



2 CEO's WELCOME

3 POLICY INFLUENCING

4 2020 EVENTS REVIEW

4 GOOD MONEY WEEK

5 2021: UKSIF EVENTS LINE UP

6 KEY DATES FOR YOUR DIARIES

7 BENEFITS OF MEMBERSHIP





CEO's WELCOME

As we move on from a very challenging year, we have much to be optimistic about in 2021. The fast-paced vaccine roll-out seems to be the light at the end of the tunnel for the Covid pandemic and its restrictions, the Biden administration is bringing the US back into the global climate fight, and the Brexit trade deal brings a degree of certainty to the UK-EU relationship for the first time in 4 years.

At UKSIF we also have lots to be positive about. Our new CEO and staff team have a strong mandate and vision to enhance the organisation's reach, achieve more for our members and help build a strong sustainable finance community. Recent years have seen positive changes in the way the public, media, politicians, regulators and industry respond to environmental, social and governance issues. Across the world, countries and companies are setting net zero targets, we are seeing new regulation on sustainability disclosures, ESG-aligned products are in growing demand, and social issues are increasingly being considered in investments in ways never seen before.

As we commence celebrations for UKSIF's 30th anniversary this year, we have a bold ambition to grow UKSIF's impact and influence, increase our value to members and enhance our visibility.

In the first few months of 2021, we will undertake a wide membership consultation process to develop a new Policy Vision for UKSIF, heralding the start of a more proactive approach to policy influencing. This vision will articulate UKSIF's policy ambitions for the years ahead and set out how the UK can become the world's leading sustainable finance hub. Creating a new vision is also significant recognition of the great success of UKSIF's policy work and the realisation of many of the policy changes we have campaigned for over many years.

2021 will also see the start of an enhanced UKSIF membership events programme aiming to share the latest sustainable finance knowledge and developments with our members. Focused on the overarching themes of the Big Picture in ESG and the Sectoral Dimension, our events programme is certain to prove valuable and insightful across the sustainable finance community.

A further member benefit will launch in 2021, with the arrival of the UKSIF Knowledge Hub. This online resource will bring together key studies, research, event recordings and news articles across multiple topics, acting as a first point of contact for analysis of new sectors and building understanding on some of the most pressing ESG topics.

Finally, with an enhanced focus on leadership and innovation, 2021 is set to be a busy, yet transformational year for UKSIF and our mission.

We look forward to working with you this year.

JAMES ALEXANDER
UKSIF, CEO



POLICY INFLUENCING

POLICY SUCCESSES IN 2020

UKSIF continued to help positively shape the policy landscape for sustainable finance in 2020, and achieved a number of successes across different areas.

We saw the UK Government commit to some of our long-standing policy positions; for example, in his keynote address to the Green Horizon Summit, the Chancellor, Rishi Sunak, confirmed plans for mandatory TCFD reporting across the economy and the issuance of green gilts. Our long-running advocacy, in collaboration with others in the sector, for a UK national infrastructure bank also paid dividends, with an announcement of the bank alongside the UK's national infrastructure strategy.

We secured important changes in pensions and savings policy, engaging closely with policymakers on the Pension Schemes Bill, including helping draft amendments for Peers in the House of Lords, and successfully lobbied for pension schemes to report against the TCFD framework as mandatory. To conclude the year, we were delighted the Government confirmed in December that it would take forward our recommendation outlined in our report published in February for a central directory of schemes' Statement of Investment Principles (SIPs), which will allow for better scrutiny of schemes' ESG investment policies.

In terms of the UK's future regulatory framework post-Brexit, UKSIF's wording on the need for the UK to 'match the ambition' of the EU's Sustainable Finance Action Plan was adopted, and we were pleased government recognised the importance of regulatory alignment going forward.

We want to build on this success and continue to influence UK policymaking to promote a more sustainable financial system, and deliver changes for the benefit of society and the environment that can work in practice for our members.

POLICY PLANS FOR THE YEAR AHEAD

We know there is much further to go, and after achieving a number of our existing policy objectives we now want to outline our new policy vision setting out the UK sustainable finance community's vision for how we should cement our global leadership. We will be publishing our policy vision this summer as part of the celebrations for UKSIF's 30th anniversary.

