

An aerial photograph of a lush green valley with a winding road. The road is overlaid with numerous colorful, glowing light trails in shades of blue, green, yellow, and red, creating a sense of motion and connectivity. The background shows a dense forest of trees and some buildings on a hillside under a hazy sky.

# PRI STRATEGY PLAN

2024-27

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# INTRODUCTION FROM THE CHAIR AND CEO



Conor Kehoe  
Chair, PRI Board



David Atkin  
CEO, PRI

As we celebrate the launch of the PRI's new strategy, we reflect on our nearly 20-year journey with signatories that has brought us here and our vision for the future of responsible investment (RI).

Our mission remains steadfast; we believe that an economically efficient, sustainable global financial system is a necessity for long-term value creation, and our approach should continue to be both signatory-centric and centred around our six Principles. We are aiming to advance responsible investment globally through our visionary outlook and to support signatories to employ responsible investment strategies, aligned with their individual investment goals, objectives and fiduciary responsibilities.

## Nearly 20 years of progress

At the PRI over the past two decades, we have worked side-by-side with investors and other market actors to help build a thriving global responsible investment ecosystem. Together, we have achieved:

- **A global RI community:** responsible investment strategies now cover 50% of managed capital globally.
- **Integrated sustainability practices:** investors have adopted a range of sustainability practices to improve returns, achieve responsible investment objectives and reduce risks.

- **Corporate adoption:** investor stewardship has led to widespread corporate integration of material environmental, social and governance (ESG) issues into their business strategies, risk management and reporting.
- **Sustainability reform in financial markets:** sustainability reporting for corporations and investment funds is now mandated or imminent in major economies, ensuring well informed markets, where comparable and consistent material information is available at scale.

## Reflection and codesign

The launch of our new strategy was preceded by more than 18 months of listening, reflection and global consultation to ensure a deep understanding of the perspectives and needs of our signatories and to take stock of the rapidly developing environment around us.

Through the consultation process we heard that signatories want PRI to retain a 'big tent' approach but recognise that our signatories' interpretations of responsible investment vary based on their mandates and geography, amongst other factors. Within this 'big tent', the PRI needs to support progress in ways that acknowledge our diverse signatory base.

It was also clear from the responses that signatories are expecting our new strategy to lead to invitations to join new collaborations; they value peer comparison and benchmarking, are eager to

see Progression Pathways move from concept to implementation and to ensure that the PRI's policy work supports responsible investment reforms in transitioning economies and responds to their needs. We are confident that PRI's new strategy will indeed support signatory work and value creation, drive the next phase of global responsible investment and deliver our own operational excellence.

## THE NEXT THREE YEARS — OUR NEW STRATEGY AND IMPACT

The strategy plan will focus on four key areas:

- 1 Driving signatory progression on responsible investment while streamlining PRI mandatory reporting
- 2 Strengthening regional RI ecosystems in both mature markets and emerging and developing economies
- 3 Amplifying signatory impact by supporting and leading collaborative initiatives
- 4 Strengthening the enabling environment for RI by influencing government and multilateral policy and financial market practices

We will monitor our progress annually through a set of organisational KPIs that we aim to achieve over the next three years. This will be complemented by a wider analysis of system indicators and in turn, mission reference points to also take stock of the changes in the global financial system that we contribute to and enable better outcomes for all beneficiaries and clients.

### Delivering the future of RI together

We are confident that our work over the past few years has set us up for success both in delivering our mission and supporting our signatories around the world. However, we know that further challenges lay ahead for our industry – some present, some emerging and others yet unknown. This includes continuing to see climate change and the degradation of our natural environment as growing material risks, an increasing inequality of economic outcomes as well as social and political instability worldwide.

We also know that at this inflection point for responsible investment, many signatories and stakeholders are feeling frustrated and fatigued. However, there is reason for optimism if we continue to collaborate. We go further when we travel together, and the PRI's new strategy will help us to maintain momentum in a new and challenging era. So today, it is with great enthusiasm that we invite all our signatories and stakeholders to take the next step in this important journey with us.

