

Responsible Investment Forum: Europe

20 - 21 November 2024, 155 Bishopsgate London

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CONFIRMED SPEAKERS

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

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

Karin Bouwmeester, ESG Lead Private Equity, PGGM Investments

Marc Williams, Principal, ESG and Impact, Blue Earth Capital

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

Adinah Shackelton, Head of ESG, Permira

Nick Chee, Associate Director, ESG & Stewardship, AustralianSuper

Jennifer Wilson, CEO & Founder, Re:Co

Salma Moolji, European ESG Lead, Ares Management

Allegra Day, ESG Director, Cinven

Chloe Sanders, Head of ESG, CVC Capital Partners

Elsa Palanza, Global Head of Sustainability and ESG, ICG

Denise Odaro, Head of ESG and Sustainability, PAI Partners

Isabelle Demoment, CSR, Product Stewardship and Regulatory Director, Kersia

Frederik Dagø, Decarbonization Director, FSN Capital

Edward Donkor, Partner Global Impact team, Apax

Michael Viehs, Managing Director, Global Head of Sustainable Investing, Partners Capital

Peter Dunbar, Principal – Responsible Investment, StepStone Group

Maaike van der Schoot, Head of Responsible Investment, AlpInvest Partners

Jonathan Hirschtritt, Managing Director, Sustainability, GCM Grosvenor

Robert Sroka, Partner and Head of the Value Enhancement Team, Abris Capital Partners

Ben Morley, Partner and Associate Director, BCG

Kate Hollis, Global Head of Credit, WTW Investments

Olga Wilhelm, Impact & ESG Manager, GENUI

Will Relle, Director, ESG, HarbourVest Partners

Abrielle Rosenthal, Managing Director and Chief Sustainability Officer, TowerBrook Capital Partners

Oscar Sandell, Chief Human Resources Officer, Saferoad

Alicia Forry, Head of ESG, Alternative Investments, Direct Lending, Investec

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



Anita Bhatia, Board Member, Joseph Rowntree Foundation
Sarah Miller, Senior Vice President - Manager Research, Redington
Simon Witney, Senior Consultant, Travers Smith
Phil Davis, Director of ESG, Helios Investment Partners
Nicole Peerless, Head of Global Business Engagement, Pulsora
Jayde Alexander, Account Director for Financial Services, Watershed
Deike Diers, Partner, Sustainability for Private Equity and Financial Investors, Bain & Company
Stéphane Villemain, Vice President, Sustainability, CDPQ
Alison Prout, ESG Specialist Transformation Consultant, Agilitas Private Equity

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Manuela Fumarola, Director, EMEA Lead - ESG & Impact Value Creation, ERM
Gabriel Caillaux, Co-President, Managing Director, Head of Climate, General Atlantic

Chloe Sanders, Head of ESG, CVC Capital Partners Shami Nissan, Partner, Sustainability, Actis Danyal Sattar OBE, CEO, Big Issue Invest

Peter Bachmann, Managing Director, Sustainable Infrastructure, Gresham House
Rhys Davies, Partner – ESG & Impact, Kirkland & Ellis
Eimear Palmer, Partner, Global Head of Sustainability, Pantheon Ventures
Dr. Silva Deželan, Head of Impact & ESG, Forbion

Christina Bortz, Deputy General Counsel, ESG, TPG Angelo Gordon Angela Wiebeck, Chief Sustainability Officer, Aquila Capital

Katharina Neureiter, Head of ESG & Impact, EMEA & APAC - Global Sustainability, The Carlyle Group Jennifer Flood, Sustainability, Head of North America, Investindustrial

Mark Fischel, Head of Product, Novata

Laurence Denvir, Director – Private Equity, WTW

Daniel D'Ambrosio, Partner, Kirkland & Ellis

Serge Younes, Partner, Global Head of Sustainability, Investindustrial
Dr. Borja Fernandez Tamayo, Vice President, Unigestion
Salma Moolji, European ESG Lead, Ares Management
Natasha Buckley, Principal, ESG, HarbourVest Partners
Madeleine Evans, Director, Generation Investment Management
Angela Williams, Chief People Officer Corsearch