We will be consulting our members on the vision's policy asks, and will be taking steps in the meantime to lobby government and campaign for changes. Immediate priorities will include: ensuring the UK's post-Brexit rules are fit for purpose and aligned with the highest global standards, making sure the government's national infrastructure bank is a long-term vehicle for sustainable and green investment, promoting high standards in the UK's future listings regime, ensuring the implementation of the UK's 'Roadmap towards mandatory climate-related disclosures', among other priorities.

We will also continue to contribute to the UK's preparations for COP26 in Glasgow, including through our membership of the Government's Finance Coalition Coordination Mechanism (FCCM) which seeks to push for voluntary finance industry net zero commitments.

We are always keen to hear your views to help shape our policy and public affairs activity. We will look to keep you regularly informed on policy developments in sustainable finance, including through our policy newsletter, and major events such as the Budget statement. We will also be making changes to our website to provide members with easier access to our archive of consultation responses, letters to policymakers and policy briefings.



SHARING KNOWLEDGE AND BUILDING THE COMMUNITY

2020 EVENTS REVIEW

During a year of change and upheaval, UKSIF was able to seamlessly switch to online delivery, continuing to share knowledge with and between members including hosting our two annual flagship conferences and AGM, addressed by Kwasi Kwarteng MP, with tremendous success. We discovered new ways to connect whilst becoming more creative and efficient.

FLAGSHIP CONFERENCES

Our Edinburgh – Spring Conference, supported by Ballie Gifford, attracted more than 200 delegates. A key theme at the conference was the need to keep momentum on climate change with the forthcoming UK COP. We also focused on the emerging Covid pandemic, with sessions looking at how we recover in a sustainable way.

Our London – Autumn Conference, supported by Vigeo Eiris, MSCI and Neural Alpha, increased the attendance to more than 400 delegates. Our key themes were: the Big Picture: ESG in 2020, featuring sessions on net zero, building back better from Covid and race and diversity, and the Sectoral Dimension, taking a deep look into the future risks and opportunities in aviation, plastics, bio fuels, fast fashion and pharmaceuticals.

OUR WEBINAR SERIES

Throughout the year we continued our efforts to keep UKSIF members informed of the major developments in sustainable finance. We hosted a series of webinars on the following topics:

- BSI's 'specification' for responsible fund management
- COVID-19 & Sustainable Finance
- Appetite for disruption - The protein revolution
- US election and its potential impacts on sustainable finance
- The EU Sustainable Finance Disclosure Regulation (SFDR) and where we stand

Recordings of these webinars are available to view on the [UKSIF website members area](#).

GOOD MONEY WEEK

Our 12th annual national awareness campaign for consumers was another huge success. We achieved nearly 300 million potential media impressions with 55 articles and interviews. Coverage included ITV, Forbes, Metro, Independent, FT, Good Housekeeping, Daily Mirror, SKY News, LBC Radio, Times Radio & Jazz FM. We also saw big retail brands align their media plans with the week.

We called for consumers to use their money to help Build Back Better and provided a beginner's guide to how. With the support of Aberdeen Standard, Aviva, Stewart Investors and Liontrust, we also produced a report on investor attitudes to sustainable investing and seven ways to better attract new sustainable investors. We also ran two webinars:

- Clean, green and kind money for beginners
- The role of retail investors on helping the UK to build back better

▶ More information and webinar recordings are available on the [Good Money Week website](#).

CLEAN SLATE
GREEN
SLATE





2021: UKSIF EVENTS LINE UP

UKSIF's events programme, curated with the support of our Analyst Committee, informs members on the most pressing topics in sustainability and provides direct support on the latest developments and ways to approach new policies and regulations. With our audience reach increasing from previous years, we are planning an enhanced events and networking programme to help sustainable finance professionals from across the sector connect and learn from one another.

