

2022

# LEVEL EEI

ANNUAL HIGH LEVEL EXPERT FORUM FOR  
SUSTAINABLE FINANCE (HLEF) – CO-  
CREATING THE FUTURE OF SUSTAINABLE  
FINANCE.

2022 – PROGRAMME VERSION 14/11/2022

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# Annual High Level Expert Forum for Sustainable Finance (HLEF) – Co-creating the future of sustainable finance.

## 2. Information for the participants

### 2.1. Dates & Place

Date: 13<sup>th</sup> and 14<sup>th</sup> of December 2022

Place: BIP Meeting Center, Place Royale 11, B-1000 Brussels, Belgium & Online (Streaming of the Plenary Sessions)

### 2.2. Registration

Register to the event by following this link: <https://forms.gle/gEmQacUHZZxb4NeDA>

Participation to the Conference is free of charge.



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*Accélérateur de transformation durable*



## 3. Agenda

### 3.1. Day 1 – Tuesday 13th December

Time	Title	Moderator or Speaker
08h30 – 09h00	Registrations	
09h00 – 09h15	Opening Speech	By <b>Guillaume Prache</b> , BETTER FINANCE
09h15 – 09h30	<b>Keynote</b> Speech	TBC
09h30 – 10h30	<b>Panel 1</b> – How to impact energy efficiency and sustainable energy investments with sustainable financial products?	Moderated by <b>Nicola Koch</b> , 2Dii
10h30 – 11h00	Coffee Break	
11h00 – 13h00	Participant's choice:	
	<b>Workshop 1</b> – Generating individual and collective impact in public markets	Moderated by <b>Nicola Koch</b> , 2Dii
	<b>Workshop 2</b> – Generating more impact in private markets	Moderated by <b>Mickaël Mangot</b> , 2Dii
13h00 – 14h00	Lunch	
14h00 – 15h00	<b>Lecture &amp; Q&amp;A</b> – Measuring and proving environmental impact, an impossible task - really?	By <b>Mickaël Mangot</b> , 2Dii
15h00 – 15h30	Coffee Break	
15h30 – 17h30	Participant's choice:	
	<b>Workshop 3</b> – Overcoming barriers of environmental impact evaluation in finance	Moderated by <b>Nicola Koch</b> , 2Dii
	<b>Workshop 4</b> – Responsible environmental impact claims	Moderated by <b>Samia Baadj &amp; David Cooke</b> , 2Dii
17h30 – 18h30	Networking Cocktail (TBC)	
From 19h00	&/or Networking Diner (TBC – fee payable by the participants)	



### 3.2. Day 2 – Wednesday 14<sup>th</sup> December

Time	Title	Speaker/Organiser
08h30 – 09h00	Registrations	
09h00 – 09h45	<b>Presentation:</b> How to elicit sustainability (or social) preferences?	By <b>Rob Bauer</b> , Maastricht University
09h45 – 10h30	<b>Discussions</b> (in pre-made groups of 5 to 7 participants)	Organised by Maastricht University
10h30 – 11h00	Coffee Break	
11h00 – 11h45	<b>Reports</b> on the Discussions	Moderated by <b>Rob Bauer</b> , Maastricht University
11h45 – 12h30	<b>Panel 2</b> – How to measure these preferences in practice?	Moderated by <b>Rob Bauer</b> , Maastricht University
12h30 – 13h30	Lunch break	
13h30 – 13h45	<b>Keynote</b> Speech	By <b>Sven Gentner</b> , Head of Unit, Corporate Reporting, Audit and Credit Agencies, EC DG FISMA
13h45 – 15h15	<b>Panel 3</b> – Roadmap to harmonised sustainability information	Moderated by <b>Josina Karmeling</b> , CFA Institute
15h15 – 15h45	Coffee break	
15h45 – 17h15	<b>Panel 4</b> – Retail lending for energy efficiency of buildings	Moderated by <b>Joost Mulder</b> , Better Europe
17h15 – 17h30	Wrap up of the event & Closing speech	<b>Nicola Koch</b> , 2Dii
17h30 – 18h30	Networking Cocktail (TBC)	
From 19h00	&/or Casual Diner for interested participants (TBC – fee payable by the participants)	



