SFDR Trainer

Request for Proposal

1 Introduction

1.1 Context

Accelerating Impact Finance Luxembourg SARL-SIS (hereafter referred to as "**Accelerating Impact**" or the "**Company**") seeks to advance impact finance by empowering the impact finance leaders of tomorrow, and does this through the implementation of its accelerator programmes, the International Climate Finance Accelerator (the "**ICFA**") and the International Social Finance Accelerator (the "**ISFA**"). Both accelerators are unique multi-year programmes that support emerging fund managers who specialise in impact finance, thereby increasing the number of impact finance funds and the assets invested in impact. Accelerating Impact fund managers receive access to a range of technical and financial support, including trainings on a wide range of topics.

1.2 Objective

Accelerating Impact is currently requesting proposals from training providers to deliver a highly practical, applied training module for our emerging impact fund managers, focusing on practical implementation of the Sustainable Finance Disclosure Regulation (SFDR), fundraising readiness, governance and reporting, and global regulatory alignment.

The training should equip fund managers with the knowledge, tools and implementation roadmaps to:

- Understand the SFDR, its objectives, scope, and implications for institutional fund managers
- Assess when and how SFDR applies to their fund structures, fundraising activities, and investor base, including for non-EU managers seeking European institutional capital;
- Structure and position investment funds in line with SFDR requirements and institutional investor expectations, including the practical implications of Articles 6, 8, and 9;
- Establish proportionate ESG and sustainability governance frameworks that integrate sustainability considerations throughout the investment lifecycle;
- Develop robust sustainability policies, ESG due diligence processes, and portfolio monitoring systems that support institutional fundraising;

- Understand Principal Adverse Impacts (PAIs), sustainability risks, and ESG data collection approaches appropriate to emerging fund managers;
- Produce credible sustainability disclosures, respond effectively to ESG/sustainability due diligence questionnaires, and meet the reporting expectations of institutional investors and development finance institutions;
- Increase awareness of greenwashing risks and equip fund managers to make credible, evidence-based sustainability claims supported by appropriate governance and documentation.
- Understand existing EU legislative frameworks and how they align with adjacent global sustainability frameworks and standards, including IFRS Sustainability Disclosure Standards, the Principles for Responsible Investment (PRI), the Operating Principles for Impact Management (OPIM), the Global Impact Investing Network (GIIN) IRIS+ system, the Greenhouse Gas Protocol (GHG Protocol), the Partnership for Carbon Accounting Financials (PCAF), and the Taskforce on Nature-related Financial Disclosures (TNFD), where relevant.

The training should be grounded in real-world application, using practical tools, case studies, and hands-on exercises relevant to early-stage fund managers primarily (but not exclusively) operating in developing and emerging markets. It should support managers in taking action with imperfect information, provide templates or reference tools for sustainability reporting, and address common pitfalls in navigating SFDR for small and early-stage funds.

2 SCOPE OF WORK

The selected provider will be expected to:

1. Design and deliver a training module between one and three hours (to be determined based on the trainer's proposal) that will be recorded and made available on Accelerating Impact's Knowledge Hub, including:
    - An engaging presentation with practical examples
    - A demonstration of reporting requirements and tools
    - Breakout case studies (optional)
    - Supplementary materials (slides, tools, reading list) (optional)
2. Cover the following core topics (non-exhaustive):
    - Overview of SFDR requirements, evolving regulatory landscape, reporting challenges, and implications for emerging fund managers
    - Applicability to non-EU managers, fundraising considerations, and alignment with international LP expectations

- Fund classification (i.e., Articles 6, 8, and 9) and positioning, including common approaches and pitfalls
- ESG/sustainability governance and integration throughout the investment lifecycle
- Designing practical ESG/sustainability screening, due diligence, data collection, and monitoring approaches suitable for early-stage institutional funds
- Sustainability disclosures, LP reporting, and greenwashing prevention
- Connecting SFDR with broader sustainable finance classifications/frameworks including the EU Taxonomy, IFRS S2, PRI, OPIM, IRIS+, GHG Protocol, PCAF, and TNFD where relevant

3. Provide practical tools/templates, this may be in the form of the following or in any other format as proposed by the trainer:
    - SFDR Readiness Assessment Checklist
    - ESG/sustainability Integration Toolkit
    - LP ESG/sustainability Reporting Template
    - Resources on SFDR and relevant sustainability frameworks and databases
4. Tailor examples and delivery to early-stage fund managers with:
    - Limited internal resources
    - Diverse sectoral and geographic portfolios
    - Need to report to multiple stakeholders

3 EXPECTED DELIVERABLES

The selected trainer will be required to travel to Luxembourg to record the training session, and the recording equipment, staff, and editing will all be handled by Accelerating Impact. In addition, the trainer is expected to deliver:

- A summary slide deck for participants
- A curated list of tools, templates, and resources

4 PROFILES OF QUALIFIED APPLICATION REVIEWERS

The selected trainer (individual or team) should demonstrate a strong combination of technical expertise, practical experience, and training ability. Specifically, the ideal profile includes:

Essential Qualifications

- Proven expertise in SFDR and sustainable finance regulations, with practical experience advising investment funds
- Strong understanding of ESG integration, sustainability governance, and institutional investor expectations
- Experience working with private equity, venture capital, impact, climate, or emerging fund managers
- Proven ability to translate regulatory requirements into practical tools, processes, and fund management practices
- Strong knowledge of global sustainability frameworks relevant to fund managers beyond SFDR and familiarity with emerging market contexts

Preferred Qualifications

- Experience supporting early-stage or small fund managers, particularly those working in impact investing or blended finance
- Understanding of DFI, EU, and institutional investor expectations and sustainability requirements
- Familiarity with climate, nature, and impact investing frameworks, including GHG accounting, PCAF, TNFD, IRIS+, and OPIM
- Ability to translate technical content into clear, actionable steps for non-specialist audiences
- Prior delivery of interactive, adult-learning-based training, including group work and hands-on exercises
- Understanding of sustainability requirements across both EU and non-EU fund domiciles

Language and Delivery Skills

- Excellent communication skills in English (verbal and written)
- Comfort facilitating virtual sessions and with video recording
- Ability to create and share training materials, tools, and templates that participants can use beyond the session

5 TIMELINE

- RfP Launch Date: 24 July 2026
- Deadline for Proposals: 16 August 2026
- Selection of Provider: 21 September 2026
- Delivery of Training: [Q3 2026]

6 PROPOSAL REQUIREMENTS

Interested providers should submit a proposal including the following:

- Brief description of your organisation/team and relevant expertise in SFDR, training, and climate finance
- Proposed approach and methodology for delivering the training
- Proposed training content/agenda
- Experience working with early-stage or impact fund managers, particularly in emerging markets
- Estimated budget, including fees and any anticipated expenses
- References or case examples of similar trainings conducted

7 EVALUATION AND CRITERIA

Proposals will be evaluated based on the following criteria:

- Technical expertise and experience (especially SFDR advisory and fund-level implementation)
- Relevance and practicality of the proposed training approach
- Track record in delivering training to similar audiences
- Budget and value for money
- Ability to tailor to the ICFA/ISFA context

8 SUBMISSION INSTRUCTIONS

Proposals must be submitted by email to Morgana Bourggraff at contact@acceleratingimpact.org no later than 16 August 2026, at midnight CET. Questions may be directed to Ms Bourggraff at the same address.