

Responsible Investment Forum: Europe London 2024

Responsible Investment Forum: Europe 2024 Agenda

Pre-event day: 19 November

18:00-20:00

Responsible Investment Forum Pre-Event Welcome Reception (invitation-only for LPs and GPs)

Begin your networking early at the opening reception taking place at an iconic London location. Enjoy spectacular views of London and expand your network with the brightest leaders in sustainability while indulging in pre-function appetizers, aperitifs, & cocktails.

Sponsored opportunity for 3 service providers to sponsor the event and send 3 attendees

Day One: 20 November

07:30

Breakfast in a private room for GPs and LPs

Hosted by Key ESG

08:45

Chairpersons opening remarks

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

09:00

Proposed topic

Keynote Discussion: General Atlantic partnership with Actis – how sustainability and infrastructure is at the centre of a landmark transaction for private markets

Responsible Investment Forum: Europe London 2024

Gabriel Caillaux, Co-President, Managing Director, Head of Climate, **General Atlantic**
Shami Nissan, Partner, Sustainability, **Actis**

09:25

The continued evolution of the sustainability function within European private equity

- Comparing sustainability team designs: eg inhouse vs. external consultants
- Strategies for ESG leaders to effectively engage with portfolio companies, deal partners, and value creation teams
- To what extent are sustainability heads involved in due diligence processes and throughout the entire investment lifecycle?
- How is AI going to impact the role of sustainability heads? And how is it already being used?

Moderator: **Ramboll**

Michael Marshall, Director of Investment Risk and Sustainable Ownership, **Railpen**

10:00

EDCI Annual Update: leveraging EDCI Insights for value creation

- Presenting the latest discoveries from the EDCI and a deep dive into the data
- Understanding how LPs utilise the data in practice: navigating uniform metric standards while prioritising materiality in benchmarking
- Insights into the correlation between sustainability efforts and financial performance in private markets
- Analysis of findings from the newly introduced net-zero metric: exploring its interaction with the PMDR and NZIF
- Assessing measurable outcomes within individual portfolio companies after three years of implementation: what progress have GPs observed?

Moderator: **Greg Fischer**, Partner & Director, **Boston Consulting Group**

Co-Facilitator: **Ben Morley**, Partner and Associate Director, **BCG**

Katharina Neureiter, Head of ESG & Impact, EMEA & APAC - Global Sustainability, **The Carlyle Group**

Responsible Investment Forum: Europe London 2024

10:40

Coffee & networking

11:10

ICI initiative update: Advancing decarbonisation pathways at both fund and portfolio company levels

- To what extent are firms engaging with SBTI's to validate decarbonisation strategies? Considering why some firms do not plan to set targets
- Practical steps for enhancing data collection, quality, and transparency in implementation efforts
- Exploring the complexities of scope 3 emissions and their status within private markets
- Case studies and guidance to drive emissions reduction through supplier engagement

Mark Fischel, Carbon Product Lead, **Novata**

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

Natasha Buckley, Principal, ESG, **HarbourVest Partners**

11:50

The integration of ESG into value creation plans

- Balancing the long-term positive impact from ESG initiatives when the benefits may be realised by subsequent owners
- Exploring avenues beyond mere energy conservation to identify tangible benefits derived from comprehensive ESG practices
- Moving beyond anecdotes: how do you demonstrate value & measure outcomes?
- Highlighting case studies where ESG implementation has increased exit valuations and overall returns

Jennifer Flood, Sustainability, Head of North America, **Investindustrial**

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

Responsible Investment Forum: Europe London 2024

12:25

Investor perspectives on the significance of sustainability on investment decisions

- To what extent is ESG impacting investment decisions?
- How are LPs integrating the EDCI within their wider data requests?
- LP views on the effectiveness of ESG strategies in driving long-term value and mitigating risks
- What are the new areas LPs are asking managers about?

