

New  
Private Markets

# Impact Investor Global Summit

London 2023

## The Impact Investor Global Summit 2023

*Today's capital. Tomorrow's generation.*

16-17 May

### Day one: 16 May

08:00

Registration and networking breakfast

08:55

Opening remarks from the chair

Xenia Loos, Co-Founder, Partner, **Collective Action**

09:00

Opening keynote: **Economics of climate change and investment priorities in the transition**

Hear one of world's leading climate change economists, Dimitri Zenghelis, explore how the fast-changing macroeconomic and geopolitical picture is likely to impact the evolution of climate-related investing.

The keynote presentation will explore such questions as:

- Can we achieve net zero and is a 1.5 degrees scenario still possible?
- Rapidity of the transition to clean technologies, and how might investors profit from the changing landscape of risk and opportunity?
- What will be the impact of the polycrisis (inflation, rising interest rates, Europe's energy crisis, war in Europe) on decarbonisation efforts?
- What role can impact investing play in overall decarbonisation efforts globally?
- What sectors and strategies should be prioritised for investment for their impact potential?

**Dimitri Zenghelis**, Special Advisor for the Wealth Economy Project, at the Bennett Institute, **University of Cambridge**, and is a Senior Visiting Fellow at the Grantham Research Institute at the **London School of Economics**

09:20

Opening panel: **Impact investing in a time of uncertainty and urgency**

- Impact investing has arisen in a time of low opportunity cost, how will the market unfold in the coming years in a global economic crisis?

Visit the [agenda page](#) for the latest updates.

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- The UN has reported we are on course for a 2.9 degrees world, nearly double the 1.5 target, what fundamentally needs to change to create urgency in meeting net zero goals?
- How are investors addressing other pressing challenges such as the cost-of-living crisis and global food security?
- Has income inclusion, arguably the original purpose of impact investing, fallen off the agenda?

Dimple Sahni, Managing Director Impact Funds Portfolios, **Anthos Fund & Asset Management B.V.**

Andrew Lee, Managing Director, Global Head of Sustainable and Impact Investing, **UBS Global Wealth Management**

Moderated by Laurie Spengler, CEO, **Courageous Capital Advisors**

**10:00**

## **Impact allocators panel: overview of investment priorities and strategies**

- Is impact as an investment lens, or should it be an investment bucket in LP portfolios?
- What are the allocation priorities of institutional investors?
- What is the opportunity universe and how are allocators filtering their investing strategies?
- What's issues are getting funding, and which aren't?

Carlotta Saporito, Head of Global Impact Investing, **J.P. Morgan Private Bank**

Yasemin Saltuk Lamy, Managing Director and Head of Asset Allocation and Capital Solutions, **British International Investment**

Willem Huidekoper, Head of Non-listed Equities, **IMAS Foundation**

Marieke van Kamp, Head of Private Markets, **NN Group**

**10:45**

## **Morning break**

**11:15**

## **Keynote: Fiduciary Duty in the 21st Century – how can pension funds allocate more to address climate change?**

- Does the principle of fiduciary duty for pension funds need be reformed to meet the climate emergency?
- How can pension funds better structure themselves for investing in transition solutions?

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- How is the ESG debate and legislative battle in the US states of Texas and Florida unfolding and what will be the legal implications for pension looking to make climate-orientated investments?
- Can climate investments always be focused on market-rate returns, and if not, will a concessionary approach be needed to foster capital flow to climate solutions?

11:45

## Leading fund managers' panel: the landscape of impact and thematic investment opportunities

- How will investor appetite for generalist, specialist and thematic impact strategies influence the evolution to products on the market?
- What role will specialisation play in the evolution of the impact market?
- To what extent is the 'do not compromise on returns' statement disingenuous, what is the real trade-off between impact and returns?
- Where are investors finding the best risk-adjusted returns in a global recessionary environment?

Coralie De Masschalck, Head of CSR & ESG, **Kartesia**

Tai Lin, Managing Partner, **Proterra Asia**

12:30

Lunch

*After lunch the conference splits into four streams, the streamed sessions are designed for you to hear about the latest investment opportunities from best-in-theme managers and get detailed insights on innovations on the horizon.*

	Environmental Impact	Inclusive Impact	Energy transition	Impact Innovation
13.30	Environmental impact and natural capital: where are the most investable opportunities?	Impact to address wealth inequality: deep dive into employee ownership funds Jack Moriarty, Founder &	Impact's role in the energy transition Peter Fox Penner, Chief Impact Officer, <b>Energy Impact Partners</b>	Towards 100% impact: Approaches to mission-aligned investing

