



Social Investment Forum



Global Sustainable Investment Organizations Hold First International Strategic Meeting

Washington, D.C.///March 18, 2011/// In early March, the leaders of sustainable and responsible investment associations around the world gathered for an unprecedented two-day strategic summit meeting in New York City. The seven representatives of major financial hubs and regions included the Social Investment Organization (Canada), Social Investment Forum (USA), UKSIF (United Kingdom), in addition to ASrIA (Asia), RIAA (Australia and NZ), Eurosif (Europe), and AfricaSIF.

While the organizations have worked together informally and virtually for years, this summit was the first time they gathered in the same room to look at raising their global profile together and advancing a more sustainable economy at all levels.

With a near universal increase in assets invested through sustainable and responsible investment strategies, the strategic meeting was seen as an opportunity to build on the significantly increased interest in responsible and sustainable investment.

The discussion focused on potential research collaboration, global policy initiatives, professional education for the socially responsible and sustainable investing industry and the sharing of best practices among organizations. Several points of agreement included the decision to increase collaboration in the methodology and in the way assets are counted for the flagship *Trends* reports in 2012, allowing investors to have a more comprehensive international picture of responsible investments.

Further, the representatives agreed that national regulations and objectives necessitate action on policy at a national level, but all agreed that there were priorities that could be jointly addressed. Participants also agreed that the focus in 2012 would be on increased corporate disclosure on environmental, social and governance (ESG) issues.

Additionally, the global leaders shared some of their unique country and regional insights in a “Trends in Sustainable Investment Roundtable” hosted by Bloomberg and US SIF on the evening of March 10. Discussion topics included corporate disclosure and reporting, shareholder activism, global human rights standards and opportunities in emerging markets.

Lisa Woll, CEO of the US Social Investment Forum said: “US SIF was absolutely delighted to host our international colleagues last week. We believe that an increasingly global society and financial system require strong relationships among all the groups working on sustainable and responsible investing. We see this meeting as the first of many steps that we will take to raise our joint profile globally and to increase the impact of our individual organizations.”

The leaders agreed to meet annually going forward and to help advance sustainable investment organizations across the world.

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Contacts:

AfricaSIF

Graham Sinclair, Advisory Committee
africasif@gmail.com

ASRIA - Association for Sustainable & Responsible Investment in Asia

Rebecca Mikula-Wright, General Manager
rebecca@asia.org, +85 2 3105 3701

Eurosif

Matt Christensen, Executive Director
Press@eurosif.org +33 1 48 03 92 01

Responsible Investment Association Australasia

Louise O'Halloran, Executive Director
louiseo@responsibleinvestment.org, +61 (0)2 9025 5711

Social Investment Forum (United States)

Lisa Woll, Chief Executive Officer
lwoll@socialinvest.org, +1 202-872-5358

Social Investment Organization (Canada)

Eugene Ellmen, Executive Director
ellmen@socialinvestment.ca, +1 416-461-6042

UKSIF – the sustainable investment and finance association (United Kingdom)

Lisa Wootton, Project Manager
lisa.wootton@uksif.org, +44 (0) 20 7749 9950

