

Responsible Investment Forum: Europe London 2024

Day One: 20 Nov 2024

7:30

Invitation only breakfast hosted by Key ESG

Supporting your portfolio on CSRD compliance

Many portfolio companies are facing a new ESG reporting challenge with the CSRD. These companies often lean on their investors for guidance and support. During this CSRD-focused breakfast session hosted by KEY ESG, you will learn about the different challenges arising from CSRD requirements and how they can be addressed to build repeatable, scalable and auditable reporting processes across your portfolio of investments

Facilitator: **Heleen van Poecke**, Co-founder and CEO, **KEY ESG**

8:45

Chairpersons opening remarks

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

9:00

Keynote Fireside Chat: the future of sustainability in private markets

Tom Reichert, Global CEO, **ERM**

In conversation

Kurt Björklund, Executive Chairman, **Permira**

Co-facilitators towards end of session

Allegra Day, ESG Director, **Cinven**

Euan Long, Climate Specialist, **Permira**

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9:45

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?
- Balancing sustainability performance and value creation with increasing sustainability regulation

Moderator: **Alan Kao**, Principal and Global Director, ESG Services, **Ramboll**

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

Daniel D'Ambrosio, Partner, **Kirkland & Ellis**

Denise Odaro, Head of ESG and Sustainability, **PAI Partners**

Phil Davis, Director of ESG, **Helios Investment Partners**

10:20

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 and the path to decarbonization
- Assessing measurable outcomes within individual portfolio companies after three years of implementation: what progress have GPs observed?

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Moderator: **Greg Fischer**, Partner & Director, **BCG**

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

Katharina Neureiter, Co-Head Global Sustainability, **The Carlyle Group**

Samantha Hill, Managing Director - Sustainable Investing, **CPP Investments**

Nicole Peerless, Head of Global Business Engagement, **Pulsora**

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

11:00

Coffee & networking

11:30

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

Moderator: **Marc Lino**, Senior Partner, Global ESG Leader for Private Equity, **Bain & Company**

Mark Fischel, Head of Product, **Novata**

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

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

Sofia Bartholdy, Responsible Investment Integration Director, **Church Commissioners for England**

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12:10

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

Moderator: **Laurence Denvir**, Director – Private Equity, **WTW**

Aditya Vikram, Head of Private Equity, **UNPRI**

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

Jennifer McCraight, Vice President, **Permira**

Zara de Belder, Associate Director, ESG Transactions & Sustainable Finance, **Anthesis**

12:45

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?

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Moderator: **Jennifer Wilson**, CEO & Founder, **Re:Co**
Karin Bouwmeester, ESG Lead Private Equity, **PGGM Investments**
Maaïke van der Schoot, Head of Responsible Investment, **AlpInvest Partners**
Anna Grgic, ESG Integration Manager, **AP6**
Sabrina Sargent, Senior Director - Private Equity, **PSP Investments**

13:20
Lunch

Track A <u>PORTFOLIO COMPANIES/VALUE</u>	Track B <u>IMPACT INVESTING</u>	Track C <u>REGULATION</u>	Track D <u>CLIMATE/NATURE/PRIVATE DEBT</u>
<p><u>14:15</u> Opening Remarks Maarten Biermans, ESG & Investor Relations, Prow Capital</p> <p><u>14:20</u> Portfolio company perspectives on sustainability and ESG performance improvement</p>	<p><u>14:15</u> Opening Remarks Christopher Springham, Formerly VP - Communications and Sustainability, LM Wind Power</p> <p><u>14:20</u> Evolution of the impact investing market: opportunities, trends and challenges</p>	<p><u>14:15</u> Opening Remarks Erika Blanckaert, Senior Public Affairs Manager - Head of Sustainability, Invest Europe</p> <p><u>14:20</u> 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 	<p><u>14:15</u> Opening Remarks Carmela Mondino Borromeo, Independent, ESG Specialist</p> <p><u>14:20</u> Revolutionary approaches to Decarbonisation</p> <ul style="list-style-type: none"> • What does best practice look like when decarbonising a portfolio company?