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	<p>Moderated by Alison Humphrey, Advisor, ESG, <b>PJT Partners</b> Fabio Ranghino, Partner, Head of Sustainability &amp; Strategy, <b>Ambienta</b> Robert Schultz, Partner, <b>Capricorn Investment Group</b> Anja Graef, Managing Principal, Head Impact Private Markets, <b>HSBC Alternative Investments</b> <b>Steven King,</b> <b>Senior Vice President, Business Development, Resource Management Service</b></p>	<p>Executive Director, <b>Ownership America</b> Jon Shell, Managing Director and Partner, <b>Social Capital Partners</b></p>	<p><b>Maurice Klaver,</b> Senior Investment Manager, Private Equity, <b>PGGM</b> <b>Andrew Bujtor,</b> Managing Director, <b>Low Carbon</b></p>	<p><b>Wren Laing,</b> Investment Director, <b>McConnell Foundation</b>  <b>Anita Bhatia,</b> Investment Director, <b>Guy's and St Thomas' Foundation</b></p>
14.30	<p><b>Climate impact in food systems and sustainable agriculture</b> Ashish Kumar, Climate &amp;</p>	<p><b>Next generation of impact investments in diversity, equity, and inclusion</b> Liz Roberts, Head of Impact</p>	<p><b>Climate 2.0: Investing for climate impact</b>  <b>Nick Abel,</b> Portfolio Manager, Sustainable</p>	<p><b>Innovations in fund structures and incentives</b> Jonny Page, Head of Social and Impact Investment,</p>

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	<p>Innovation Lead, <b>Shell Foundation</b></p> <p><b>Ali Floyd</b>, Managing Director, <b>Campbell Lutyens</b></p>	<p>Investing, <b>MassMutual</b></p> <p><b>Matt Penneycard</b>, Partner, <b>Ada Ventures</b></p>	<p>Investments, <b>CalSTRS</b></p> <p><b>Misa Andriamihaja</b>, Senior Investment Specialist, <b>Institutional Investors Group on Climate Change</b></p>	<p><b>Esmee Fairbairn Foundation</b></p> <p><b>Delilah Rothenberg</b>, Co- Founder &amp; Executive Director, <b>The Predistribution Initiative</b></p>
15.15	Networking Break			
16.00	<p><b>Circularity investment: how to invest in the circular economy?</b> Tazia Smith, Chief Operating Officer &amp; Head of Capital Partnerships, <b>Closed Loop Partners</b></p> <p><b>Moderator: Malu van Santen</b>, Co- Founder, Partner, <b>Collective Action</b></p> <p><b>Joe Rodgers</b>, Programme Manager - Finance Initiative, <b>Ellen MacArthur Foundation</b></p>	<p><b>Healthcare impact: overview of leading investment stories</b></p>	<p><b>Hydrogen: is it an investable market?</b></p> <p><b>Gabriel Lepine</b>, VP Strategic Finance, <b>ZeroAvia</b></p> <p><b>Max Gottschalk</b>, Founding Partner, <b>Vedra Partners</b></p>	<p><b>Impact debt: can cost of capital be a meaningful driver of sustainability?</b></p>
16.45	<p><b>Opportunities in Water impact: how can investor</b></p>	<p><b>Place-based investing: what are the best</b></p>	<p><b>Transition mining: Securing the metals supply chain for the</b></p>	<p><b>Impact for the underserved: impact</b></p>

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	<p><b>gain exposure to water?</b> David Henderson, Managing Partner, <b>XPV Water Partner</b> Nick Wood, CEO, <b>Resonance Asset Management</b></p>	<p><b>examples of rejuvenating communities?</b></p>	<p><b>transition to net zero</b> Kevin D'Souza, Chief Sustainability Officer, <b>Resource Capital Funds</b>  Olimpia Pilch, International Partnerships &amp; Business Manager, <b>Critical Minerals Association</b></p>	<p><b>opportunities in emerging markets</b> Eddie Madzikanda, Associate Director - EMEA Investments, <b>Temasek</b> Sophie Robé, Chief Executive Officer, <b>FIIND Impact</b></p>
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17:30

