

IMPACT INVESTING MONTHLY

November 2025

Your monthly update on impact investing

Impact Investing at AOWM

Seeking companies that
turn a profit making a
sustainable impact on
society and the
environment

November's update includes a company highlight on Schneider Electric, data center energy use, and links to further resources on these fronts. As always, if you would like to talk about impact investing in general or your impact portfolio specifically, please do not hesitate to email me.

Grace and Peace,



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Highlight on Schneider Electric

Schneider Electric (se.com) is a French company focused on energy efficiency, electrification, automation, and digitalization in buildings and infrastructure across the globe.

Its [mission](#) is to “electrify, automate, and digitalize every industry, business, and home, driving efficiency and sustainability for all,” and with offices in over 100 countries, Schneider Electric seeks to reduce carbon emissions and energy waste through enabling efficient use and management of electricity. Through its products, services, and own operations, Schneider Electric aims to be a leader in [climate action](#) as well as growing the [circular economy](#). See more on its products and services [here](#) or click on the video link below. Schneider Electric's roots stretch back to 1836 when the Schneider



brothers started an iron foundry in Le Creusot, France. You can see more about Schneider Electric's history [here](#).

Schneider Electric [ranks 1st on Corporate Knights Global 100](#), a list of public companies that are “driving the transition to a low-carbon, circular economy” according to research by Corporate Knights.



Graphic of the Month

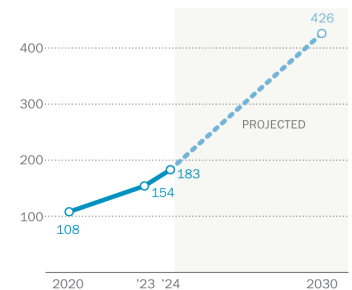
(Click on the images to view)

This month's graphics come from a Pew Research Center report entitled [“What we know about energy use at U.S. data centers amid the AI boom.”](#) Although they can range in size from about 500 servers to upwards of 5,000+ servers, there are roughly an estimated 4,000 data centers in the United States, with [Virginia holding the most](#) at 643, followed by Texas and California.

Data centers currently account for about 4% of the United States total electricity consumption and 26% of Virginia's power consumption. While most of the electricity is used to power the computer servers as they process and store information, a lot goes toward the HVAC and cooling systems to keep the servers from getting overheated. See the [Pew Research Center article](#) for more information on all of these fronts.

Electricity consumption at U.S. data centers is expected to more than double by 2030

Total electricity consumption by U.S. data centers (terawatt-hours)