# OUR MISSION

**We believe that an economically efficient, sustainable global financial system is a necessity for long-term value creation.**

Such a system will reward long-term, responsible investment and benefit the environment and society as a whole. At the PRI, we will work to achieve this sustainable global financial system by encouraging adoption of our Principles and collaboration on their implementation, by fostering good governance, integrity and accountability and by addressing obstacles to a sustainable financial system that lie within market practices, structures and regulation.

## THE 6 PRINCIPLES



- 1 We will incorporate ESG issues into investment analysis and decision-making processes.
- 2 We will be active owners and incorporate ESG issues into our ownership policies and practices.
- 3 We will seek appropriate disclosure on ESG issues by the entities in which we invest.
- 4 We will promote acceptance and implementation of the Principles within the investment industry.
- 5 We will work together to enhance our effectiveness in implementing the Principles.
- 6 We will each report on our activities and progress towards implementing the Principles.

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# DELIVERING THE MISSION

The new strategy has two overarching objectives: to maximise the value we deliver to signatories in a rapidly evolving responsible investment environment, and to support signatories to play a meaningful role in achieving a sustainable global financial system.

These objectives reflect our belief that the PRI, as the world's largest and most influential responsible investment organisation, must not act alone. We must work with signatories, as well as other networks, financial system actors, policy makers, multilateral organisations and other relevant stakeholders, to ultimately create a financial system that rewards long-term, responsible investment.

# CREATING VALUE FOR SIGNATORIES

The PRI was founded by investors for investors. We have global reach, the breadth of experience of operating in different regulatory environments and the depth of market knowledge to help investors advance their responsible investment practices.

Our six Principles offer a menu of possible actions for incorporating ESG issues. We help signatories strategically and purposefully through a range of integrated approaches:

- We provide guidance, education and resources to help signatories implement the Principles effectively and progress their responsible investment practices.
- We support signatories with reporting, so they can benchmark their execution and continue to make progress.
- We engage with policy makers and regulators to advocate for policies that support sustainable financial systems and responsible investment practices.
- We invite signatories to join collaborations with peers, share ideas and address RI challenges.
- We have the right people on the ground in key regions to partner with regional and specialist RI organisations to amplify relevant work globally.
- We are developing a new way for signatories to progress. Progression pathways will provide support, guidance and resources to help signatories at various stages of their RI journey to develop their responsible investment practices in line with their individual investment objectives, mandates and regulatory context.

## Signatory participation opportunities



We will continue to work with signatories to deliver our mission. Our four strategy focus areas below set out how we are planning to provide the tools and services signatories can use to deliver on their own ambitions both locally and globally, and how we will work to deliver the critical next steps in PRI's mission. Together with signatories, we can ensure that RI continues to support long-term value creation, well-functioning markets and sustainable outcomes.

However, it is important to note that this document sets out our Strategy Plan, which has been prepared with signatory input but does not necessarily represent the views of PRI signatories, either individually or as a whole. The Strategy Plan is not binding on PRI signatories, nor does it seek to limit or conflict with their duties as independent fiduciaries. We encourage signatories to continue to set their own, independent RI strategies, in line with their duty to act in the best long-term interests of their beneficiaries and clients.

# STRATEGY FOCUS AREAS





# 01. DRIVING SIGNATORY PROGRESSION

## Driving signatory progression on RI while streamlining PRI mandatory reporting

Driving and supporting signatories to meaningfully progress implementation of our six Principles is central to our work and mission. However, as the global RI ecosystem grows, responsible investors are becoming increasingly diverse in their RI objectives and maturity levels.

To account for this diversity, following a co-design process with signatories, in 2025 we will introduce a new way for signatories to progress their RI approaches. Progression Pathways will provide support, guidance and resources to help signatories at various stages of their RI journey to develop their responsible investment practices in line with their individual responsible investment objectives, mandates and regulatory context – as well as, in time, enabling meaningful benchmarking against peers. You can read more about progression pathways [here](#).

A streamlined reporting and assessment process will better enable signatories to show how they implement the six Principles. Over the next three years, steps will be taken to recognise equivalent reporting frameworks across jurisdictions and organisations in our approach. This will involve identifying existing reporting obligations our signatories are subject to and using these to inform our approach to PRI reporting and assessment and Progression Pathways.

