

CREATING VALUE THROUGH SUSTAINABILITY

Live Online Classroom, 28-29 May 2026



Sustainability has moved beyond a compliance exercise - it is a core driver of fund performance.

In this course, you will discover how leading GPs are turning sustainability into a competitive advantage that creates lasting value for their investors. Mid-market and VC GPs will present real-world case studies showing how they integrate sustainability throughout the investment cycle - from reducing costs and increasing revenue to enhancing resilience and managing risk. LPs will share their evolving expectations and what they look for in credible sustainability strategies. Legal experts will provide practical guidance on SFDR reporting and insights into upcoming regulatory developments.

What is it?

- The following topics will be covered:
- Value creation through sustainability - introduction
- Value creation in legal terms - fiduciary duty and legal obligations
- From compliance to value creation - integration of sustainability in the investment cycle - mid-market buyout & VC perspectives
 - Identifying and assessing material ESG factors
 - Leveraging sustainability to identify investment and transformation opportunities
 - On-boarding sustainability post-investment
 - Monitoring sustainability throughout the holding period
 - Reporting performance - Invest Europe ESG reporting template
 - Evidencing ESG value creation at exit
 - Exploring the role of AI
- LP expectations from fundraising to reporting
- ESG reporting under SFDR - Examples of Article 8, 8+ and 9 reports
- Looking ahead - emerging sustainability themes and upcoming regulation

Who should attend?

The training is designed for PE & VC investment professionals and sustainability teams who would like to gain practical and actionable insights from industry experts and peers on how sustainability can be a value lever across the investment cycle.

PROGRAMME:

Day One

9:00 - 09:30 CET

Introduction

- Current sustainability landscape
 - Creating value through sustainability - frameworks
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09:30 - 10:00 CET

Value creation in legal terms - fiduciary duty and legal obligations

- What does it mean to be a fiduciary manager?
 - What obligations exist and how are they documented in different frameworks?
 - What does this mean for the integration of ESG and sustainable investing strategies?
 - How can diverging expectations in different regions of the world be managed?
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10:00 - 10:10 CET

COFFEE BREAK

10:10 - 11:00 CET

From compliance to value creation - integrating sustainability in the investment cycle

- Materiality assessment of ESG & impact factors
 - Leveraging ESG & impact factors to identify transformation opportunities
 - Defining ESG & impact ambition & setting KPIs and targets
 - Post-investment sustainability on-boarding process
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11:00 - 11:10 CET

COFFEE BREAK

11:10 - 12:00 CET

From compliance to value creation - integrating sustainability in the investment cycle (continued)

- Monitoring of ESG & impact factors throughout the holding period
 - How do we evidence ESG value creation at exit?
 - Reporting performance - Invest Europe ESG reporting template
 - The use of AI
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12:00 - 12:30 CET

INFORMAL Q&A SESSION

Day Two

09:00 - 9:40 CET

Value creation case study - interactive exercise

9:40 - 10:10 CET

LP expectations - a fireside chat

- How have value creation trends impacted your processes?
 - Why does sustainability data collection & reporting matter?
 - What will an LP focus on in sustainability due diligence?
 - How and what do LPs collect from their GP portfolios from different asset classes?
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10:10 - 10:20 CET

COFFEE BREAK

10:20 - 11:20 CET

ESG reporting - regulations, voluntary standards and LP/GP positions

- What reporting is required under current and future regulations?
 - Which role can voluntary standards and frameworks play?
 - What are the LP expectations and minimum standards when it comes to ESG reporting?
 - How can meaningful reporting become a USP for GPs?
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11:20 - 11:30 CET

COFFEE BREAK

11:30 - 12:00 CET

What is next in value creation

12:00 - 12:30 CET

INFORMAL Q&A SESSION

SPEAKERS



Amara Goeree is Sustainability Director Private Equity at **Schroders Capital Management**. Prior to this, Amara was Owner and ESG Strategy, Integration & Rating Consultant at Blue Phoenix. Previously, Amara was Associate Partner at Contrast Capital, an independent boutique consultancy firm focused exclusively on sustainable finance. Amara is a member of Invest Europe's ESG Committee. She holds a Msc. In Global Business and Stakeholder Management from the Rotterdam School of Management, Erasmus University.



Graeme Ardus is Head of Sustainability at Triton Partners. He was the Global Director of Occupational Health, Safety and Environment (OHSE) and Sustainability at Amcor Tobacco Packaging and was the Director of Environment, Health and Safety (EHS) and Sustainability at Alcan Packaging. He also worked at Environmental Resources Management and Shell International. Graeme holds an MSc in Environmental Management from the European Association of Environmental Management Education.



Heike Schmitz is Partner at **Herbert Smith Freehills Kramer**. She has worked in various roles in the insurance and investment industry for more than 16 years. Heike advises on all aspects of insurance investments, fund structuring and formation as well as regulatory matters. A particular focus lies on sustainable and impact investing in liquid and illiquid asset classes and the implementation of the EU Sustainable Finance framework for funds, asset managers, insurers and pension funds across Europe.



Leslie Kapin is Partner and Director of Impact at **Astanor Ventures**. Leslie joined Astanor in 2019 and is responsible for monitoring sustainability and impact. She brings more than 13 years' experience in global asset management within both the private and public sector. After 9 years with global asset manager Russell Investments as a research analyst and portfolio manager for the Asian equity markets in London, Paris and Sydney, Leslie joined the Bank for International Settlements (BIS) in Basel where she was responsible for the selection of all the investments for the BIS's Pension Fund for three years. Leslie is a member of Invest Europe's ESG Committee.



Maaïke van der Schoot is Carlyle AlInvest's Head of Responsible Investment. She is based in Amsterdam. In her role, she leads the development and implementation of Carlyle AlInvest's Responsible Investment strategy. Maaïke joined Carlyle AlInvest in 2002. Prior to her current role, she was an investment manager in the Co-Investment team. Maaïke previously worked at Morgan Stanley in London as an investment banking analyst. Maaïke received an MSc in Financial Economics from Erasmus University Rotterdam.



Manuela Fumarola is an Associate Partner at ERM, who specializes in driving value creation through ESG strategies within private equity firms and their portfolio companies. At abrdn Private Equity, she spearheaded the implementation of climate change strategies and led efforts under SFDR, launching an Article 8+ fund. Prior, at M&G Investments, she invested in primary and co-investment deals across Europe and Asia, shaping the firm's ESG strategy and launching its first Impact Fund of Funds. Her work in private equity influenced M&G's contributions to the ILPA ESG Assessment Framework.

RELEVANT ACTIVITIES AND PUBLICATIONS

The [Invest Europe Handbook of Professional Standards](#) provides accessible, practical and clear guidance on the principles of governance, transparency and accountability that all Invest Europe members must abide by. Updated every year, it focuses on the relationship between private equity managers and their investors and between managers and the companies they back.

Other relevant publications include the [Climate Change Guide](#), the [GP ESG Due Diligence Guide](#), the [ESG Reporting Guidelines](#) and our dedicated [Guide on the EU SFDR and Taxonomy](#).

REGISTRATION

Invest Europe member price: €630

Non-member price: €900

For more information and/or to register for the course, just contact Elena Vasileva at training@investeurope.eu.