



Swiss Sustainable Finance – Finance for the Future

SSF Annual Report 2018

Contents

- 1 Foreword by the President and the CEO.....3
- 2 SSF in numbers 4
- 3 Activities in 2018 6
 - 3.1 Sustainable finance information 6
 - 3.1.1 SSF Digital Library on Sustainable Finance 6
 - 3.1.2 Events7
 - 3.1.3 Media Work.....7
 - 3.1.4 Swiss market intelligence: Swiss sustainable investment market study 2018 8
 - 3.2 Facilitation of sustainable finance education..... 8
 - 3.2.1 Workgroup Sustainable Finance Education 8
 - 3.2.2 SSF Training activities 8
 - 3.2.3 FOEN/SSF education project..... 9
 - 3.3 Sustainable investments in private wealth management 9
 - 3.3.1 Workgroup renamed and restructured 9
 - 3.3.2 Engagement Initiative: Letter to index providers on contro. weapons exclusions10
 - 3.4 Investments for development10
 - 3.5 Financing the transition to a low-carbon economy..... 11
 - 3.6 Sustainable cooperation with members & partners..... 11
 - 3.7 Political dialogue.....12
 - 3.7.1 Formal dialogue with different federal authorities12
 - 3.7.2 Regular informal dialogue with different federal authorities12
 - 3.8 International representation and recognition..... 13
 - 3.9 Involvement of institutional asset owners (IAO)..... 13
 - 3.10 Local workgroup Ticino14
- 4 SSF as an organisation 15
 - 4.1 SSF members and network partners 15
 - 4.2 SSF Board 18
 - 4.2.1 Board members.....18
 - 4.2.2 Board activities.....19
 - 4.3 SSF team 20
- 5 Appendix..... 21
 - 5.1 List of Board members by member type, region and gender..... 21
 - 5.2 Glossary 22

1 Foreword by the President and the CEO

The past year again was one with many “firsts” for SSF, a fact that demonstrates the ability of our association to flexibly adapt to the needs of its members and market developments. For the first time, SSF prepared an encompassing market study on sustainable investments, in which we offered insights into the dynamic market development, and also provided views from representatives of Swiss federal authorities as well as case studies on institutional asset owners’ sustainable investment policies. The organisation of an international conference on the topic of “Inspiring investment partnerships to achieve global goals”, attracting around 200 participants from 12 countries, was another premiere. Furthermore, SSF organised new workshops exclusively for its members base, offering a platform to gain topical insights on climate tools and the impact of investments and discuss their relevance with peers.

2018 was a year for more international outreach, too. Having joined the global network Financial Centres for Sustainability (FC4S) and its steering committee in late 2017, related activities started in 2018, encompassing international meetings, position papers and the development of an assessment program to demonstrate progress in different financial centres. With regards to the EU Action Plan on financing sustainable growth, SSF prepared a position paper in spring 2018. We later used the opportunity to give feedback on different elements of the action plan in the course of public consultations.

Apart from such new activities, SSF further followed its objective to provide topical insights into state-of-the-art sustainable finance solutions. The new e-learning tool on sustainable investments and the digital library, which gives access to important reports and publications, are just two examples of how SSF informs its members and a wider audience. The continuously growing members base – by end of 2018 SSF counted on the support of 114 organisations – illustrates that its services face growing interest and are perceived as useful.

At a workshop in January 2019, the SSF Board took stock of the achievements so far, and – more importantly – discussed ways to adapt the strategy to recent developments. A more active role in creating guidelines and standards related to sustainable finance and deepening the influence on Swiss frameworks, as well as a stronger cooperation with other players, were some of the targets set.

The present report provides in-depth insights into the activities of our association. We feel confident that SSF will keep contributing to establishing the Swiss financial centre as a major player in the realm of sustainable finance.



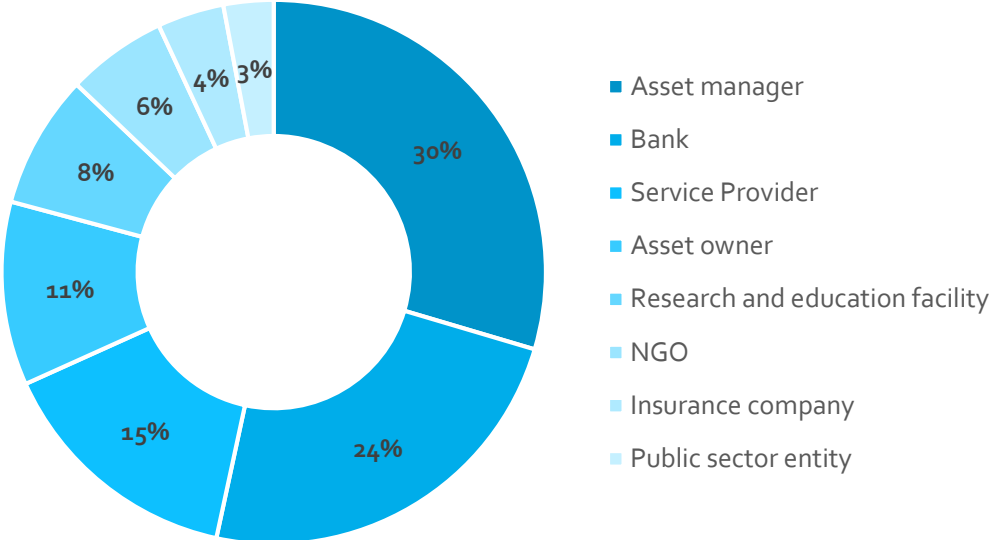
Jean-Daniel Gerber
President of Swiss Sustainable Finance