Progression Pathways will allow signatories to advance their RI practices in ways that are relevant and meaningful to their beneficiaries, their clients, and their organisation, while streamlined reporting will reduce effort, allowing signatories to redirect resources towards progression.

## OBJECTIVES

Support signatories to progress their RI objectives by introducing progression pathways that recognise the diversity of RI objectives and business models among signatories and across regions and regulatory frameworks.

Build signatories' capacity to progress their RI practices by enhancing tailored PRI support, guidance and resources.

Preserve accountability in relation to the six Principles while reducing PRI reporting effort required of signatories by streamlining the reporting and assessment process.

## ORGANISATIONAL TARGETS 2024-27

50% of signatory AUM participation in one or more pathways.

At least 1/3 of signatory AUM participation in a pathway incorporating ESG factors and a pathway seeking to address drivers of sustainability-related financial risks.

# O2. STRENGTHENING REGIONAL RESPONSIBLE INVESTMENT ECOSYSTEMS

## Strengthening regional ecosystems in both mature markets and emerging and developing economies

Action towards a sustainable financial system requires work at both the global and regional levels. Our work in regions will support signatory progression and create spaces for signatories who wish to do so to act, influence system change and engage effectively with markets at a regional level. To better serve signatories' needs, we will continue to work closely with signatories, while also working to build a thriving responsible investment ecosystem in markets around the world.

We will continue to leverage our global position, expertise and network to support and foster regional RI ecosystems by: (1) providing signatories and stakeholders with the opportunity to convene through communities of practice, both locally within ecosystems and across ecosystems; (2) supporting signatories in their RI progression by connecting them with peers, resources and advice; and (3) supporting meaningful policy outreach within ecosystems. We will have the right people on the ground in key regions to work with signatories within and across their ecosystems, providing greater opportunities for sharing best practice, collaborative action and support to progress their responsible investment practices.

Where appropriate, we will also invite network partners such as local SIFs and other associations to collaborate with the PRI, reducing duplication of effort and amplifying each other's work.

Another key development will be to strategically increase our presence and improve the relevance of our work in emerging markets. We are taking these steps in response to the growing importance, now and in the future, of emerging markets to sustainability priorities and system-wide risks. We will support responsible investment in emerging markets, acting as a communications bridge between investors in these markets and

those in developed markets. Whilst we already work with over 640 emerging market signatories, spanning 46 countries with around US\$12.4 trillion in AUM, increasing our work in these regions will enhance our collective understanding of global investor challenges and provide avenues for more collaborative and productive action towards a sustainable global financial system. We will focus particularly on Southeast Asia, Latin America, Sub-Saharan Africa, the Middle East and India.

Signatories will experience enhanced connectivity and opportunities to collaborate across the wider network to promote best practice and provide learning opportunities, and there will be greater focus on regional impact.

### OBJECTIVES

Continue to mainstream and accelerate RI progress by supporting and fostering regional RI ecosystems.

Increase our presence in emerging markets to bring them along on the global transition to a sustainable financial system, while maintaining support in mature RI ecosystems.

Partner with regional and specialists RI organisations to highlight work that is relevant for signatories globally.

### ORGANISATIONAL TARGETS 2024-27

Grow the signatory base by an additional US\$10-\$20tn in AUM.

# 03. SUPPORTING AND LEADING COLLABORATIVE INITIATIVES

## Amplifying signatory impact by supporting and leading collaborative initiatives

Providing signatories and stakeholders with opportunities to collaborate, consistent with investors' duties and mandates, plays a crucial role in changing financial markets, mainstreaming RI and influencing the behaviour of investees.

In line with strong demand from signatories, we will continue to invite signatories to collaborations. This includes through PRI-led and supported stewardship, target setting and peer learning investor initiatives and through the PRI Collaboration Platform which provides a unique forum for investors to connect and collaborate to enhance their influence on ESG issues. We will further amplify these opportunities and their impact by growing the number of entities engaged by PRI signatories through our PRI-led stewardship initiatives. We will continue to focus on climate change, human rights, responsible labour practices and nature as our priority ESG issues, and the leading initiatives in these areas will inform and be informed by PRI research, analysis, thought leadership and policy advancement.

