moderator: Toby Mitchenall , Senior Editor, ESG & Sustainability, New Private Markets Matthew Harwood , Chief Strategy Officer, Climate Investment Shami Nissan , Partner, Sustainability, Actis Phil Davis , Director of ESG, Helios Investment Partners Aine Higgins , Head of ESG, NTR	16:00 Practical tips for SFDR alignment <ul style="list-style-type: none"> • Where to start on SFDR implementation • Article 8 vs. 9: the benefits of opting for one vs. the other • Utilising technology in SFDR compliance Moderator: Anne Kvam , Director Sustainable Finance, Position Green Patricia Volhard , Partner, Debevoise & Plimpton Marta Jankovic , Head of Sustainability, Stafford Capital Partners Rebecca Svensoy , Head of ESG and General Counsel, FSN Capital	16:00 Built environment decarbonisation: ESG implementation in real estate <ul style="list-style-type: none"> • Can commitments to net-zero increase returns? • How real are the risks to not acting on net zero? • ESG considerations in different sub-sectors of real estate, e.g. offices vs resi vs logistics? Claire McIntyre , Senior Vice President and Head of Corporate Affairs, Oxford Properties Group Cath Webster , CEO, PfP Capital Laurent Lavergne , Global Head of Sustainability, AXA IM Alts Charlie Jacques , Head of Impact, Real Estate, Schroders Capital	16:00 Workshop: Executing decarbonisation plans to drive value creation <ul style="list-style-type: none"> • Decarbonisation Roadmap: building dynamic plans for PE • Overcoming execution hurdles and pain points • Sharing ideas between your portfolio Facilitator: Alaric Marsden , Partner - Corporate Sustainability & Climate Change, ERM

<p>16:45 Impact value creation toolbox: how to generate value from an impact strategy</p> <ul style="list-style-type: none"> • How is value creation different for impact funds to other PE strategies? • To what extent do value creation plans and impact creation plans need to be integrated? • How do funds influence portfolio companies to deliver impact performance? <p>Moderator: Greg Fischer, Dr, BCG Keimpe Keuning, Principal, LGT Capital Partners Robert Davies, Director, Development Impact, British International Investment Philip Krinks, ESG Specialist, Agilias Jérôme Kamm, Investment Director – Direct Equity, Hamilton Lane</p>	<p>16:45 Compliance: outlining what investors require on climate data</p> <ul style="list-style-type: none"> • To what extent will climate and net-zero considerations be integrated into mandates? • Best practices for data compliance • Overcoming data challenges to help pension funds meet mandatory requirements 	<p>16:45 The evolution of ESG in venture capital</p> <ul style="list-style-type: none"> • Making the business case for ESG in venture capital • Do VCs have the necessary resources and time to do ESG effectively? • Case studies of successful ESG implementation in venture capital <p>Dr. Silva Deželan, Head of Impact & ESG, Forbion Baudouin Hue, Partner, Kartesia Misa Andriamihaja, Private Equity and Venture Capital Lead, Institutional Investors Group on Climate Change (IIGCC) Daryl Kennedy, Investor Relations and ESG Manager, Piva Capital</p>	<p>16:45 Workshop: Practical guidance on how to start the CSRD journey</p> <ul style="list-style-type: none"> • What is the CSRD and how it will impact responsible investing? • Key dates to look out for • How the CSRD will impact non-EU entities • How to consider double materiality <p>Patrick Moloney, Director, Ramboll Dina Kusnezowa, Manager, Sustainable Finance, Ramboll</p>
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17:30

Close of day one of conference followed by cocktail reception

Day Two: 9 Nov

8:00-8:50

GPs Breakfast Roundtable

Discuss key ESG challenges (e.g., in relation to ESG data collection and reporting) over breakfast with other GPs as part of an off-the-record, facilitated group conversation

Hosted by Invest Europe

Erika Blanckaert, Senior Public Affairs Manager - Head of Sustainability, **Invest Europe**

LP Breakfast Roundtable

Discuss key ESG challenges over breakfast with other LPs as part of an off-the-record, facilitated group conversation

Hosted by ILPA

Matt Schey, Senior Director, External Affairs and Sustainable Investing, **ILPA**

8:55

Opening Remarks

9:00

Aligning Private Equity Toward Net Zero

- What Guidance is available? -- NZIF, iCI and SBTi
- How the Guidance overlaps and complements each other
- What are the challenges and opportunities associated with setting net zero targets for PE?
- Best practices for setting and implementing net zero targets