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<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: Alessandro Casoli, UK Principal, Holtara, powered by Apex Group Oscar Sandell, Chief People & Sustainability Officer, Saferoad Isabelle Demoment, CSR, Product Stewardship and Regulatory Director, Kersia Angela Williams, Chief People Officer Corsearch</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>Moderator: Greg Fischer, Partner & Director, BCG Julie Wallace, Head of Impact, LeapFrog Investments Maarten Hage, Vice President (Climate), Helios Investment Partners Edward Donkor, Partner Global Impact team, Apax Dr. Borja Fernandez Tamayo, Vice President, Unigestion</p>	<p>(PAI) indicators within your investment approach</p> <ul style="list-style-type: none"> • 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>Moderator: Marta Jankovic, Head of Sustainability, Stafford Capital Partners Patricia Volhard, Partner, Debevoise & Plimpton Laura Callaghan, Associate Director of ESG Services, Novata Robert Sroka, Partner and Head of the Value Enhancement Team, Abris Capital Partners</p>	<ul style="list-style-type: none"> • Addressing the financial shortfall in decarbonisation Initiatives • An exploration of emerging and innovative investment strategies <p>Moderator: Deike Diers, Partner, Sustainability for Private Equity and Financial Investors, Bain & Company Frederik Dagø, Decarbonization Director, FSN Capital Elsa Palanza, Global Head of Sustainability and ESG, ICG Mahesh Roy, Investor Strategies Programme Director, IIGCC</p>
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<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>Moderator: Manuela Fumarola, Director, EMEA Lead - ESG & Impact Value Creation, ERM Viviana Occhionorelli, Head of ESG & Partner, Astorg Elena Mariotti, Managing Director,</p>	<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>Moderator: Toby Mitchenall, Senior Editor, ESG and Sustainability, PEI Sarah Miller, Senior Vice President - Manager Research, Redington Anita Bhatia, Board Member, Joseph Rowntree Foundation Stéphane Villemain, Vice President,</p>	<p>15:00 How regulation can drive value creation: practical tips for ESG professionals</p> <ul style="list-style-type: none"> • Turning the CSRD and other reporting and disclosure requirements into an advantage • Building a track record and credibility using data • Engaging effectively with investors and portfolio companies • Empowering your portfolio to report efficiently and focus on value creation <p>Moderator: Dr. Silva Deželan, Head of Impact & ESG, Forbion Saleh ElHattab, CEO, Gravity Sophia Walwyn-James, ESG & Sustainability Director, 3i Group Michael Viehs, Managing Director, Global Head of Sustainable Investing, Partners Capital</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 Peter Bachmann, Managing Director, Sustainable Infrastructure, Gresham House Mona Huys, Sustainable Investment Specialist, Mercer Alternatives</p>
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<p>Head of ESG Stewardship, Cerberus Capital Management Holland Davis, Principal, HarbourVest Partners</p>	<p>Sustainability, CDPQ Danyal Sattar OBE, CEO, Big Issue Invest</p>	<p>Alison Prout, ESG Transformation Specialist, Agilitas Private Equity</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>Moderator: Kate Hollis, Global Head of Credit, WTW Investments Olga Wilhelm, Impact & Client Relations Manager, GENUI</p>	<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>Moderator: Misa Andriamihaja, Founder, Green Ventures Capital</p>	<p>15:45 Private Markets ESG Regulatory Landscape: A Global Update (Chatham House)</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>Moderator: Rhys Davies, Partner – ESG & Impact, Kirkland & Ellis Chris Shaw, Technical Director, ESG Advisory and Mandatory Reporting, Anthesis</p>	<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>Moderator: Rajen Gokani, Executive Director, Sustainability and Impact</p>

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<p>Nick Chee, Associate Director, ESG & Stewardship, AustralianSuper</p>	<p>Nora Schulte, Chief Impact & Client Relations Officer, GENUI Marc Williams, Principal, ESG and Impact, Blue Earth Capital Abrielle Rosenthal, Managing Director and Chief Sustainability Officer, TowerBrook Capital Partners</p>	<p>Christina Bortz, Deputy General Counsel, ESG, TPG Angelo Gordon</p>	<p>Investments Lead, GCM Grosvenor Isabelle Mitchell, ESG Lead, Permira Credit Vlad Mitroi, Head of ESG, Chenavari Investment Managers Alicia Forry, Head of ESG, Alternative Investments, Direct Lending, Investec Salma Moolji, European ESG Lead, Ares Management</p>
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16:30 Coffee & networking

16:50 Working Group Series A

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

<p><u>Working Group A</u> Practical tips for using AI in day-to-day work Facilitator: Billy Cotter, Head of ESG, Dasseti</p>	<p><u>Working Group B</u> Building a coherent plan for biodiversity Grant Rudgley, Technical Director, The Biodiversity Consultancy Zoe Haseman, Infrastructure Head of Sustainability, EQT Samantha Lacey, Strategic Director, Nature Finance, The Biodiversity Consultancy</p>	<p><u>Working Group C</u> ESG-linked debt: how to help portfolio companies access lower interest rates Daan Schipper, Senior Director, Northern Europe, Holtara, powered by Apex Group Alessandro Casoli, Head of Advisory UK & Deputy Head of Holtara UK, Holtara, powered by Apex Group</p>
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<u>Working Group D</u> Greenwashing: Trends in litigation and best practices to protect your portfolio	<u>Working Group E</u> Driving Portfolio-wide Decarbonization: Overcoming the Data Challenge	<u>Working Group F</u> Shifting engagement focus from regulation compliance to value-add opportunity Facilitators Andrew Mather , Director, Ramboll Dina Kusnezowa , Manager, Strategic Sustainability Consulting, Ramboll
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16:50 – Running concurrently