Karin Bouwmeester, ESG Lead Private Equity, **PGGM Investments**

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

Jonathan Hirschtritt, Managing Director, Sustainability, **GCM Grosvenor**

Anna Grgic, ESG Integration Manager, **AP6**

13:00

Biodiversity Case Study: how a leading fund manager is approaching this emerging topic

13:20

Lunch

Responsible Investment Forum: Europe London 2024

Track A <u>IMPACT INVESTING</u>	Track B <u>PORTFOLIO COMPANIES/VALUE</u>	Track C <u>REGULATION</u>	Track D <u>NATURE/CLIMATE/PRIVATE DEBT</u>
<p>14:15 Evolution of the impact investing market: opportunities, trends and challenges</p> <ul style="list-style-type: none"> • As ‘impact hushing’ increases, is the impact label a good thing for fundraising at present? • Is the pool of impact-orientated capital growing? • Which themes and sectors within the impact market present the best return potential? <p>Julie Wallace, Head of Impact, LeapFrog Investments</p>	<p>14:15 Portfolio company perspectives on sustainability and ESG performance improvement</p> <ul style="list-style-type: none"> • How are portfolio companies balancing the expectations of their PE sponsors with their other stakeholders? • Investigating the collaborative strategies employed by portfolio companies in partnership with their investors. • What are the key ESG focus areas to improve performance and create real business value? <p>Moderator: Emma Bickerstaffe, Managing Director - London, Holtara, powered by Apex Group</p>	<p>14:15 SFDR Update: how does the regulation work in practice?</p> <ul style="list-style-type: none"> • How to define 'harm' as it relates to the Principal Adverse Impact (PAI) indicators within your investment approach • Examples of E or S characteristics pursued by Article 8 funds: Is there a market standard? • Outlining some of the challenges with taxonomy reporting for LPs • To what extent can tech be used to enhance SFDR compliance <p>Patricia Volhard, Partner, Debevoise & Plimpton Laura Callaghan, Associate Director of ESG Services, Novata</p>	<p>14:15 Revolutionary approaches to Decarbonisation</p> <ul style="list-style-type: none"> • What does best practice look like when decarbonising a portfolio company? • Addressing the financial shortfall in decarbonisation Initiatives • An exploration of emerging and innovative investment strategies

Responsible Investment Forum: Europe London 2024

<p>15:00 Allocator insights on impact: guidance on what LPs should look for and how funds can make themselves investable</p> <ul style="list-style-type: none"> • Diligence strategies for LPs when assessing new investment opportunities • What are the key factors for LPs when evaluating impact funds? • How to assess emerging impact funds without track records • Views on investing in pure impact funds vs. generalists with an impact strategy 	<p>15:00 How sustainability can be used to drive value creation within portfolio companies</p> <ul style="list-style-type: none"> • Implementing effective ESG integration across portfolios • Evaluating ESG risks and opportunities: how is ESG influencing the investment thesis? • To what extent can technology and data providers help portfolio companies with their value creation plans? • Getting buy-in from all key stakeholders on the approach to ESG <p>Viviana Occhionorelli, Head of ESG & Partner, Astorg Elena Mariotti, Managing Director – Head of ESG Stewardship, Cerberus Capital Management</p>	<p>15:00 How regulation can drive value creation: practical tips for ESG professionals</p> <ul style="list-style-type: none"> • Using reporting and disclosure requirements to your advantage • Building a track record and credibility using data • Engaging effectively with investors and portfolio companies <p>Clare Murray, Co-Founding Partner, Blume Equity Sophia Walwyn-James, ESG & Sustainability Director, 3i Group</p>	<p>15:00 How to practically approach biodiversity as an investor</p> <ul style="list-style-type: none"> • Why aren't LPs pushing harder on biodiversity? • To what extent is biodiversity a potential distraction from decarbonisation? • How to assess biodiversity risks and opportunities in the diligence process <p>Marie-Anne Vincent, Head of Finance, AXA Climate Jovana Stopic, ESG Director, IK Partners Mona Huys, Sustainable Investment Specialist, Mercer Alternatives</p>
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Responsible Investment Forum: Europe London 2024