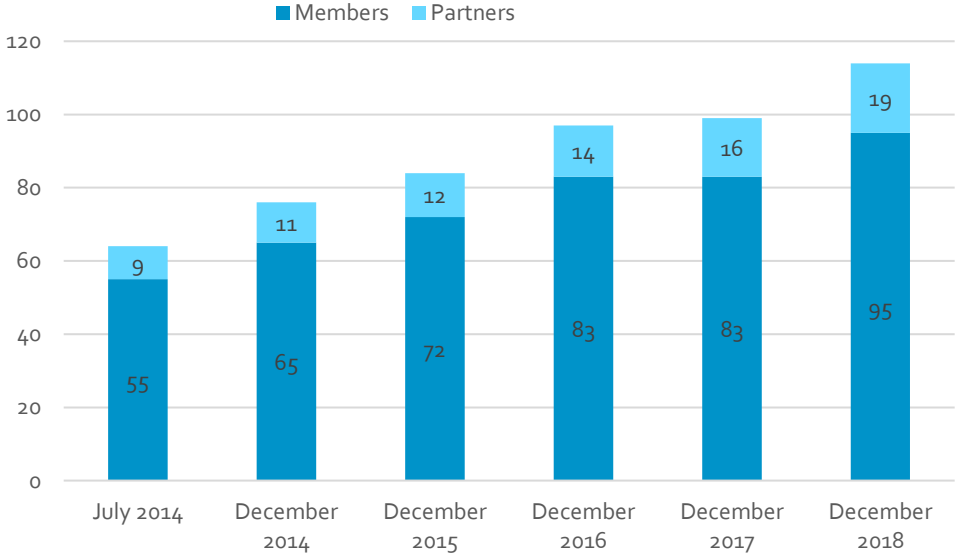
Sabine Döbeli
CEO Swiss Sustainable Finance

2 SSF in numbers

SSF had 114 members and network partners by Dec. 2018



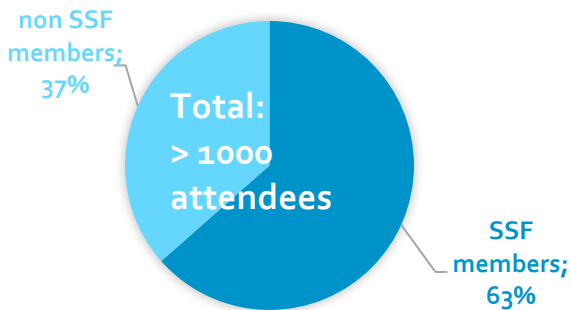
Growth of SSF member and network partner base



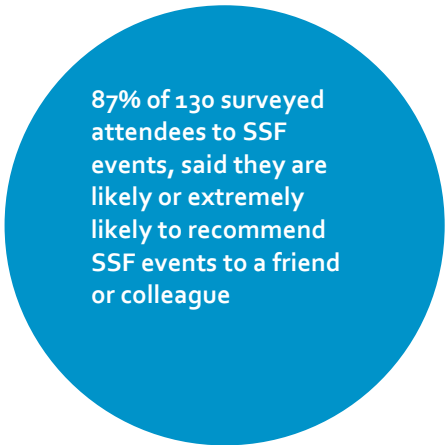
SSF's successful event track record in 2018