Participation in collaborative initiatives creates opportunities for signatories to protect and enhance overall long-term value for clients and beneficiaries, address systemic issues, demonstrate commitment and progress, learn from other responsible investors and engage collaboratively with investees, policy makers and other stakeholders. They also provide the opportunity for advanced signatories to explore, establish and drive progress through collaboration.

Signatories will have opportunities to collaborate through established and new, PRI-led and PRI-supported initiatives including:

- [Net-Zero Asset Owner Alliance](#)
- [Net Zero Asset Managers Initiative](#)
- [Net Zero Investment Consultants Initiative](#)

- [Net Zero Financial Service Providers Alliance](#)
- [Initiative Climat International \(iCI\)](#)
- [Climate Engagement Canada \(CEC\)](#)
- [China Climate Engagement Initiative \(CCEI\)](#)
- [Climate Action 100+](#)
- [Collaborative Sovereign Engagement on Climate Change Advance](#), and [Spring](#).

## OBJECTIVES

Amplify signatory impact by providing opportunities for collaboration through PRI-led and co-led initiatives.

Support signatories to navigate investor initiatives and collaboration opportunities.

Support signatories to engage companies/ issuers on their sustainability performance in order to mitigate financial risk and to maximise long-term value creation, to inform signatories' independent decision-making on capital deployment and to encourage pro-competitive market practices.

## ORGANISATIONAL TARGETS 2024-27

Maintain signatory AUM engaged in individual PRI-led, co-led or supported initiatives (aggregated across all relevant initiatives).

Maintain number of signatories engaged in PRI-led or co-led initiatives, PRI-supported initiatives and using Collaboration platform.

Grow the number of entities engaged by PRI signatories through our PRI-led stewardship initiatives.

Investors are independent fiduciaries responsible for their own investment and voting decisions and must always act independently in setting strategies, policies and practices, in keeping with all applicable laws, including their fiduciary and/or investor duties. Each individual signatory makes their own independent decision regarding ongoing participation in PRI-led or supported initiatives

# 04. STRENGTHENING THE ENABLING ENVIRONMENT

## Strengthening the enabling environment for RI by influencing government and multilateral policy and financial market practices

All investors benefit from an enabling responsible investment policy and regulatory environment. While the global RI ecosystem has matured rapidly over the past decade, policy and financial market reform is still needed to reward leading RI practices. Signatories have identified this as a priority area for RI action.

At the PRI we are well placed to progress reform due to our global experience and the technical advice we can provide to policy makers and signatories engaging in policy dialogue on responsible investment. We will support and lead the system-wide change which is essential for both new and advanced responsible investors to achieve their RI goals. We will make policy contributions, in sync with signatories and recognising that different markets have different priorities, to promote long-term value creation in line with our Principles and our mission.

To this end, we will work closely with signatories on key policy and regulatory developments. We will use our experience with signatories to inform our work with policy makers, regulators and other system actors to create transparent markets and align policies, regulatory frameworks and market structures with sustainability outcomes. We will also deliver thought leadership to drive system change and support the signatory offering – including ESG issues expertise, progression pathways and global policy engagement.

We will also support signatory engagement to influence government and multilateral policy making including financial regulation and economic policy, forums and initiatives such as UNFCCC, OECD and ISSB. This work provides different engagement mechanisms for signatories, from PRI-led discussion papers and statements through to statements that enable like-minded signatories to speak in their own names.

## OBJECTIVES

Harmonise and progress RI policies and practices across jurisdictions by engaging policy makers and financial system actors.

Support signatories to meaningfully contribute on key RI policy and regulatory developments.

## ORGANISATIONAL TARGETS 2024-27

Policy positions and influential relationships are established with policy makers and regulators in 15 priority markets.

More than 50% of signatories actively support sustainable financial policy reform in their RI ecosystems by 2027.

# STRATEGY ENABLERS

## PEOPLE AND OPERATIONS

To achieve our strategy, we will need to operate as a high-performing organisation of employees who are engaged at work, motivated to do their best and enabled to do their job through an inclusive culture, supported by systems and operational processes, procedures, policies and expertise.