Moderator: **Katharina Neureiter**, Head of ESG, EMEA & APAC, **Carlyle**

Myles Tatlock, Principal Consultant, **Anthesis**

Serge Younes, Head of Sustainability, **Investindustrial**

Graeme Ardus, Head of ESG, **Triton**

Adinah Shackelton, Head of ESG, **Permira**

9:40

Practical tips to avoid greenwashing in private equity investing

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- Examples of greenwashing in PE investing and learnings from experiences
- How can investors spot greenwashing from managers?
- What specific and verifiable data points should LPs use to gauge veracity of ESG claims?
- Given the backlash on ESG in the US, to what extent is ‘greenhushing’ a growing phenomenon?

Moderator: **Eric Bloom**, Chief Operating Officer & Head of Client Solutions, **Re:Co**

Yadaira Orsini, Associate Director: ESG, **Control Risks**

Blandine Machabert, Head of Impact Management and Measurement, **RAISE**

Iman Kara, Director, Infrastructure, **Brookfield Asset Management**

Colin Etnire, Head of ESG, **BC Partners**

10:20

Climate liability: time to futureproof your business

- Some international trends and developments – climate change laws and litigation cases
- Ways in which strategic climate litigation is being used
- How these changing laws and cases impact directors and Private Equity Board members?
- With such a fast-changing legislative landscape, how can PE funds ensure best practice to measure and manage climate-related legal risk?

Moderator: **Angus Duncan**, Executive Director – D&O Coverage Specialist and Product Development Specialist, **WTW**

Hannah Tindal, Head of D&O, Regional Unit London & Nordics, **Allianz Commercial**

Michelle Radcliffe, Director, Insurance Consulting & Technology, **WTW**

Lindee Wong, Director of Climate and Biodiversity, **Tikehau Capital**

11:00

Coffee & networking

11:30

Mitigating supply chain risk in private equity

- Which issues are funds focusing on when it comes to supply chain ESG risks at their portfolio companies?
- With emerging legislation in EU such as the CSDDD, how much are human rights risks a concern for PE funds?
- What tools, frameworks and tech can aid supply chain risk mapping?
- Working with portfolio companies to deliver more resilient supply chains

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Moderator: **Daniel D'Ambrosio**, Partner – ESG & Impact, **Kirkland & Ellis**
Dorte Hoppner, Chief Sustainability Officer, **The Riverside Company**
Sabine Chalopin, Head of ESG, **Denham Capital**
Cornelia Gomez, Global Head of ESG, **General Atlantic**
Peter Dunbar, Principal – Responsible Investment, **StepStone Group**

12:05

Making biodiversity and natural capital relevant to PE investing

- TNFD V4.0: what does it mean for investors?
- Leveraging biodiversity data in investment decisions
- To what extent does work on biodiversity interlink with climate strategy?
- Outlining LP expectations on how GPs should address biodiversity

Moderator: **Kerstin Pfliegner**, Partner Corporate Sustainability and Climate Change, **ERM**
Susanne Røge, Head of ESG, **ATP Private Equity Partners**
Marie-Anne Vincent, VP Climate Finance, **Sweep**
Peter Bachmann, Managing Director, **Gresham House**
Eimear Palmer, Partner, Global Head of ESG, **Pantheon Ventures**
Siddarth Shrikanth, Associate, **Just Climate**

12:50

Leveraging Generative AI to detect ESG controversies in private companies

- Discussing the unprecedented evolution in Generative AI
- How is this causing disruption in the financial sector?
- Concrete use cases of Generative AI in Finance
- Outlining some of the benefits and predictions for future uses

Leo Shamash, Sales Engineer & Account Manager, **SESAMm**

13:15

Lunch

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14:00

Workshop: What data looks like for sustainability reporting in private equity

- Challenges with data – pain points when reporting
- Tools, resources, best practice – what does good look like? How can we improve the quality of data?
- Key takeaways, opportunities, best practice advice

Facilitator: **David Wynn**, Director of Product Marketing (Sustainability), **Cority**

15:00

Regulatory workshop: sustainability regulation for private markets

Led by Travers Smith, their ESG & Impact experts will lead small group roundtables to discuss the latest developments in regulation and practical approaches to them.

Simon Witney, Senior Consultant, **Travers Smith**

Tim Lewis, Head of Financial Services & Markets, **Travers Smith**

16:00

Close of conference

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