9 SSF events* in 2018 attract large share of non-members

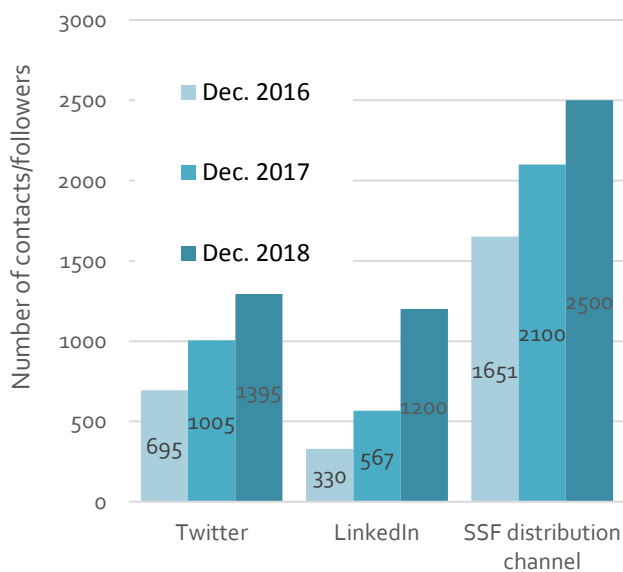


*SSF organized or co-organized

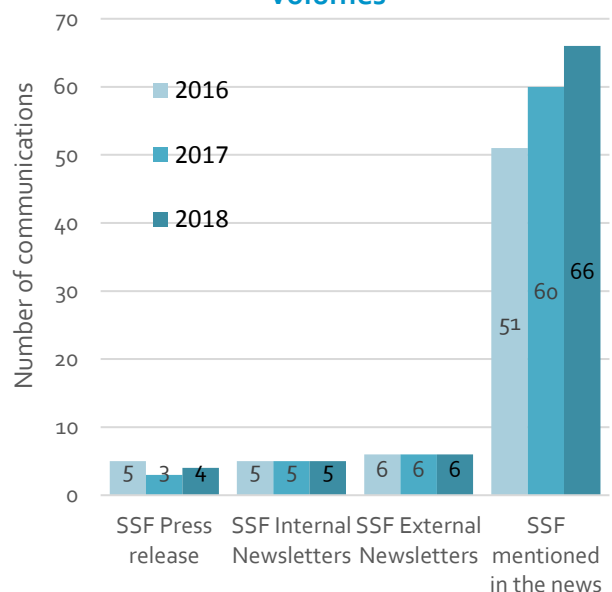


SSF's communication activities result in strong media presence

Growth in SSF's media channels



SSF Communication channels and volumes



3 Activities in 2018

In this section, we outline the most important activities SSF realized in 2018, grouping them according to the priorities defined in the SSF strategy (approved by the board in December 2017).

The figure below illustrates the nine strategic priorities of SSF as outlined in its strategy 2018/2019. This strategy is based on four identified value chain elements and corresponding outcomes: Knowledge management, Service development, Relationship building and Market development.

SSF Strategic priorities



No	Strategic priority	KM	SD	RB	MD
1	Sustainable finance information	X		X	
2	Facilitation of sustainable finance education	X		X	
3	Sustainable investments in private wealth management		X		X
4	Investments for development	X	X		X
5	Financing the transition to a low-carbon economy		X		
6	Sustainable cooperation with members & partners			X	
7	Political dialogue			X	X
8	International representation and recognition			X	
9	Involvement of institutional asset owners (IAO)	(X)		X	X

Value chain elements: KM = Knowledge Management, SD = Service Development, RB = Relationship Building, MD = Market Development, core element identified in bold

3.1 Sustainable finance information

3.1.1 SSF Digital Library on Sustainable Finance

In light of the growing body of research on sustainable finance, SSF created a [Digital Library on Sustainable Finance](#), which was launched in July 2018. It is designed to help users easily find the information they need, whether it be market research, reports, guidance documents or scientific articles.

The Digital Library currently contains 350 reports in up to four languages (EN,DE,FR,IT) and is updated on a regular basis. Users benefit from short summaries of each publication provided by SSF.

3.1.2 Events

In addition to the nine events organized by SSF and five co-organized events in 2018, SSF was involved in 20 third-party events, serving as guest speakers or moderators. 2018 was the first year in which SSF held exclusive member events and workshops, which were highly valued by the SSF network. These included 3 workshops on the new SSF education tools for financial professionals, a joint workshop with Climate-KIC on metrics for a sustainable capital shift and a workshop on measuring the impacts of investment portfolios with a presentation from the Impact Management Project (IMP). Joint events were held with organisations such as PRI, CFA and Convergence. These third-parties were very valuable in shaping the content and structure of the events.

In 2018, SSF was particularly excited about its first international conference in Zurich on 16 January, where some 240 participants from 12 countries seized the opportunity to inform themselves about innovative partnerships for development investments. You can read more on this in section 3.4.

SSF surveys attendees after each event, and witnessed extremely high satisfaction levels (87% of the over 100 surveyed individuals said they are likely or extremely likely to recommend SSF events to a friend or colleague).

Event films and recordings of key sessions were produced for two of our 2018 events providing those not able to join the opportunity to gain access to some of the valuable information presented. Summaries of all the 2018 events can be found at: http://www.sustainablefinance.ch/en/2018-_content---1--3119.html.

3.1.3 Media Work

In addition to SSF's four multi-language press releases in 2018, SSF continued to work with various media partners to bring the topic of sustainable finance into mainstream media channels. SSF has also built up a network of journalists who recognize SSF's expertise in the field and are in regular personal contact. SSF used this network during a press conference held prior to the launch of the 2018 Market Study.

In 2018, SSF was mentioned in notable media from all language regions in Switzerland well over 60 times. These include amongst others:

- Print articles in Neue Zürcher Zeitung, Finanz und Wirtschaft, finews, L'Agefi, Le Temps and Corriere del Ticino, as well as numerous specialized Media platforms.
- Television interviews in [RSI](#), [SRF Börse](#), and
- Radio interviews SRF4 News Radio

In addition, due to an international initiative coordinated by SSF (read more in section 3.3), SSF also was mentioned in international media by IPE and Financial Times (FT).