## 4. Details of the Sessions

### 4.1. Day 1 – Morning

#### **Panel 1 – How to impact energy efficiency and sustainable energy investments with sustainable financial products?**

Time: 13 December 2022, 09h30 – 10h30

Moderated by: **Nicola Koch**, Deputy Head of the Retail Investing Program, 2Dii

Speakers: TBC

Description: In this panel, speakers will discuss the various ways to increase energy efficiency and sustainable energy investments in the real economy by using financial products. Several impact mechanisms documented by academic literature will be questioned as well as their applicability for various asset classes. Minimum requirements for specific product categories necessary to exploit their impact potential will also be addressed.

#### **Workshop 1 – Generating individual and collective impact in public markets**

Time: 13 December 2022, 11h00 – 13h00

Moderated by: **Nicola Koch**, Deputy Head of the Retail Investing Program, 2Dii

Description: In this workshop, we will question the capacity of investors in public equity and public debt to effectively increase energy efficiency and sustainable energy investments. We will especially present two impact mechanisms (stewardship and signaling) that are central to impact claims in those markets and check under which conditions they are effective to drive impact. As coordination is key for effectiveness using those mechanisms, we will also investigate the functioning of “collective impact” and how to foster efficient coordinated actions.

#### **Workshop 2 – Generating more impact in private markets**

Time: 13 December 2022, 11h00 – 13h00

Moderated by: **Mickaël Mangot**, Head of the Retail Investor Research Program, 2Dii

Description: In this workshop, we will question how to raise the impact on energy efficiency and sustainable energy of investors in private equity and private debt. We will especially discuss how to leverage two impact mechanisms (service to undersupplied markets and provision of flexible capital) that are practically actionable in those markets. This will require to know how to identify undersupplied markets and which financial flexible solutions would meet the needs of project owners while conditioning them to adopt the right behaviors.

## 4.2. Day 1 – Afternoon

### Lecture & Q&A – Measuring and proving environmental impact, an impossible task - really?

Time: 13 December 2022, 14h00 – 15h00

Speaker: **Mickaël Mangot**, Head of the Retail Investor Research Program, 2Dii

Description: Environmental impact is a major selling point of some sustainable financial products while being the cornerstone of the rapidly growing segment of green “impact investing” products. Despite a stated concern for actual influence of the financial industry on energy efficiency and sustainable energy investments in the real economy, so far little is done in the actual evaluation of that environmental impact. A common explanation for such an “impact paradox” is that environmental impact measurement is practically infeasible for financial products and, consequently, attention of the industry should be focused on formalizing environmental impact intentions and actions instead of discussing measurement. Is finance really doomed to neglect impact measurement?

### Workshop 3 – Overcoming barriers of environmental impact evaluation in finance

Time: 13 December 2022, 15h30 – 17h30

Moderated by: **Nicola Koch**, Deputy Head of the Retail Investing Program, 2Dii

Description: In this workshop, we will present and discuss practical barriers to (individual and collective) impact evaluation for financial products and question the feasibility of various quantitative and qualitative evaluation methods taken from other domains, mainly public policy, philanthropy, and development finance. Based on examples, we will investigate current market practices and test proposals to advance, harmonize and democratize impact evaluation in finance.

### Workshop 4 – Responsible environmental impact claims

Time: 13 December 2022, 15h30 – 17h30

Moderated by: **Samia Baadj**, Manager & **David Cooke**, Law & Policy Lead, 2Dii

Description: This workshop will focus on greenwashing in the context of environmental impact claims in the finance sector to include: the importance of environmental impact claims in retail investor decision making; why the existing regulatory framework does not provide effective governance of environmental impact claims and what are likely routes forward for regulatory change; and how [private/financial] organisations can navigate the uncertain regulatory framework and mitigate risks through ensuring legitimate environmental impact claims.