Building effective networks to help grow your business in private markets sustainably

Join this exclusive networking and learning session, where advisors will gain practical tips to enhance their success in working with private equity. Engage with industry peers to discuss what works—and what doesn't—in this dynamic field. A must-attend session for all service providers at the event.

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

17:45

Cocktail reception

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7:30

Registration open

8:00-8:50

GPs Breakfast Roundtable hosted by EY: Infusing ESG into operations and investing

To maximize financial returns, ESG must evolve into a fully integrated practice that permeates all operations from LP fundraising to exit planning.

Chase Jordan, Global Private Equity ESG Leader, **EY**

LP Breakfast Roundtable hosted by ILPA

Join your fellow Limited Partners for a networking breakfast and peer-to-peer conversation around the current challenges and opportunities LPs are facing pertaining to ESG and sustainability in 2024. Discussions will take place under Chatham House rules

Matt Schey, Managing Director, External Affairs & Sustainable Investing, **ILPA**

8:55

Opening Remarks

9:00

The big debate: balancing ambition and practicality when setting science-based targets

- Addressing concerns around the operational challenges of setting science-based targets
- Understanding the practical challenges around setting targets at a portfolio level
- Meeting LP and regulators expectations on targets and transition plans

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- Case studies: successes and lessons learned

Moderator: **John Pratson**, Strategic Customer Success, **Watershed**

Lucy Ronan, Senior Sustainability Manager, **Octopus Investments**

Madeleine Evans, Director, **Generation Investment Management**

Eimear Palmer, Partner, Global Head of Sustainability, **Pantheon Ventures**

Samantha Lacey, Strategic Director, Nature Finance, **The Biodiversity Consultancy**

9:40

Sustainability during exits in a challenging environment

- To what extent are sustainability teams involved in exit preparation?
- How driving impact broadens the potential pool of buyers and can enhance valuations
- ESG considerations when exiting via IPO vs. a sale to another PE buyer
- Leveraging ESG to drive multiples at exit

Moderator: **Jo Daley**, Director, Head of Impact, **Clearwater**

Graeme Arduis, Head of ESG, **Triton Partners**

James Palman, Sustainable Investment Manager, **Gresham House**

Shami Nissan, Partner, Head of Sustainability, **Actis**

Tricia Winton, Partner and Global Head of ESG, **Bain Capital**

10:15

Navigating complex supply chains in private equity

- What questions are investors asking managers on supply chains?

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- 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

Moderator: **Eric Bloom**, COO & Head of Client Solutions, **Re:Co**

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

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

Angela Wiebeck, Chief Sustainability Officer, **Aquila Capital**

Fabio Ranghino, Head of Sustainability & Strategy and Partner, **Ambienta**

10:50

Coffee & networking

11:20 (Chatham House Session)

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**

Budha Bhattacharya, Head of Systematic Research, **Lombard Odier Investment Managers**

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Simon Fahrenholz, Head of Sustainability, **EY Germany**

Hannah-Polly Williams, Director, Head of Sustainability, Europe, **CD&R**

12:00

ESG Controversies: A Comparative Study of Public vs Private Sectors

A unique presentation outlining the differences between public and private companies. Public companies, due to their significant market presence and mandatory financial disclosures, often face intense media scrutiny, amplifying any ESG controversies in public and online discussions. In contrast, private companies operate with greater discretion and less external pressure. This session will explore how these dynamics affect company operations, public perception, and management strategies.

Sylvain Forté, CEO & Co-founder, **SESAMm**

12:30

ESG Value Creation Excellence Stories

3 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

Facilitator: Claudia Hobl, Partner & Associate Director, Climate & Sustainability, **BCG**

Angus MacDonald, Chief Hospitality Officer, **Phoenix Capital Partners**

Jill Brosig, Senior Managing Director, Chief Impact Officer, **Harrison Street**

James Magor, Director, Sustainability, **Actis**

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Lunch

14:00

Regulatory workshop: sustainability regulation for private markets

Led by Travers Smith, their ESG & Impact experts will lead an interactive workshop where they will discuss the latest developments in regulation and practical approaches to them

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

15:00

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