Our plan is for 30+ annual events, including four flagship conferences, our new monthly webinar series, hosted on the first Tuesday of each month, informal industry roundtables and briefings. Our events will operate under our themes of the *Big Picture in ESG*, sharing the latest developments across the ESG space, and the *Sectoral Dimension*, diving into the challenges, opportunities and risks facing different industry sectors in the transition to a sustainable economy. In this landmark year for UKSIF we are also planning a high level 30th anniversary event which will also mark the launch of UKSIF's Policy Vision.

Key topics selected by UKSIF's Analyst Committee for 2021 events include net zero, impact measurement, disclosure and reporting, biodiversity, modern slavery, the just transition, carbon pricing, carbon capture, water, natural capital, hydrogen and energy efficiency.

We will also help our members keep sight of the international landscape by promoting and organising events alongside our partners Eurosif and the Global Sustainable Investment Alliance.

To complement our knowledge sharing events, during 2021, we will build UKSIF's new Knowledge Hub in our website members' area. This will capture all our event recordings, as well as the latest reports, data, research and press articles across key topics and form a vital first point of reference for analysts across our membership.

Big Picture
in ESG



Sectoral
Dimension



UKSIF provides access to a community of ESG leaders within the UK financial services landscape. UKSIF is a unique platform for connection between asset managers, banks, asset owners and advisors and is known for providing the latest thinking amongst leaders on key ESG topics in the UK.

CATHRINE DE CONINCK-LOPEZ

Global Head of ESG, Invesco

KEY DATES FOR YOUR DIARIES

2 FEBRUARY 2021	Monthly webinar – Beyond Compliance: Investor Engagement on Modern Slavery
2 MARCH 2021	Monthly webinar – Net Zero
POST-MARCH	Further webinars will take place on the first Tuesday of each month
25 MARCH 2021	Ownership Day
28 APRIL 2021	30th Anniversary
26-27 MAY 2021	Spring Conference
SEPTEMBER 2021	AGM
2-8 OCTOBER 2021	Good Money Week
24-25 NOVEMBER 2021	Autumn Conference

▶ Please continue to monitor the [UKSIF website](#) and email newsletter for information on forthcoming events.



BENEFITS OF MEMBERSHIP

UKSIF member benefits will continue to be enhanced in 2021, providing increased member support and greater impact across a wide range of areas.

POLICY

- Contribute to our policy positions and consultation responses and ensure your voice is heard at the heart of government on environmental, social and governance issues in finance
- Stay up-to-date on political developments, consultations and decisions that impact your work
- Access UKSIF's library of policy briefings

KNOWLEDGE

- Share and showcase your innovations and good practices with peers in sustainable finance and learn from the innovations, successes and insights of others
- Receive unbiased practitioners' opinions and solutions on complex issues
- Access UKSIF's Knowledge Hub, to be launched during 2021

NETWORK

- Attend our Conferences and Webinars with peers across the industry to participate in thematic, policy, and sector discussions
- Network with other leaders in finance, government, sustainability and civic society
- Participate in targeted roundtables on topics relevant to you

LEADERSHIP

- Strengthen your position as a leader in sustainable finance
- Engage with other sector leaders to shape the direction of UK Sustainable Finance
- Share your leadership on sustainable investment and finance with key audiences

INNOVATION

- Develop shared solutions to common challenges
- Step outside the day-to-day to consider the opportunities of the future
- Build an understanding of long-term trends to spark new products and solutions

INTERNATIONAL INFLUENCE

- Benefit from UKSIF's membership of Eurosif and the Global Sustainable Investment Alliance
- Retain an ongoing voice in the development of EU sustainable finance regulations and updates on the latest developments in Brussels
- Benefit from our cooperation with SIFs across the world and other global organisations to progress our shared agenda

SHOWCASE YOUR BRAND

- UKSIF membership presents many opportunities to showcase your work and products across the sustainable finance sector
- Highlight your products and services to an influential audience
- Please contact us if you would like to discuss partnership opportunities and receive a copy of our 2021 Partnership Prospectus

**BECOME AN
UKSIF MEMBER
TODAY**



UK Sustainable Investment and Finance Association (UKSIF)

-  info@uksif.org
-  www.uksif.org
-  +44 (0) 20 7749 9950
-  [uksif](#)