### 4.3. Day 2 – Morning

#### **Presentation: How to elicit sustainability (or social) preferences?**

Time: 14 December 2022, 09h00 – 09h45

Speaker: **Rob Bauer**, Professor, University of Maastricht

Description: We will present some case studies (Dutch and UK pension fund, defined benefit and defined contribution context) in which we will highlight the different methods to measure preferences and their pros and cons. We will also have a look at what we have learned from our research and present our upcoming new elicitation methods in the context of mutual funds (Meesman).

Have a look at our [working paper](#).

#### **Discussions & Reports**

Time: 14 December 2022, 09h45 – 11h45

Moderated by: **Rob Bauer**, Professor, University of Maastricht

Description: Participants will be invited to discuss, provide comments based on our previous presentation, and answer a few structured questions at the table (for instance on how to apply these methods, relation to sustainability literacy etc.).

#### **Panel 2 – How to measure these preferences in practice?**

Time: 14 December 2022, 11h45 – 12h30

Moderated by: **Rob Bauer**, Professor, University of Maastricht

Speakers: TBC

Description: How to measure these preferences in practice. Which challenges do investors have? Which barriers? What is the objective of the measurement? What is current legislation and which future legislation at the horizon? What do they expect from researchers?

### 4.4. Day 2 – Afternoon

#### **Panel 3 – Roadmap to harmonised sustainability information**

Time: 14 December 2022, 13h45 – 15h15

Moderated by: **Josina Kamerling**, Head of Regulatory Outreach for the Europe, Middle East, and Africa (EMEA) regions, CFA Institute

Speakers:

- **Bryan Coughlan**, Financial Services Officer, BEUC



- **Patrik Karlsson**, Senior Policy Officer, Investment Management Team, European Securities and Markets Authority – ESMA
- **Lenny Kessler**, Portfolio Manager, WHY0
- **Raoul Köhler**, Sustainable Finance Coordinator, Autoriteit Financiële Markten – AFM
- **Aleksandra Mączyńska**, Executive Director, BETTER FINANCE

Description: With the ongoing developments in disclosure standards, amendments in the regulatory and supervisory landscape and push for increased retail investor participation in capital markets, calls for harmonisation of sustainability information in a way that is understandable to non-expert retail investors. In this session, we will look at the interplay and need to enhance PEPP, PRIIPS, AIFMD, MiFID, SRDII and SFDR Article 8 & 9 and how retail investors can navigate as well as benefit from a renewed retail investment strategy.

## **Panel 4 – Retail lending for energy efficiency of buildings**

Time: 14 December 2022, 15h45 – 17h15

Moderated by: **Joost Mulder**, Director, Better Europe

Speakers:

- **Introduction by Seán Kelly**, Member of the European Parliament
- **Anna Martin**, Financial Services Officer, BEUC
- **Mathilde Nonnon**, Sustainable Finance Policy Assistant, WWF EPO
- **Peter Sweatman**, Chief Executive, Climate Strategy & Partners
- **Jürgen von der Lehr**, Head of Strategy & Business Development, ING Germany
- **(TBC)**, EC DG ENER.B.2

Description: What if we could lower Europeans' skyrocketing energy bills and fight climate change at the same time? If we create the right financial incentives to encourage and help consumers renovate their homes, we could improve the lives of millions of Europeans while protecting our planet. The retail banking sector is uniquely well-positioned to bridge the investment gap needed to reach the EU's climate goals by offering the financing of renovations to their customers of around 50 million mortgage holders.

Join us for a panel discussion and an interactive workshop on how the Energy Performance of Buildings Directive recast (EPBD) can funnel private and public funds to make Europe's buildings truly sustainable and energy-efficient. We will discuss different measures, including creating Mortgage Portfolio Standards, to ensure that public and private funding will work together to ensure that consumers will benefit from affordable solutions to renovate their homes.

## 5. Speakers' Biography

### 5.1. Keynotes

#### **Guillaume Prache, Managing Director, BETTER FINANCE (male)**

Guillaume Prache is the Managing Director of BETTER FINANCE, the European Federation of Investors and Financial Services Users. He is also one of the experts representing financial services users before the European Commission (as member and vice chair of the Financial Services User Group – FSUG), before the European Securities & Markets Authority (as member and former chair of the ESMA Securities & Markets Stakeholder Group), before the European Insurance and Occupational Pensions Authority (as member of the EIOPA Occupational Pensions Stakeholder Group) and before the French financial regulator AMF.