Cornelia Gomez, Global Head of ESG, General Atlantic

Angus MacDonald, Chief Hospitality Officer, Phoenix Capital Partners

Patricia Volhard, Partner, Debevoise & Plimpton

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

Misa Andriamihaja, Private Equity Lead, IIGCC

Lucy Ronan, Senior Sustainability Manager, Octopus Investments

Aditya Vikram, Head of Private Equity, UNPRI

Chandini Jain, Founder & CEO, Auguan

Anna Grgic, ESG Integration Manager, AP6

Laura Callaghan, Associate Director of ESG Services, Novata

Greg Fischer, Partner & Director, Boston Consulting Group

Matt Schey, Managing Director of External Affairs and Sustainable Investing, ILPA

Vlad Mitroi, Head of ESG, Chenavari Investment Managers

Alan Kao, Principal and Global Director, ESG Services, Ramboll

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

Alessandro Casoli, UK Principal, Holtara, powered by Apex Group

Andrew Mather, Director, Ramboll

Julie Wallace, Head of Impact, LeapFrog Investments

Chris Shaw, Technical Director, ESG Advisory and Mandatory Reporting, Anthesis

Sophia Walwyn-James, ESG & Sustainability Director, 3i Group

Billy Cotter, Head of ESG, Dasseti

Jovana Stopic, ESG Director, IK Partners

Mona Huys, Sustainable Investment Specialist, Mercer Alternatives

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

Sylvain Forté, CEO & Co-founder, SESAMm

Viviana Occhionorelli, Head of ESG & Partner, Astorg

Isabelle Mitchell, ESG Lead, Permira Credit

Elena Mariotti, Managing Director, Head of ESG Stewardship, Cerberus Capital Management
Hannah Morrill, Associate Partner, Energy transition & Sustainability investing, Bain & Company
Nora Schulte, Chief Impact & Client Relations Officer, GENUI

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



Day One: 20 Nov 2024

7:30

Breakfast in a private room for GPs and LPs Hosted by Key ESG

8:45

Chairpersons opening remarks

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

9:00

Fireside chat: how General Atlantic is addressing global climate change through technology, innovation and entrepreneurship Gabriel Caillaux, Co-President, Managing Director, Head of Climate, General Atlantic

9:25

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 Al going to impact the role of sustainability heads? And how is it already being used?

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

Allegra Day, ESG Director, Cinven



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 and the path to decarbonization
- 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

Samantha Hill, Managing Director - Sustainable Investing, CPP Investments

Nicole Peerless, Head of Global Business Engagement, Pulsora

Chloe Sanders, Head of ESG, CVC Capital Partners

10:40

Coffee & networking

11:10

iCl 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



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

Moderator: Laurence Denvir, Director – Private Equity, WTW

Aditya Vikram, Head of Private Equity, UNPRI

Jennifer Flood, Sustainability, Head of North America, Investindustrial

Adinah Shackelton, Head of ESG, Permira

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

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?

Moderator: Jennifer Wilson, CEO & Founder, Re:Co
Karin Bouwmeester, ESG Lead Private Equity, PGGM Investments
Maaike van der Schoot, Head of Responsible Investment, AlpInvest Partners
Jonathan Hirschtritt, Managing Director, Sustainability, GCM Grosvenor
Anna Grgic, ESG Integration Manager, AP6



13:00

Case Study: how a leading asset manager is creating commercial value from decarbonisation

Facilitator: ERM

13:20 Lunch

Track A **IMPACT INVESTING**

14:15

Opening Remarks

Christopher Springham, Formerly VP -Communications and Sustainability, LM

Wind Power

14:20

Evolution of the impact investing market: opportunities, trends and challenges

- 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?

Julie Wallace, Head of Impact, LeapFrog **Investments** Phil Davis, Director of ESG, Helios

Investment Partners

Track B **PORTFOLIO COMPANIES/VALUE**

14:15

Opening Remarks

Maarten Biermans, ESG & Investor Relations, **Prow Capital**

14:20

Portfolio company perspectives on sustainability and ESG performance improvement

- 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?

Moderator: **Alessandro Casoli**, UK Principal, Holtara, powered by Apex

Track C **REGULATION**

14:15

Opening Remarks

14:20

SFDR Update: how does the regulation work in practice?

