



PEAR Partnership Ltd
Sempar
Lymedale Business Centre
Hooters Hill Road
Newcastle-under-Lyme
Staffs. ST5 9QF
United Kingdom

People + Ecology + Action = Resilience

IMPACT INVESTMENT AND IMPACT INVESTMENT GROUPS

- **Impact investors** and impact funds look for a combined spread of **financial, environmental and social** return on their investments (ROIs).
- **Impact Investment Groups** and impact investment related groups include:
 - **Infrastructure and development platform** (global) for projects with both financial and environmental and/or social ROIs;
 - **Impact investors** (individuals and groups) and impact investment funds;
 - **Family offices** with or developing impact return requirements within their portfolios;
 - **Foundations** that are allocating investments for impact ROIs in addition to their traditional grant funding programs;
 - **Engineering, design, procurement, development, and construction (EPC) firms** with existing Environmental, Social & Governance (ESG) frameworks and practices; and,
 - **Technology** and other **solution providers** with existing ESG frameworks and practices.
- **Areas of Interest for Family Offices and Impact Funds**

Based on previous and ongoing evaluative work with impact investors, family offices with impact return requirements, and with communities, an initial group of project areas, and learning, has emerged. These are:

- **Municipal Projects of Interest**
- **Mixed-use development projects** with financial, environmental, and social impact returns.
- **Traditional** (built environment) **and civic** (social, education, health, and cultural) **infrastructure** projects such as:
 - Water, wastewater, green infrastructure, water transportation, IOT 'smart' water
 - Alternative energy production, distribution, and energy storage systems
 - Digital evidence civic management systems
 - Data-driven public safety (smart emergency management, policing, and fire protection)

- Sustainable urban planning (including digital integrated 'smart cities' platforms for data-driven planning and digital equity)
- Intelligent transportation (including 'smart parking,' intelligent traffic for management and emergencies, and autonomous vehicles).

Family offices & other impact investors see opportunities in municipal projects that:

1. Drive efficiencies.
2. Reduce costs.
3. Foster environmental and social resilience, equity, and citizen participation across social, financial, ethnic, and gender areas ('inclusion').
4. Capture quantifiable and comparable data and measurements, for data-driven decision making.
5. Offer a portfolio system of projects:
 - a. Vertical - complementary portfolio of projects within one community; and
 - b. Horizontal – portfolio across communities (microgrids or water projects, etc.).

○ **Non-Municipal Areas of Investment Interest**

Technology and project areas of interest for family offices with impact return requirements include:

1. **Sustainable agriculture**, food, and forestry with special interest in:
 - 'Smart water' and water efficiencies
 - Food production and security (physical and social)
2. **Health**
 - Innovation in cancer treatment and related breakthrough technology and treatments
3. **Big data, machine learning, and AI**
 - Growing interest also in ethics frameworks around AI and machine learning
4. Non-traditional (beyond solar and wind) **alternative energy production** with low environmental impact
 - Plasma
5. **Carbon capture** and sequestration
6. **Energy storage**

The PEAR Partnership team works with US and global impact investors and family trusts. We offer project portfolio placement, project development and oversight, programme monitoring and impact evaluation. We do not offer investment advice.

Contact:

e: info@pearpartnership.com