SSF's media channels continued to grow in 2018 (see figure: growth in SSF's media channels) ensuring an even wider distribution of SSF communications.

3.1.4 Swiss market intelligence: Swiss sustainable investment market study 2018

This was the first year that SSF administered the survey independently, partnering with the University of Zurich for data aggregation and analysis. A record number of 66 organisations responded to SSF's sustainable investment market survey 2018. The publication of the study in May 2018 received great uptake by the Swiss media and has been praised by industry players as a valuable tool to gain market insights.

The SSF market study workgroup continues to support the preparation of the next market studies, during frequent meetings to adapt and update the questionnaire.

3.2 Facilitation of sustainable finance education

3.2.1 Workgroup Sustainable Finance Education

SSF's online training modules, jointly with accompanying presentations, were finalised in summer 2018 and made available at no cost to all SSF members with plans to also make the material available to the broader public at a later stage. The workgroup, together with workgroup leader Kate Cacciatore from Edmond de Rothschild and Jean Laville, Deputy CEO of SSF, prepared the online training course with four modules aimed at financial specialists with beginner's knowledge of sustainable finance. The four modules are complemented by practical case studies and cover the following topics:

- What is sustainability & what are the implications for the finance sector?
- The driving role of Asset Owners and Asset Managers in the sustainable value creation process
- Enhancing the value proposition for private banking clients through Sustainable Investment
- The Integration of Sustainability in company business models & strategy, and the implications for company analysis and valuation

The tool was introduced to members during 3 separate events in Geneva, Lugano and Zurich, respectively.

Currently the tool is available in English, however, due to demand from members, SSF is translating the tool into German and French with plans to launch these language versions in 2019.

3.2.2 SSF Training activities

SSF made active contributions to several sustainable finance courses:

- University of Zurich, Lecture in CAS Course on sustainable finance by the Center for Sustainable Finance and Private Wealth (CSP)

- ETH Zurich, Lecture on Swiss Sustainable Finance in lecture series on sustainable finance by Prof. Timo Busch
- University Zurich, Institute for Banking and Finance, Special course for Chinese delegation on sustainable finance
- Contribution and partnership agreement with HEG Geneva regarding new CAS on sustainable finance online course
- Private Hochschule Wirtschaft PHW in Bern: Lecture on sustainable finance in course sustainable economy by Prof. Markus Braun
- University of St. Gallen (HSG), Guest lecture in course on sustainable finance by Prof. Rolf Wüstenhagen on practical insights into sustainable investments.
- University of St. Gallen: Lecture on Sustainable Finance Regulation in lecture series "Socially Responsible Investments and Impact Investing" by Prof. Sebastian Utz
- Business School Lausanne, Lecture in MISF, Responsible Investing Towards Sustainability
- Master of Technologies, EPFL, Guest lecture on Responsible Investing
- HEG, Geneva, CAS in Sustainable Management, Lecture on Responsible Investing
- School for International Training / SIT Banking, Finance and Social Responsibility, Lecture on Responsible Investing

3.2.3 FOEN/SSF education project

In the report „Bericht Grüne Wirtschaft – Massnahmen des Bundes für eine ressourcenschonende, zukunftsfähige Schweiz (2016-2019“), FOEN was mandated to create an environment which supports the update of sustainability in financial education. Based on this, FOEN jointly with SSF commissioned a report providing an overview on state of sustainable finance education and recommendations to expand offering. SSF supports the project with expert know how, access to the SSF network and a financial contribution. The project included a workshop with stakeholders on the grounds of which final recommendations to key stakeholders will be made.

3.3 Sustainable investments in private wealth management

3.3.1 Workgroup renamed and restructured

At the Members' Assembly 2018, SSF members supported the suggestion to expand the scope of the former private wealth management workgroup to wealth and asset management. Under the lead of Marie-Laure Schaufelberger, Pictet Group, and Andreas Knörzner, Vontobel, SSF now launched the new workgroup "SI in Wealth and Asset Management".

The workgroup aims to promote Sustainable Investing (SI) in Swiss private wealth and asset management and further strengthen Swiss offerings in this field. The workgroup will address these objectives with a fresh lens, putting a focus on new topics and upcoming challenges.

SSF performed a call for members in late 2018 and began to work with this new workgroup in early 2019.

3.3.2 Engagement Initiative: Letter to index providers on controversial weapons exclusions

In November 2018, SSF took over a coordinating role in an investor initiative for an "Open letter to global index providers" to exclude controversial weapons from mainstream indices. Launched in August 2018, the initiative had already received the support from a core group of more than 60 Swiss investors representing over USD 2 trillion. As of 31 January 2019, the initiative had gained 141 signatories from 17 different countries representing about USD 6.7 trillion. In Q1/Q2 2019, SSF plans to engage with large index providers together with selected signatories who support the view that index providers should remove companies involved in controversial weapons from mainstream indices. More information on this engagement initiative can be found on the SSF website under [SSF Engagement Initiatives](#).