He started as a magistrate at the French Court of Auditors and has an extended and international experience in financial matters, most recently as Chief Financial Officer of US-based Rhône-Poulenc Rorer, Inc., a “Fortune 500” publicly listed pharmaceutical company (today Sanofi) from 1997 to 2000, and then as Managing Director of the European subsidiary of the Vanguard Group, Inc., a global leader in asset management, from 2000 to 2006.

He has taught asset management for the CIWM (Certified International Wealth Manager) program and wrote two books (and various articles on economics and finance).

#### **Sven Gentner, Head of Unit, Corporate Reporting, Audit and Credit Agencies, EC DG FISMA (male, speaker)**

Sven Gentner is the head of unit for corporate reporting, audit and credit rating agencies in the European Commission's directorate-general for financial stability, financial services and capital markets union. He joined the European Commission in 2004 and has served in various positions in its Brussels headquarters and abroad, including as counsellor in the Economic and Financial Affairs Section of the Delegation of the EU to the United States and as head of DG FISMA's unit in charge of asset management.

### 5.2. Panels

#### **5.2.1. Panel 1 – How to impact energy efficiency and sustainable energy investments with sustainable financial products?**

#### **Nicola Koch, Deputy Head of the Retail Investing Program, 2Dii (male, moderator)**

Nicola is Deputy Head of the Retail Investing Program, which aims to empower citizens and financial institutions with the right tools to incorporate non-financial preferences in their investments.

In addition to his role at 2DII, Nicola also works as an independent sustainability consultant and analyst. His focus points lie in the field of sustainability strategy, management and campaigning. Furthermore, he is Managing Director at Generation Why, a sustainability network for students and young professionals to achieve the SDGs.

Nicola holds an M.A. in International Politics, Administration and International Relations from Zeppelin University, where he specialized in different interfaces of sustainable development. He also completed a bachelor's degree in International Economics and Development at the University of Bayreuth.

*Speakers' bio coming soon!*

### 5.2.2. Panel 2 – How to measure these preferences in practice?

**Prof. Dr. Rob Bauer, Professor, University of Maastricht (male, moderator)**

Rob Bauer is Professor of Finance (chair: Institutional Investors) at Maastricht University School of Business and Economics in The Netherlands. His academic research is focused on pension funds, strategic investment policy, mutual fund performance, responsible investing, shareholder activism and corporate governance. Rob is also Director of the European Centre for Corporate Engagement (ECCE) at Maastricht University, and Executive Director of the International Centre for Pension Management (ICPM) in Toronto.

*Speakers' bio coming soon!*

### 5.2.3. Panel 3 – Roadmap to harmonised sustainability information

**Josina Kamerling, Head of Regulatory Outreach EMEA, CFA Institute (female, moderator)**

Josina Kamerling is Head of Regulatory Outreach for the Europe, Middle East, and Africa (EMEA) region for CFA Institute, and is based in the Brussels office. She is responsible for supporting CFA Institute policy development in the region, advancing the impact of advocacy efforts, and promoting capital market integrity and investor protection.

Josina participates in working groups at policy level, is a frequent speaker at high level conferences on topics of Fair and Efficient markets, Investor Protection and Ethics.

She sits on the board of Observatoire de la Finance and is co-president of the Global Ethics prize for young people in finance: The Ethics in Finance prize.

Previously, Josina was a specialist adviser on financial services in the European Parliament for six years, and a Senior Banker as Head of Sales of various sales teams in financial markets both retail, institutional, central banks and corporates and as a global banker for large energy multinationals for 15 years in various EU countries.

**Bryan Coughlan, Financial Services Officer, BEUC (male, speaker)**

Bryan Coughlan is a Financial Services Officer at BEUC, The European Consumer Organisation. In this capacity he works closely on consumer protection issues in retail investment markets. This includes sustainability disclosures and regulation of sustainable investments. The Retail Investment Strategy and they major files of the EU Sustainable Finance Strategy have been the most recent fields of engagement. Prior to working at BEUC, Bryan worked at the Federation of German Consumer Organisations in Berlin, in the financial markets team. Bryan Coughlan holds a B.A in economics and a M.A. in international economics, both from the university of Göttingen.