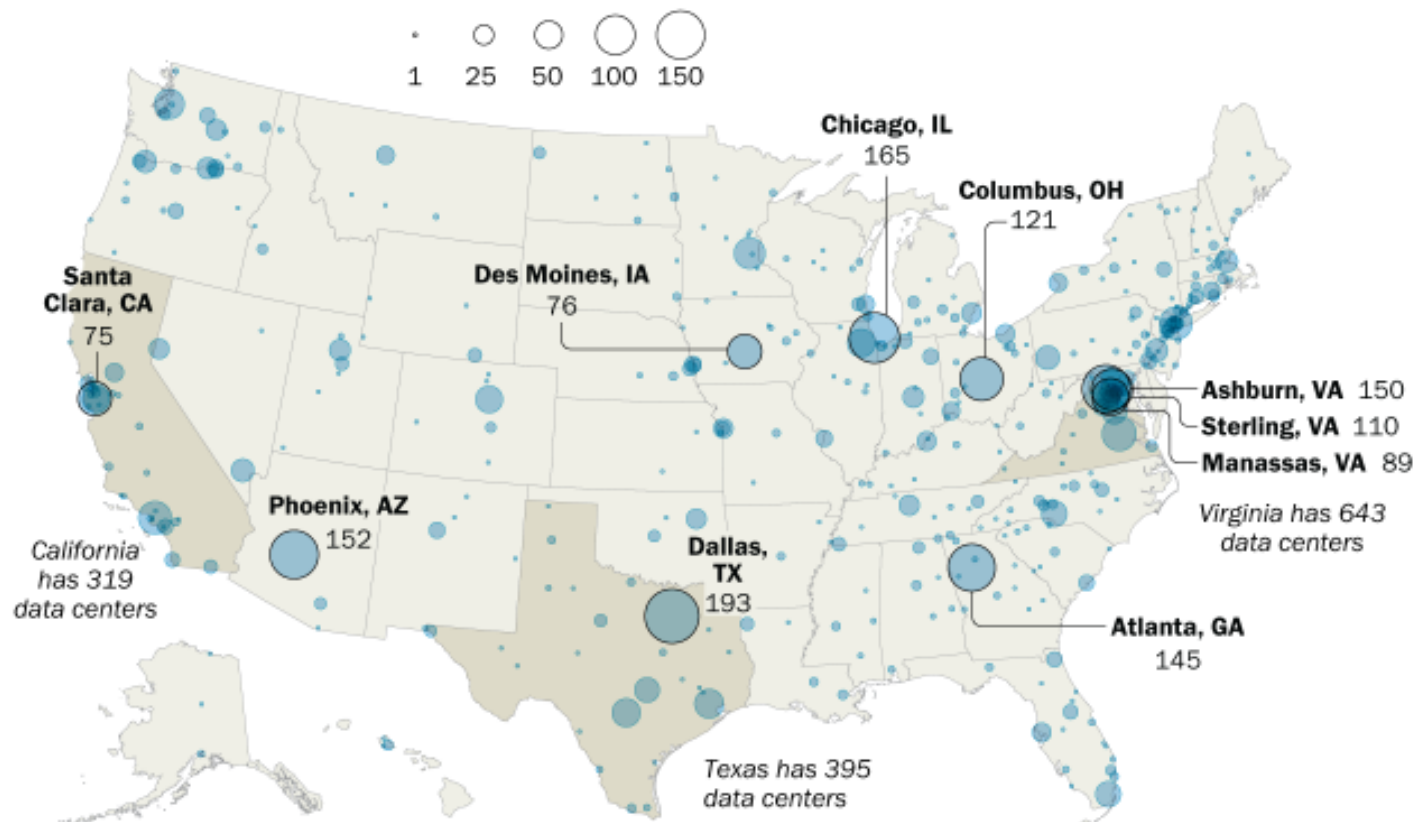


Note: 2030 projection is based on IEA's "base case" scenario, which assumes current industry forecasts and regulatory conditions persist.
Source: International Energy Agency, "Energy and AI," April 2025.

PEW RESEARCH CENTER

Virginia, Texas and California lead in number of data centers

Number of data centers, by market



Note: Includes operational data centers and those in development. Refer to the Data Center Map methodology for more details.
Source: Data Center Map, accessed Oct. 20, 2025.

PEW RESEARCH CENTER

Resources

“This French energy-solutions powerhouse is the world’s most sustainable company of 2025”

Corporate Knights
January 21, 2025
(5 min read)

Can an AI data center be ‘green’

Marketplace Podcast
Nov 6, 2025
(~4 min listen)

*Electrifying:
The Story of Lighting Our Homes*

Science Museum of London
January 28, 2020
(7 min read)

*How Much Energy Does AI Use?
The People Who Know Aren’t Saying*

WIRED
June 19, 2025
(7 min read)

What is Impact Investing?

The term **“Impact Investing”** focuses on investments made *“with the intention to generate positive, measurable social and environmental impact alongside a financial return.”*¹ Many people talk about this intersection of social, environmental, and financial values as a focus on the **triple bottom line** of **people, planet, and profit.**² Others also highlight the ways that environmental, social, and financial values are really **“blended values,”**³ given that the operations, products, and services of any business always have effects (whether positive or negative) on society, the environment, and the financial bottom line. A common definition of **“sustainability”** along these lines is *“meet[ing] the needs of the present without compromising the ability of future generations to meet their own needs.”*⁴

“ESG” is a term that stands for “Environmental, Social, and Governance” factors that can affect a company’s long term financial health as well as well-being for broader society and the environment. The term ESG was coined in a 2004 United Nations report entitled, “Who Cares Wins: Connecting Financial Markets to a Changing World,” and this report highlights the ways *“successful investment depends on a vibrant economy, which depends on a healthy civil society, which is ultimately dependent on a sustainable planet.”*⁵

ESG analysis usually focuses primarily on how a changing world (socially and environmentally) might affect a company’s financial return. Impact analysis usually focuses on how a company’s operations and products affect society and the environment. The two types of analysis are distinct but complementary and can be used to help you blend your values with your investments.

Sources

¹ [Thegiin.org](https://thegiin.org); see also rockefellerfoundation.org/from-the-archives/global-impact-investing-network-giin/

² “Triple bottom line,” *The Economist*, Nov 17, 2009. economist.com/news/2009/11/17/triple-bottom-line

³ [Blendedvalue.org](https://blendedvalue.org)

⁴ *Our Common Future*, UN World Commission on Development and Environment, 1987, p. 24

⁵ [UNepfi.org/fileadmin/events/2004/stocks/who_cares_wins_global_compact_2004.pdf](https://unepfi.org/fileadmin/events/2004/stocks/who_cares_wins_global_compact_2004.pdf)

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