3.4 Investments for development

With the help of the workgroup Investments for Development, led by Frederic Berney from BlueOrchard, SSF organised its first international conference in January 2018 entitled "Inspiring investment partnerships to achieve global goals". The event was a response to Swiss industry actors within the SSF network calling for more insights and visibility into investment solutions designed to attract funding from the private sector that contribute to achieving global sustainability goals. With over 200 participants from the private and public sector, from 12 countries, and 6 interactive breakout sessions displaying Swiss partnerships, the event proved to be a great opportunity to exchange on the topic.

Realising that much of the event content is valuable input for the industry, SSF decided to condense the full day conference into a report, which summarises the key findings presented and discussed during the event. It highlights the status of public-private partnerships in Switzerland and beyond, and shows the need for further developments in promoting scalable solutions in impact investment. It also identifies areas for further discussions around blended finance concepts to ensure greater mobilisation of private capital. This report was published in February 2019.

Through this workgroup, SSF was also able to build up relations with important international players in the field during 2018. Convergence, for instance, is a key player in the field of blended-finance, acting as a network that generates blended finance data, intelligence and deal flow to increase private sector investment in developing countries. The SSF workgroup was honoured to host Convergence at one of their meetings during 2018, which led to the organisation of the joint event exclusively for SSF and Convergence members. This offered a great opportunity for exchange between the two networks.

Based on its members input, SSF provided feedback to IFC's consultation on their Operating Principles for Impact Management. The written input was debated at a meeting between IFC representatives and SSF members hosted by SECO in January 2019.

Finally, SSFs market study on investments for development, originally published in 2016, was used as the basis for a book chapter for the Springer publication Positive Impact Investing – A Sustainable Bridge Between Strategy, Innovation, Change and Learning. This publication is part of a larger series by Springer on Sustainable Finance topics.¹

SSF further was represented in a SECO advisory council for a call for proposals to finance technical assistance for blended finance products (SECO 17), which resulted in the support of 4 innovative partnerships.

3.5 Financing the transition to a low-carbon economy

With the energy transition set to gather momentum in the coming years, SSF intends to discuss the role of the financial sector for the transition to a low-carbon society and economy in a **special report**. With this report, we intend to show how existing and new financial instruments can provide private funding and investment, thus enabling a transformative change. For this reason, in late 2018, SSF conducted a **Call for steering committee**, in order to ensure that the publication contains a practical perspective and current developments and best practices on the issue. The steering committee members were selected in December 2018 and consist of professionals who possess know-how in the field of renewable energy finance (i.e. lending, project finance) and the energy transition in general. They will be providing guidance on the form, content, focus and outcome of the publication. The steering committee is not an SSF workgroup, but a limited, project-related body. The first meeting of the steering committee is planned for January 2019.

3.6 Sustainable cooperation with members & partners

As a member-led industry association, SSF depends on active member involvement and support to define and reach its goals. Throughout 2018, SSF utilized its resources to improve the cooperation with its members through various activities.

In a member survey, SSF asked its members to prioritise themes for events and publications and provide ideas for additional topics and activities. SSF built on this input for the planning of events and publications in 2018 and beyond.

In cooperation with Inrate, SSF prepared a second edition of its Focus series on “measuring climate related risks in investment portfolios” which was published in March 2019.

At its annual conference, SSF held an official dinner for C-Level member representatives with the objective of gaining further support from Swiss Financial Leaders for promoting sustainable finance further. Members appreciated the opportunity to involve their managers and let them debate the use of sustainable finance for the Swiss financial centre.

¹ <https://www.springer.com/series/15807>

3.7 Political dialogue

In 2018, SSF provided feedback to a variety of different consultations, including:

- The European Commission's Public consultation on institutional investors and asset managers' duties regarding sustainability
- The European Commission's Public consultation on the EC Action Plan on Sustainable Finance
- IFC's public consultation on their draft – Investing for Impact: Principles for Impact Management
- Input to the Swiss Norms Association on a proposal by the British Standards Institute (BSI) to create a new ISO Technical Committee (TC) on Sustainable Finance.

In addition, SSF also published a policy brief on the "EU action plan: Financing Sustainable Growth" to help its members understand the 10 action points and give them an indication of the potential impacts for SSF members and for the Swiss financial centre.

3.7.1 Formal dialogue with different federal authorities

SSF again took part in annual the Sustainable Finance Roundtable organised by State Secretariat for International Financial Matters (**SIF**) and brought in the view of sustainable finance actors in the Swiss financial market. Furthermore, SSF supported SIF in organising a roundtable on sustainable fintech and contributed to it with an overview on the role of fintech in improving sustainable finance. Over the course of the summer 2018 SSF was part of several workshops held by SIF to develop suggestions on sustainable finance action both by the public and the private sector. SSF was further invited to become a member of an official "Begleitgruppe" Sustainable Finance, that held its first meeting in December 2018.