**Patrik Karlsson, Senior Policy Officer, Investment Management Team, European Securities and Markets Authority – ESMA (male, speaker)**

Patrik works as a senior policy officer in the investment management team at ESMA, which he joined in April 2019. He contributes to investment fund policy development, focusing on sustainable finance and disclosure, fund liquidity and leverage, and alternative investment fund management. Previously he worked at the International Capital Market Association (ICMA), Prudential plc, and the British Banker’s Association in EU Government Affairs and policy development on investment fund, insurance and banking issues.

**Lenny Kessler, Portfolio Manager, WHYO (male, speaker)**

After 15 years of experience in asset management, mainly in Asia for European institutions and private clients (HNW), Lenny Kessler became an entrepreneur with a desire to contribute to the development of sustainable finance.

Today, he puts his experience in investment and transformation at the service of various players to better integrate extra-financial factors (ESG & Impact) in their processes, from investment analysis, to due diligence, to portfolio construction, to regulatory and commercial reporting.

Lenny also chairs the ESG committee of CFA Society France.

**Raoul Köhler, Sustainable Finance Coordinator, Autoriteit Financiële Markten – AFM (male, speaker)**

Raoul Köhler is a Senior Policy Advisor for the Dutch Authority for the Financial Markets (AFM). Raoul has worked as supervision officer and policy advisor at the AFM since 2015. In his capacity as policy advisor he fulfills the role of Sustainable Finance Coordinator, a position he has held since early 2020. Raoul is, amongst others, involved in the European network on sustainable finance at the European Securities Markets Authority (ESMA) and has co-authored the joint [AMF/AFM position paper](#) on ESG rating and data agencies.

**Alekzandra Mączyńska, Executive Director, BETTER FINANCE (female, speaker)**

Aleksandra Mączyńska is from Warsaw, Poland, where she was the Deputy Director of the International Relations and Communication Department of the Polish consumer and competition watchdog.

She studied at the Faculty of Management at the Poznan University of Economics and at the Warsaw School of Economics. She has also a vast experience in management of international projects, e.g., EU funded capacity building projects. As a Fellow of the Robert Bosch Foundation Programme for the Young Executives from the Public Sector, she worked at the Division for World Bank International Monetary Fund, Debt Issues and International Finance Structure at the German Federal Ministry for Economic Cooperation and Development. She was an expert at various EU Council's Working Parties such as the WP on Financial Services and WP on Competitiveness and Growth, as well as European Commission's Working Groups and Advisory Committees. One of her tasks was also external representation and managing professional networks such as Consumer Policy Network (CPN), International Consumer Protection and Enforcement Network (ICPEN), European Competition Network (ECN) and OECD Competition Committee.

*More Speakers' bio coming soon!*

#### **5.2.4. Panel 4 – Retail lending for energy efficiency of buildings**

##### **Introduction by Seán Kelly, Member of the European Parliament (male)**

Seán Kelly has been an MEP for Ireland South since 2009. He is the leader of Fine Gael in the European Parliament and a member of the EPP Group.

Kelly sits on the European Parliament's Committees on the International Trade (INTA), Industry, Research & Energy (ITRE), and Constitutional Affairs (AFCO).

He has led on important policy work, such as the General Data Protection Regulation (GDPR), setting the 2030 target for Renewable Energy, finalising the EU's €650 billion InvestEU programme, and securing a majority in favour of the EU-Singapore Free Trade Agreement.

He has also been heavily involved in Climate Action, and has represented the Parliament at several UNFCCC Conferences including COP 27 in Egypt. Seán is highly involved in the implementation of the "Renovation Wave" and energy efficiency measures in the built environment.

Seán is currently the lead MEP for UK trade matters in the European Parliament and Chair of the UK Monitoring Group for matters relating to Brexit, as well as First Vice-Chair of the European Parliament's standing delegation to the EU-UK Parliamentary Assembly.