We will continue to build the organisation of the future by embedding good leadership practices, enhancing culture and mindsets, continuing implementation of our new operating model and building capabilities (skills and expertise) to deliver the strategy.

We will also improve our risk management and operational efficiency, investing in the systems and resources required to maintain a sustainable, operational model for the PRI, equipped to meet future challenges and deliver Progression Pathways for signatories.

We will continue to increase the geographical spread of our people, to ensure our organisation reflects the diversity of our signatories and brings our people ever closer to signatories in their markets. In addition to local RI managers, we have recruited our first US-based Executive Team member, expanded our signatory support services into local regions and introduced local policy and stewardship initiatives roles. Over the next 3 years we will look for further opportunities to place our people in regional markets.

## LONG-TERM FUNDING

The funding we receive to support signatories is predominantly derived from signatory fees. We will continue to strive to keep our fees as low as possible while delivering our strategy and creating value for signatories. Our last significant adjustment to fees beyond inflation was nearly 10 years ago. Since then, we have expanded our operations to better meet the needs of a rapidly changing and fast-maturing RI landscape, while also making some major operational changes to

streamline the organisation to better deliver value for a signatory base that nearly doubled since 2019.

In 2024, we introduced a modest increase in fees for most signatories and after consultation, introduced higher fee bands for our largest asset owners and investment managers. This will enable investment in the medium-to-long term to deliver the strategy. It also ensures signatories fees are more equally distributed across the diverse signatory base and are proportionate to signatory size. In 2025, asset owner and investment manager signatory fees will not increase beyond inflation levels.

Changes in the operating environment mean that we must now consider how best to enable future financial sustainability while delivering the most value for signatories. To maximise our impact and make the best use of signatory fees, we are also beginning to think about our broader funding model. This includes a review of peer organisation funding models (noting the PRI's current fees sit at the middle level of the cohort reviewed) and reviewing our income from grants, investor education, events, partnering and other services.

As a signatory-based organisation, signatory input on this path will be critical to shaping our operating model and delivering on our shared objectives. We will continue to engage with signatories through a variety of forums on our future funding model.

## STRATEGIC RISKS

During development of this strategy, we have reviewed the risks that may impact the strategy. We have considered the strategic, regulatory and legal, operational, technological, financial and people risks that are most critical for our organisation. The Board will oversee and monitor the PRI's risks to ensure that appropriate controls and mitigation measures are in place across the organisation. Risks will also be assessed as part of the annual strategy review.

# MONITORING PROGRESS

## How we will monitor the strategy and its contribution to the mission

To monitor the strategy, we will track our performance against organisational targets as well as tracking progress in the financial system and economy towards achieving the mission. We have identified PRI targets, indicators and reference points at three levels:

- **PRI organisational targets** – the results of PRI activities that contribute to the mission and support signatories in their RI activities

The purpose of the organisational targets is to measure the effectiveness of our activities. Targets are set in areas where the PRI and our signatories can have the greatest influence on responsible investment practice, aligned with the PRI mission.

- **System indicators** – changes to the global financial system that the PRI and other actors contribute toward, which address system risks, ultimately improving outcomes for beneficiaries and clients.

- **Mission reference points** – the changes in the world that enable better outcomes for all beneficiaries and clients.

The system indicators and mission reference points are the relevant factors we intend to monitor but may need to be adjusted depending on the availability of relevant and accurate data. The purpose of the system indicators and mission reference points are to understand how our activities contribute to achieving a sustainable financial system and enable better outcomes for all the clients and beneficiaries of our signatories. They provide a feedback loop on whether progress is being made on the PRI mission. We know that changes in the financial system are only partially and often indirectly attributable to the PRI's activities. Achieving success is dependent upon a broad array of actors including signatories (who will have their own, independent goals), other responsible investment and sustainability networks, financial system actors, policy makers and multilateral organisations.