- 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

Patricia Volhard, Partner, Debevoise & Plimpton

Laura Callaghan, Associate Director of ESG Elsa Palanza, Global Head of Sustainability Services, Novata

Robert Sroka, Partner and Head of the

Track D CLIMATE/NATURE/PRIVATE DEBT

14:15

Opening Remarks

14:20

Revolutionary approaches to Decarbonisation

- 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

Moderator: Deike Diers, Partner, Sustainability for Private Equity and Financial Investors, Bain & Company Frederik Dagø, Decarbonization Director, **FSN Capital**

and ESG, ICG



Edward Donkor, Partner Global Impact team, Apax Dr. Borja Fernandez Tamayo, Vice President, Unigestion	Group Oscar Sandell, Chief Human Resources Officer, Saferoad Isabelle Demoment, CSR, Product Stewardship and Regulatory Director, Kersia Angela Williams, Chief People Officer Corsearch	Value Enhancement Team, Abris Capital Partners	Misa Andriamihaja, Private Equity Lead, IIGCC
 15:00 Allocator insights on impact: guidance on what LPs should look for and how funds can make themselves investable 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 Sarah Miller, Senior Vice President - Manager Research, Redington Anita Bhatia, Board Member, Joseph Rowntree Foundation Stéphane Villemain, Vice President, Sustainability, CDPQ 	 How sustainability can be used to drive value creation within portfolio companies 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 Moderator: Manuela Fumarola, Director, EMEA Lead - ESG & Impact Value Creation, ERM Viviana Occhionorelli, Head of ESG & Partner, Astorg Elena Mariotti, Managing Director, Head of ESG Stewardship, Cerberus Capital 	15:00 How regulation can drive value creation: practical tips for ESG professionals • Using reporting and disclosure requirements to your advantage • Building a track record and credibility using data • Engaging effectively with investors and portfolio companies Sophia Walwyn-James, ESG & Sustainability Director, 3i Group Dr. Silva Deželan, Head of Impact & ESG, Forbion Michael Viehs, Managing Director, Global Head of Sustainable Investing, Partners Capital Alison Prout, ESG Specialist Transformation Consultant, Agilitas Private Equity	 How to practically approach biodiversity as an investor 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 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

Danyal Sattar OBE, CEO, Big Issue Invest	Management Will Relle, Director, ESG, HarbourVest Partners		
15:45	15:45	15:45	<u>15:45</u>
Impact measurement and management: Best practices in quantifying and reporting impact	Driving DE&I in portfolio companies as part of value creation	Private Markets ESG Regulatory Landscape: A Global Update (Chatham House)	Sustainability and climate integration in private credit Can private credit ever do more than
 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? 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 	 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 Moderator: Kate Hollis, Global Head of Credit, WTW Investments Olga Wilhelm, Impact & ESG Manager, GENUI Nick Chee, Associate Director, ESG & Stewardship, AustralianSuper Peter Dunbar, Principal – Responsible Investment, StepStone Group 	 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? Moderator: Rhys Davies, Partner – ESG & Impact, Kirkland & Ellis Chris Shaw, Technical Director, ESG Advisory and Mandatory Reporting, Anthesis Christina Bortz, Deputy General Counsel, ESG, TPG Angelo Gordon 	 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? Isabelle Mitchell, ESG Lead, Permira Credit Vlad Mitroi, Head of ESG, Chenavari



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.

Working Group A Practical tips for using AI in day-to-day work Facilitator: Billy Cotter, Head of ESG, Dasseti	Working Group B Building a coherent plan for biodiversity	Working Group C Working with portfolio companies Holtara
Working Group E Greenwashing: Trends in litigation and best practices to protect your portfolio	Working Group F Driving Portfolio-wide Decarbonization: Overcoming the Data Challenge Jayde Alexander, Account Director for Financial Services, Watershed	Working Group G Shifting engagement focus from regulation compliance to value-add opportunity Facilitator: Andrew Mather, Director, Ramboll

17:45 Cocktail reception



Day Two: 21 Nov 2024

8:00-8:50

GPs Breakfast Roundtable

LP Breakfast Roundtable hosted by ILPA

Matt Schey, Managing Director, External Affairs and 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
- Case studies: successes and lessons learned

Lucy Ronan, Senior Sustainability Manager, Octopus Investments

Madeleine Evans, Director, Generation Investment Management

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

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?



- 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 ESG, General Atlantic

Angela Wiebeck, Chief Sustainability Officer, Aquila Capital

10:50

Coffee & networking

11:20

Assessing Al'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

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



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

Angus MacDonald, Chief Hospitality Officer, Phoenix Capital Partners

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

13:15

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