Networking drinks

18:30

Sponsored dinner

## Day two: 17 May

07:30

Networking breakfast

8.30-10.00	<p><b>Impact allocator breakfast and working group: How can LPs balance rigor and practicality in their impact engagement with fund managers? (invite only)</b></p> <p>In this working group, institutional investors and</p>	<p><b>Sponsored GP workshop: How to do a good impact report?</b></p> <p><i>In this workshop we'll provide a deep dive into the current state of reporting in impact investing, lessons learnt,</i></p>	<p><i>These roundtables will be informal, free-flowing and intended to provide you with the opportunity to ask questions and discuss your own experience. Each roundtable will have one speaker to</i></p>
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	<p>allocators will have an opportunity to discuss best practices for engaging with impact fund managers – during screening and due diligence as well as ongoing investment monitoring and management – and how to ensure such impact engagement is both rigorous and practical for different types of fund managers.</p> <p>The group discussion will be facilitated by BlueMark, an impact verification specialist, which will share exclusive data and findings based on its verifications of a large swath of the impact investing industry.</p> <p>Facilitator: <b>Sarah Gelfand</b>, Managing Director, <b>BlueMark</b></p> <p><i>This is an invite-only, off-the-record workshop for qualified institutional investors and allocators. Only 50 slots are available, so please get in touch with Boris Petrovic (<a href="mailto:boris.p@peimedia.com">boris.p@peimedia.com</a>) to secure a place.</i></p>	<p><i>best practices, and what's on the horizon.</i></p> <p>Workshop chair: Diane Damskey, Head of Secretariat, <b>Operating Principles for Impact Management</b></p> <p>Speakers TBC</p> <p><i>This workshop is for GPs only. 50 seats are available, please get in touch with Boris Petrovic (<a href="mailto:boris.p@peimedia.com">boris.p@peimedia.com</a>) to secure a place.</i></p>	<p>kick the discussion off and facilitate. Topics include:</p> <ul style="list-style-type: none"><li>• Using technology to streamline impact investment decisions</li><li>• Blockchain, web 3.0: a dummies guide to their impact application</li><li>• SFDR: how best to align your fund with the regulation</li><li>• Engaging portfolio companies on impact</li><li>• Creating value through impact within the portfolio</li><li>• Getting a handle on scope 3 and 4 emissions: which is the priority?</li><li>• Fundraising for an impact fund: lessons learnt from investor engagement</li></ul>
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10:00

Networking break

10:30

**Complying with regulations: how are practitioners aligning with SFDR?**

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- Impact investing as a concept emerged from the SDGs, how will SFDR alter the definition of impact investing?
- How are practitioners going about aligning their funds with the EU Taxonomy?
- Will we see greater demand and price inflation for assets that are SFDR-aligned?
- Will assets become stranded because of regulation?

**Patricia Volhard**, Partner, **Debevoise & Plimpton**

**Anders Klinkby**, Managing Director Sustainable Finance, **Position Green**

**11:15**

### **How are impact managers balancing outcomes vs reporting priorities?**

- How are fund navigating the difficulty of measuring impact performance within their portfolio companies?
- To what extent should measurement and reporting be a priority for impact investors?
- Is there a leaner, more credible model for understanding outcomes?
- What should be the priority: quantifying and demonstrating Scope 4 abated emissions or measuring and reducing Scope 3 emissions?

Jake Levy, Investment Manager & Impact Lead, **Snowball**

Matthew Harwood, Chief Strategy Officer, **OGCI Climate Investments**

**Sweep**, speaker TBC

**Joe Shamash**, Investment Director, **Big Society Capital**

**12:00**

### **The rise of impact secondaries: investment case, and opportunities for the impact market**

- Is the increase in secondaries activity in impact investing a good thing?
- What are LP views on secondaries in the impact context?
- What is the outlook for secondaries in both LP-led and GP-led transactions (single asset and continuation funds) for 2023?
- What opportunities do secondary structures and vehicles present for impact managers?

**Nicolas Muller**, Managing Director (Head of Funds & Co-Investments), **Blue Earth Capital**

**Adam Black**, Partner, Head of ESG & Sustainability, **Coller Capital**

**12:45**

**Lunch**

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**13:45**

**Data presentation: breakdown of fundraising in the impact market**

**14:00**

**Impact value creation toolbox: how to generate value from an impact strategy**

- 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 through incentives and board composition?
- What support do you need to provide for portfolio company management to deliver against impact goals?

**Elly Thio**, Managing Director, **EQT Partners**

**James Hicks**, Director of Impact Management, **Bridges Fund Management**

**Aglae Touchard le Drian**, Partner, **Raise Impact**

**14:45**

**Keynote**

**15:30**

**Comparing like for like: overview of progress in impact benchmarking**

- Will impact measurements ever reach a financial reporting standard?
- What frameworks are leading impact funds using to demonstrate impact and how comparable are these from an investor's perspective?
- How will data, metrics and reporting practice develop in the coming years?
- Where is innovation still required on benchmarking?

**Juho Uusihakala**, Head of Impact, **Finnfund**

**Clara Barby**, Senior Partner, **Just Climate**

**Jessie Duncan**, Program Manager, **Tipping Point Fund on Impact Investing**

**16:15**

**Closing remarks**

**16:20**

**End of conference**