Table 1: PRI organisational targets, system indicators and mission reference points

*Organisational targets - The direct results of the PRI's activities which contribute to system outcomes and impact*

### INDICATORS AND TARGETS

1. Signatory progression	50% of AUM participates in one or more pathways* At least 1/3 of AUM participates in each of A and B
2. Mainstreaming RI	Grow the signatory base by an additional US\$10-\$20Tn in AUM

<b>3. Supporting collaboration</b>	<ul style="list-style-type: none"> <li>• Maintain signatory AUM engaged in individual PRI-led, co-led or supported initiatives (aggregated across all relevant initiatives)</li> <li>• Maintain number of signatories engaged in PRI-led or co-led initiatives, PRI-supported initiatives and using Collaboration Platform</li> <li>• Grow the number of entities engaged by PRI signatories through our PRI-led stewardship initiatives</li> </ul>
<b>4. Influencing policy and market change</b>	Policy positions and influential relationships are established with policy makers and regulators in 15 priority markets
<b>5. Supporting advocacy and engagement</b>	More than 50% of signatories actively support sustainable financial policy reform in their RI ecosystems by 2027
<b>6. Signatory value</b>	More than 80% signatories are satisfied or highly satisfied with the PRI's offering

*System indicators - Not solely the result of PRI activities, dependent on the work of the PRI and other actors*

### INDICATORS

<b>1. Influencing capital deployment and market practices</b>	<ul style="list-style-type: none"> <li>• Flows towards climate financing</li> <li>• Flows towards biodiversity financing</li> <li>• Number of investors committed to initiatives on climate, nature and human rights/SDGs</li> <li>• Improving performance of companies with largest impact on climate, nature and human rights</li> </ul>
<b>2. Enabling environment for RI</b>	<ul style="list-style-type: none"> <li>• Scorecard assessing the coverage of policy, regulation and standards enabling responsible investment and sustainability outcomes, reflecting the legal and market context of priority markets</li> <li>• Number of financial actors aligned on intent and best practices towards achieving global sustainability goals, whilst maintaining independence</li> </ul>

*Mission reference points - Not directly linked to PRI activities and accountability, but the end-results of ours and others' actions*

### INDICATORS

<b>1. Maintenance of planetary boundaries</b>	Rates of change in the nine planetary boundaries
<b>2. Sustainable development and respect for human rights</b>	Progress on 169 targets (of which 138 are 'assessable') across 17 SDGs
<b>3. Achieving more equitable societies</b>	Inequality within and between countries

## The Principles for Responsible Investment (PRI) Initiative

The PRI works with its international network of signatories to put the six Principles for Responsible Investment into practice. Its goals are to understand the investment implications of environmental, social and governance (ESG) issues and to support signatories in integrating these issues into investment and ownership decisions. The PRI acts in the long-term interests of its signatories, of the financial markets and economies in which they operate and ultimately of the environment and society as a whole.

The six Principles for Responsible Investment are a voluntary and aspirational set of investment principles that offer a menu of possible actions for incorporating ESG issues into investment practice. The Principles were developed by investors, for investors. In implementing them, signatories contribute to developing a more sustainable global financial system.

**More information: [www.unpri.org](http://www.unpri.org)**

## The PRI is an investor initiative in partnership with **UNEP Finance Initiative** and the **UN Global Compact**.



### United Nations Environment Programme Finance Initiative (UNEP FI)

UNEP FI is a unique partnership between the United Nations Environment Programme (UNEP) and the global financial sector. UNEP FI works closely with over 200 financial institutions that are signatories to the UNEP FI Statement on Sustainable Development, and a range of partner organisations, to develop and promote linkages between sustainability and financial performance. Through peer-to-peer networks, research and training, UNEP FI carries out its mission to identify, promote, and realise the adoption of best environmental and sustainability practice at all levels of financial institution operations.

**More information: [www.unepfi.org](http://www.unepfi.org)**



### UN Global Compact

The United Nations Global Compact is a call to companies everywhere to align their operations and strategies with ten universally accepted principles in the areas of human rights, labour, environment and anti-corruption, and to take action in support of UN goals and issues embodied in the Sustainable Development Goals. The UN Global Compact is a leadership platform for the development, implementation and disclosure of responsible corporate practices. Launched in 2000, it is the largest corporate sustainability initiative in the world, with more than 8,800 companies and 4,000 non-business signatories based in over 160 countries, and more than 80 Local Networks.

**More information: [www.unglobalcompact.org](http://www.unglobalcompact.org)**