3.7.2 Regular informal dialogue with different federal authorities

The State Secretariat of Economic Affairs (**SECO**) is an official network partner of SSF. SECO representatives are actively involved in the Investments for Development workgroup of SSF which guarantees a regular exchange of thoughts on this topic as well as the alignment of joint activities to promote such investments.

SSF cooperates with the Federal Office for the Environment (**FOEN**) for the education project mentioned above.

3.8 International representation and recognition

In late 2017, SSF officially took on a role as founding member and steering committee member for the FC4S Network (International Network of financial Centres for Sustainability). The FC4S Network is structured as a partnership between financial centres and the United Nations Environment Programme, which acts as its Convenor and Secretariat. The objective of the network is to exchange experience and take common action on shared priorities to accelerate the expansion of green and sustainable finance. In 2018, the network held 3 events, where SSF joined and played an active role.

- FC4S inaugural conference in Milano (April)
- FC4S conference in Shanghai (October)
- FC4S European hub launch in Ireland (November)

In addition, during 2018, SSF had visibility at international events including the following:

- Inaugural Conference of Northern European Partnership on Sustainable Finance in London (March 2018)
- SSF was partner and speaker at RFI Summit, taking place in Switzerland (May 2018)
- World Investment Forum – Investing in Sustainable Development, taking place in Geneva (October 2018)
- Climate Innovation Summit in Dublin (November 2018)
- Sustainable Finance conference organised by the Swiss Embassy in Paris (November 2018)

SSF also continued its tradition in inviting renowned keynote speakers, panellists and presenters for its events. In 2018, SSF was happy to have Philippe Le Houérou, CEO, IFC to give the keynote speech. At the official dinner, Swiss C-Level finance representatives used the opportunity to exchange thoughts on the future role of sustainable finance with this EU representative.

3.9 Involvement of institutional asset owners (IAO)

SSF's flagship product for institutional asset owners is its [Handbook on Sustainable Investments](#), now available in German, French and English. Many of the topics covered in the handbook serve as a basis for further discussions with SSF's IAO workgroup, mainly through SSF's IAO workshop series. The workshops are intended to deepen understanding of specific topics outlined in the handbook by exchanging knowledge and experience among peers in a neutral platform for discussions amongst practitioners with expert inputs.

In 2018, SSF continued the series with two further topical workshops. The first being on the topic of climate risks in portfolios and the second on impact measurement. Regionally, SSF also ran two additional workshops on the role of sustainable investments for pension funds in Geneva and Lugano.

3.10 Local workgroup Ticino

The Ticino Workgroup, led by SSF team member Alberto Stival, offers Ticino-based member representatives a network to exchange know-how and experiences in sustainable finance. In 2018 the workgroup organized one public event and two workshops for members. On 10 October, SSF organized a conference on gender equality at Villa Negroni, Vezia: Professor Paola Profeta, Bocconi University, gave an overview of current data on gender disparity in the workforce and in business in general and Mara Harvey, UBS, highlighted opportunities for the financial sector by pointing out how finance needs to increase its attention to women along the entire value chain. On 6 September, SSF presented the newly developed education tools to its members in Ticino and on 16 November a first workshop for members representing pension funds took place in Lugano.

The workgroup also gives input through the workgroup leader to a Cantonal working group focused on Corporate Social Responsibility (CSR) and meeting on a monthly basis. A continued dialogue with local business schools and associations is also carried out through the workgroup. During the year SSF had the opportunity to present its activities on several occasions in Ticino at events focusing on students (in particular at SUPSI) and a good media presence (radio, TV and newspaper) was granted, too.

4 SSF as an organisation

4.1 SSF members and network partners

At the end of 2018, SSF was supported by a total of 114 organisations (95 members and 19 network partners).

The following 15 members and 3 network partners joined SSF in 2018:

New members 2018	New network partners 2018
Berner Kantonalbank	CFA Society Switzerland
Carnot Capital AG	Haute Ecole de Gestion Genève
General Invest (Switzerland) AG	ZHAW Zurich University of Applied Sciences
Greentech Capital Advisors	
IAM Independent Asset Management SA	
Loyal Finance AG	
Maerki Baumann	
Pensionskasse EBP Schweiz AG	
Record Currency Management Limited	
Renaissance PME	
Société Générale Paris, Zurich Branch	
Tareno AG	
Union Bancaire Privé	
Yova AG	
zCapital AG	

The following 5 members and 1 network partner left the organisation by the end 2018 due to various reasons, such as mergers/acquisitions, change of regional focus, or change of strategic focus:

Leaving members 2018	Leaving network partners 2018
Baumann & Cie	Business School Lausanne
Contrast Capital	
Fondation Guilé	
Schroder Adveq Management AG	
Vietnam Holding	

SSF Members as of 31 December 2018 (95)