<p>15:45 Impact measurement and management: Best practices in quantifying and reporting impact</p> <ul style="list-style-type: none"> • What are the principles and reporting norms that are emerging for impact funds? • To what extent are funds differentiating between the different 'shades' of impact across their portfolio? • Which impact methodologies and measurements are generalist funds picking up and using? <p>Nora Schulte, Chief Impact & Client Relations Officer, GENUI Marc Williams, Principal, ESG and Impact, Blue Earth Capital</p>	<p>15:45 Driving DE&I in portfolio companies as part of value creation</p> <ul style="list-style-type: none"> • What initiatives can help increase diverse representation at portfolio companies? • Setting realistic targets for driving change on DE&I that fit withing growth expectations • Working with management teams when your own house may not be in order <p>One spot reserved WTW</p>	<p>15:45 Private Markets ESG Regulatory Landscape: A Global Update</p> <ul style="list-style-type: none"> • How can global investors reduce the burden of regulations and frameworks that lack interoperability? • Which regulations and frameworks naturally align with one another? • Comparing regulations in the US & Asia to Europe • Where next for the regulators? 	<p>15:45 Sustainability and climate integration in private credit</p> <ul style="list-style-type: none"> • Can private credit ever do more than private equity, or must they always follow? • How investors and managers have collaborated to enhance transparency in private credit • What tools can private credit investors use to understand where their portfolio stands in terms of decarbonisation status and climate risk? • What's next? <p>Isabelle Mitchell, ESG Lead, Permira Credit</p>
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16:30 Coffee & networking

16:50 Working Group Series A

This session closed door session (GP and LP only, no service providers) allows for an interactive roundtable discussion with designated facilitators.

Responsible Investment Forum: Europe London 2024

<p><u>Working Group A</u> Practical tips for using AI in day-to-day work</p>	<p><u>Working Group B</u> Building a coherent plan for biodiversity</p>	<p><u>Working Group C</u> Working with portfolio companies Holtara</p>
<p><u>Working Group E</u> Greenwashing: Trends in litigation and best practices to protect your portfolio Facilitator: Miriam Wrobel, Global Head of ESG & Sustainability, FTI Consulting</p>	<p><u>Working Group F</u> Using ESG in fundraising: LPs and GPs discuss what works</p>	<p><u>Working Group G</u> Shifting engagement focus from regulation compliance to value-add opportunity Facilitator: Andrew Mather, Director, Ramboll</p>

17:45

Cocktail reception

Responsible Investment Forum: Europe London 2024

Day Two: 21 November

08:00-08:50

GPs Breakfast Roundtable hosted by Invest Europe

LP Breakfast Roundtable hosted by ILPA

8:55

Opening Remarks

9:00

Oxford style debate: This house believes that setting science-based targets for an entire portfolio is not practical

Two sides will take the stage with structured arguments and the opportunity for rebuttals and audience exchange. The audience will vote before and after the debate to see if the participants manage to move the audience.

9:40

Sustainable Markets Initiative Update

- Recent Achievements and Milestones
- Key Focus Areas and Initiatives

10:15

Navigating complex supply chains in private equity

- What questions are investors asking managers on supply chains?

Responsible Investment Forum: Europe London 2024

- How is increased scrutiny impacting how managers approach this issue?
- Strategies for enhancing transparency and accountability across the supply chain
- The role of technology and data analytics in assessing and managing supply chain risks

Ana Alvarez Grullón, Managing Director - Head of ESG & Sustainability, **Keensight Capital**

Cornelia Gomez, Global Head of ESG, **General Atlantic**

10:50

Coffee & networking

11:20

Assessing AI's impacts on sustainability and the sustainability role

- Examples of how AI is being used during ESG assessments during due diligence
- Leveraging AI across the whole investment cycle
- Considering some of the possible negative uses of AI for example how it could be used to help with greenwashing
- What are the most material impacts from AI on sustainability? What will generative AI help most with in future years?

Moderator: **Chandini Jain**, Founder & CEO, **Auquan**

12:00

AI Case Study: how a leading fund manager is integrating Responsible AI

Responsible Investment Forum: Europe London 2024

12:30

ESG Value Creation Excellence Stories

4 short presentations on how ESG initiatives or technologies can be used to drive returns within PE investments within different areas of sustainability. The audience will have the chance to quiz the presenters, and vote on the most impressive story. During the lunchbreak presenters will be available for further questions over informal roundtables

13:15

Lunch

14:00

Regulatory workshop: sustainability regulation for private markets

15:00

ESG Value Creation workshop: sharing best practices for improving ESG to drive value at portfolio companies