##### **Joost Mulder, Director, Better Europe (male, moderator)**

Joost Mulder is a European affairs expert with 18 years of experience in EU financial services legislation, including retail finance, financial markets and products, sustainability and financial stability. In 2017 he founded the consultancy Better

Europe Public Affairs, advising civil society groups defending environmental, human rights and shareholder interests.

Joost started his Brussels career in 2004 working in the European Parliament as an MEP assistant on the Financial-Services Action Plan and retail finance, before joining a financial industry lobby consultancy in 2007. In 2011 he switched sides to the NGO Finance Watch, where we worked on legislation such as MiFID II and PRIIPs. Throughout his career he has been involved retail finance discussions including in the last four years as a member of the Financial Services User Group on behalf of Belgian NGO FairFin.

**Anna Martin, Financial Services Officer, BEUC (female, speaker)**

Anna Martin is Financial Services Officer at BEUC, the European Consumer Organisation. She is in charge of retail banking, working on consumer credits and mortgage credits with a specific focus on green loans. Before joining BEUC, she worked for the German Foreign Office in the team coordinating the German EU Council Presidency. Anna holds a Master in European Affairs from the College of Europe, Sciences Po Lille and the University of Münster.

**Mathilde Nonnon, Sustainable Finance Policy Assistant, WFF EPO (female, speaker)**

Mathilde Nonnon is Sustainable Finance Policy Assistant at WWF European Policy Office. She works on issues related to retail banking, consumer credits and mortgage credits for energy efficiency improvements. Before joining WWF, Mathilde was involved in several other NGOs defending environmental and human rights interests. Mathilde holds a Master's in European Law from Maastricht University.

**Peter Sweatman, Chief Executive, Climate Strategy & Partners (male, speaker)**

Peter Sweatman has spent 30 years in finance of which 18 are climate finance and energy efficiency. He is the Chief Executive of Climate Strategy & Partners (@ClimateSt and [www.climatestrategy.com](http://www.climatestrategy.com)), a strategic consulting group in Clean Energy, Clean Technology Innovation and Energy Efficiency working with leading companies and policymakers in the global energy transition. Peter is also Chairman and founder of Energy Efficiency Capital Advisors ([www.eecapadvisors.com](http://www.eecapadvisors.com)) an expert solution provider and finance structuring partner for over Euro 60 million of finance for energy savings and on-site power in Spanish cities.

Peter has published fifteen white papers and chaired, moderated or spoken at 380 conferences and workshops on the global energy transition to a climate neutral economy.

Peter is the rapporteur for EU Commission and UNEP FI's 500-strong Energy Efficiency Financial Institutions Group (#EEFIG) since 2013 and for five years was the G20's EEFTG technical lead. He is the co-chair of Breakthrough Energy's European Climate Innovation Hub, a founder advisor to the Climate Bond Initiative, a founder member of the Ashoka Support Network in Spain, advisor to the Climate Lab, advisor to Braemar Energy Ventures, on the steering committees of EY and CapGemini Invent's work on green recovery and climate innovation, a board member of Menorca

Preservation Fund and visiting lecturer at IIT-Comillas university. Peter chaired and reported on a 250-expert process to help design the EU ETS Innovation fund and published a review of EU finance for competitive innovation for net-zero emissions by 2050.

Peter holds an MA Cantab degree in Engineering and Management Studies from Cambridge University. In 1991, he joined JPMorgan in Corporate Finance where he spent 9 years responsible for client business, mainly in debt capital markets, for Spain, Portugal, Austria and Switzerland based in London and then for Mexico and other Latin American countries from New York. In the year 2000, Peter became a social entrepreneur to found three successful and high impact NGOs: Charity Digital ([www.charitydigital.org.uk](http://www.charitydigital.org.uk)), New Philanthropy Capital ([www.thinknpc.org](http://www.thinknpc.org)) and Catalyst Climate Change Trust. From 2005, Peter was a Managing Director in Bunge-Climate Change Capital that was – from 2004- 2010 - one of the world's leading specialist fund managers and advisors in the low carbon economy.