AlphaMundi Group Ltd.	Greentech Capital Advisors
Alternative Bank Schweiz AG	Helvetia Insurance
Amundi AM	IAM Independent Asset Management SA
APC Group SA	Inrate Ltd
AST FEE Anlagestiftung für erneuerbare Energien i.G.	Julius Baer Group Ltd
AXA Winterthur	Kieger AG
Banca Arner SA	LGT Group
Bank J. Safra Sarasin	Loyal Finance AG
Banque Bonhôte & Cie SA	Maerki Baumann & Co. AG
Banque Lombard Odier & Cie SA	MIRABAUD et Cie SA
Banque Pâris Bertrand Sturdza SA	MSCI ESG Research Inc.
Baumann & Cie	Nest Collective Foundation
Berner Kantonalbank AG	Oberson Abels
BHP - Brugger and Partners Ltd.	Obviam
BlueOrchard Finance S.A.	OLZ AG
BNP Paribas	On Finance SA
BSD Consulting (B&SD Business and Social Development GmbH)	Partners for Sustainability AG
CANDRIAM INVESTORS GROUP	Partners Group
Carnot Capital AG	Patrimonium
Cassa pensioni di Lugano	Pensionskasse EBP Schweiz AG
Concors AG	Pictet Group
CONINCO Explorers in finance SA	Prakriti Projects Ltd.
Conser Invest SA	PwC
Contrast Capital	Record Currency Management Limited
Covalence SA	Raiffeisen Switzerland
Credit Suisse AG	RAM Active Investments SA
De Pury Pictet Turrettini & Co Ltd.	Renaissance PME
E2 Management Consulting AG	RepRisk AG
EBG Investment Solutions	responsAbility Investments AG
ECOFAC AG	RobecoSAM AG
Edmond de Rothschild (Suisse) S.A.	Schroder Adveq Management AG
EFG International	Societe Generale
Eltaver AG	Suva
Ethos Foundation	Swiss Investment Fund for Emerging Markets (SIFEM)
FINANCEcontact Ltd.	Swiss Mobiliar Cooperative Company
Fondation Guilé	Swiss Philanthropy Foundation
Fondazione ticinese per il Il Pilastro	Swiss Re
Forma Futura Invest Inc.	Symbiotics SA
Fundo SA	SYZ Group
General Invest (Switzerland)	Tareno AG
GES Investment Services Switzerland GmbH	Thurgauer Kantonalbank
Globalance Bank	UBS AG

SSF Members as of 31 December 2018 (95) (continued)

Unigestion SA	Vontobel
Union Bancaire Privée	VP Bank
Valeur Fiduciaria SA	Yova AG
Van Daalen & Cie SA	zCapital AG
VELUX STIFTUNG	Zürcher Kantonalbank
Vietnam Holding Asset Management	

SSF Network Partners (19) as of 31 December 2018

Business School Lausanne
Center for Corporate Responsibility and Sustainability (CCRS)
Center for Responsibility in Finance, Department of Banking and Finance, University of Zurich
Center for Sustainable Finance and Private Wealth, Department of Banking and Finance, University of Zurich
Centro di Studi Bancari
CFA Society Switzerland
Economic Development, City of Zurich
ETH Sustainability - ETH Zürich
Geneva Finance Research Institute - University of Geneva
Global Infrastructure Basel Foundation (GIB)
Haute Ecole de Gestion Genève
Office for Economy and Labour, Canton of Zurich
State Secretariat for Economic Affairs SECO
Sustainable Finance Geneva
SVVK-ASIR
Swiss Insurance Association SIA
SwissFoundations
WWF Switzerland
ZHAW Zurich University of Applied Sciences

4.2 SSF Board

The Board is responsible for the strategy of the association and the supervision of the implementation of the SSF work program. It represents different member types as outlined in the Articles of Association.

4.2.1 Board members

By June 2018 Ladina Caduff (Raiffeisen Schweiz Genossenschaft) and Andreas Spiegel (Swiss Re) stepped down from the SSF Board due to changes in their professional roles. They were replaced by René Nicolodi (Zürcher Kantonalbank) and Pascal Zbinden (Swiss Re).

As of December 2018, the SSF Board was made up of 14 members (see table below) representing different member types and regions. Jean-Daniel Gerber is the independent President of the SSF Board.

President:



Jean-Daniel Gerber, SSF President

Board members:



Michael Baldinger, Head of Sustainable and Impact Investing, Managing Director, UBS



Eric Borremans, Head of ESG, Pictet Asset Management



Angela de Wolff, Founding Partner, Conser Invest and Co-Founder, Sustainable Finance Geneva



Roland Dominicé, CEO, Symbiotics



Patrick Fankhauser, Head Sales and Business Development, Inrate



Pierin Menzli, Head of Sustainable Investment, J. Safra Sarasin



Rochus Mommartz, CEO, ResponsAbility



René Nicolodi, Head of Equities & Themes and Deputy Head of Asset Management of Swisscanto by Zürcher Kantonalbank



Hubert Niggli, Head of Finance Department, Suva



Christine Schmid, Head Investment Solutions, Credit Suisse Switzerland



Daniel Wild, Co-CEO, RobecoSAM



Pascal Zbinden, Co-Head SAA & Markets, Swiss Re



Beatrice Zwicky, Board member and member of the investment committee, Nest Collective Foundation

SSF is very thankful to its voluntary board members in driving its mission and vision forward. Please see SSF website² for the CVs of all Board members as well as the Appendix 5.1 for the attribution to different member types, regions and gender.

4.2.2 Board activities

The Board regularly meets to discuss the strategy and activities of the association. In 2018, the Board met three times in Geneva, Zurich and Bern, respectively, and supported the SSF team with strategic guidance and feedback.




² http://www.sustainablefinance.ch/en/the-board_content---1--1061.html



4.3 SSF team



In 2018, SSF could build on the support of six team members governing the activities of the association based in three different locations - Zurich, Geneva and Lugano. The SSF CEO, Sabine Döbeli, is responsible for all activities and builds the link to the Board of the association. She is supported by Jean Laville, deputy CEO based in Geneva. Kelly Hess, Senior Project Manager based in Zurich coordinates workgroups, carries out research and manages member requests. Alberto Stival represents SSF in Ticino and coordinates all activities in the region. SSF is further supported by a 20% office manager, Marietta Caprez. Throughout 2018, SSF received valuable support by interns Anna Walker and Anja Bodenmann, respectively.

The team had a total workforce of 3.6 full time equivalents in 2018 (equal to the 3.6 FTEs during 2017).

SSF team:

		
Sabine Döbeli, CEO	Jean Laville, Deputy CEO	Kelly Hess, Senior Project Manager

	
Alberto Stival, Representative Ticino	Marietta Caprez, Office Manager

	
Anna Walker, Intern	Anja Bodenmann, Intern

5 Appendix

5.1 List of Board members by member type, region and gender

Table 1: List of Board members by member type

Current Board members	Company	Member Type									
		Global Bank	Bank	General AM and PE manager	Specialised Asset Manager	Service Provider	Insurance Company	Pension Fund and other Asset Owner	Foundation and Family Office	Sustainable Finance Geneva	Independent
Jean-Daniel Gerber	SSF President										
Michael Baldinger	UBS										
Eric Borremans	Pictet										
Angela de Wolff	SFG, Conser										
Roland Dominicé	Symbiotics										
Patrick Fankhauser	Inrate										
Pierin Menzli	J. Safra Sarasin										
Rochus Mommartz	responsAbility										
René Nicolodi	ZKB										
Hubert Niggli	Suva										
Christine Schmid	Credit Suisse										
Daniel Wild	RobecoSAM										
Pascal Zbinden	Swiss Re										
Beatrice Zwicky	Nest Collective Foundation										
Sub-Total		2	3	1	2	1	1	2	0	1	1
Total		14									

Table 2: List of Board members by region and gender

Current Board members	Company	Region			Gender	
		Swiss German	Swiss Romand	Swiss Italian	Male	Female
Jean-Daniel Gerber	SSF President					
Michael Baldinger	UBS					
Eric Borremans	Pictet					
Angela de Wolff	SFG, Conser					
Roland Dominicé	Symbiotics					
Patrick Fankhauser	Inrate					
Pierin Menzli	J. Safra Sarasin					
Rochus Mommartz	responsAbility					
René Nicolodi	ZKB					
Hubert Niggli	Suva					
Christine Schmid	Credit Suisse					
Daniel Wild	RobecoSAM					
Pascal Zbinden	Swiss Re					
Beatrice Zwicky	Nest Collective Foundation					
Sub-Total		11	3	0	11	3
Total		14				

5.2 Glossary

ASIP	Swiss Pension Fund Association
CAS	Certificate of Advanced Studies
CFA	Chartered Financial Analyst
DAS	Diploma of Advanced Studies
ESG	Environmental, Social, Governance
FNG	Forum Nachhaltige Geldanlagen
FOEN	Federal Office for the Environment
FTE	Full time equivalent
GSFG	Green Finance Study Group
HLPF	High Level Political Forum
IfD	Investments for Development
MOOC	Massive open online course
RI	Responsible Investments
SDC	Swiss Agency for Development and Cooperation
SECO	State Secretariat of Economic Affairs
SFG	Sustainable Finance Geneva
SIA	Swiss Insurance Association
SIF	State Secretariat of International Financial Matters
SSF	Swiss Sustainable Finance
SVVK	Schweizer Verein für verantwortungsvolle Kapitalanlagen
UNGC	United Nations Global Compact
USP	Unique Selling Proposition

Swiss Sustainable Finance (SSF) strengthens the position of Switzerland in the global marketplace for sustainable finance by informing, educating and catalysing growth. The association, founded in 2014, has representation in Zurich, Geneva and Lugano. Currently SSF unites over 110 members and network partners from financial service providers, investors, universities and business schools, public sector entities and other interested organisations.

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Grossmünsterplatz 6 | 8001 Zürich | Tel. +41 44 515 60 50
www.sustainablefinance.ch

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