### **Jürgen von der Lehr, Head of Strategy & Business Development, ING Germany**

Jürgen von der Lehr, born in 1972, studied business administration and economics at University of Mannheim and received his diploma in 2000.

He began his professional career at Deutsche Bank AG in Mannheim where he completed his training as a banker in 1994 and served as a Credit Analyst parallel to his studies at university. In 2003 he joined BearingPoint GmbH in Frankfurt as a Consultant, being responsible for projects in the area of Commercial and Retail Banking as well as Asset Management.

In 2004 he joined DZ Bank AG as Manager Inhouse Consulting. In 2005 he moved to Warsaw to serve as an Interim COO at DZ Bank Polska S.A. End of 2006 he moved back to Frankfurt to serve DZ Bank as Strategic Business Development Manager, being responsible for strategic and operative development of the Central and Eastern European (CEE) partnerships and shareholdings.

In 2007 he joined A.T. Kearney GmbH in Frankfurt and Dubai office to work on cutting edge strategy projects for leading European and international banks as Senior Consultant.

2010 Jürgen von der Lehr joined Deutsche Bank AG Frankfurt. He started as Senior Manager at Group Management Consulting. In 2011 he became Head of Strategy at Deutsche Bank AG, Private & Business Client Division where he was responsible for the strategic agenda and the branch network strategy. 2014 he became Head of Online Brokerage with full business ownership. 2016 he got promoted and became Head of Think Tank, Digital Innovation & Online Brokerage.

2018 he stepped out of the Deutsche Bank AG cosmos and served as Management Consultant / Partner at Oliver Wyman GmbH.

In 2018 Jürgen von der Lehr joined ING-DiBa AG as Head of Daily Banking & Payments, owning end-to-end responsibility for all payment, account, and ecosystem related topics. He successfully developed the strategic roadmap and implemented e.g.

mobile payment solutions; new account model plus delivered significant process optimizations. Since July 2020 he is Head of Strategy & Business Development, responsible for Corporate Strategy, Portfolio Steering, Innovation Management, M&A, Fintech Strategy and Co-operations and Sustainability. In addition, from October 1st, 2021, Jürgen von der Lehr acts as Branch Manager of ING-DiBa Austria.

*More Speakers' bio coming soon!*

### 5.3. Other Moderators & Speakers

#### **Mickaël Mangot, Head of the Retail Investor Research Program, 2Dii (male)**

Mickaël is Head of the Retail Investor research program, which investigates the preferences and beliefs of retail investors about green financial products and the supply of those products by the financial industry.

Mickaël is an economist with an expertise on matters at the crossroads with psychology and finance. That includes behavioral economics and finance, happiness economics and sustainable finance. He transmits his expertise through award-winning books, lectures in business schools, trainings for professionals and conferences. He is the founder of the Institut de l'Économie du Bonheur in Paris.

Mickaël holds a Master of Science in Management from ESSEC Business School, a Master of Science in Applied Economics from the Institut d'Études Politiques de Paris and a PhD in Economics from La Sorbonne University.

#### **Samia Baadj, Manager, 2Dii (female)**

Samia Baadj is a Senior Manager at 2Dii, based in the Paris office. Samia focuses on research linked to 2Dii's Retail Investing Program, notably responsible marketing and integration of sustainability preferences in the advisory process.

Prior to joining 2Dii, Samia was a Manager for Deloitte, working on regulatory matters for the financial sector. Before that she was a compliance analyst for Natixis Investment Managers in Luxembourg.

Samia obtained the French legal bar exam (CAPA) in 2013 and also holds a diploma of legal and economic translator from ISIT School (French, English, and Spanish).

#### **David Cooke, Law & Policy Lead, 2Dii (male)**

David Cooke is Law and Policy Lead at 2° Investing Initiative and joined in 2019. His work involves monitoring and coordinating 2° Investing Initiative's input to sustainable finance policy initiatives globally. He is a UK qualified lawyer, and previously worked at ClientEarth focusing on the application of corporate and financial law to climate change and broader environmental, social and governance issues.