

## SUSTAINABLE FINANCE – FOUNDATION

### Virtual classroom

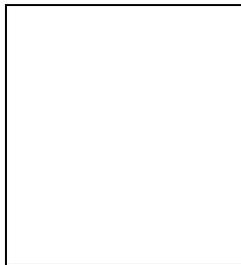
### ORGANISATION SHEET

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| <p><b>Introduction &amp; Objectives</b></p> | <p>It is quite clear today for actors of the financial sector that they need to define and show how they create value to society, but even beyond, how they contribute to securing legitimacy and trust in society and help to support the financing of the evolving policy environment.</p> <p>The global momentum around responsible investment is driven by:</p> <ul style="list-style-type: none"> <li>• increased recognition in the financial community that ESG factors play a material role understanding that ESG factors are part of investor's responsibility towards their clients</li> <li>• increasing legal requirements at EU level to protect the long-term interests of investors, beneficiaries and the wider financial system</li> <li>• peer-pressure rising from market competition fostering the need to enlarge the product offering</li> <li>• stakeholders becoming increasingly demanding regarding transparency about where and how their money is invested</li> <li>• risk-management approach to avoid value-destroying reputational risks.</li> </ul> <p><b>Objective</b></p> <p>Provide professionals working in the financial and banking sector with fundamental knowledge on sustainable finance.</p> |
| <p><b>Methodology</b></p>                   | <p>This course is NOT a webinar but an interactive programme. Participants are encouraged to be engaged in the sessions and to this end to have their webcam on and a well-functioning microphone. The course articulates around an innovative teaching style that combines theory and practical business case studies allowing candidates to concretely put into practice the main concepts and definitions learned.</p> <p>Participants are encouraged to be engaged in the sessions and to this end to have their webcam on and a well-functioning microphone.</p>  |
| <p><b>Target audience</b></p>               | <p><b><u>Bankers located in North Macedonia</u></b></p> <p>The course is designed for banks, asset managers, insurance companies and other relevant institutions wishing to embrace sustainability into their business models.</p>   |
| <p><b>Expert</b></p>                        | <p>Ms <b>Lucie Gourdon-Berwick</b> is graduated in Sustainable Finance from Kedge Business School and Rey Juan Carlos University in Spain, and with a first experience in extra-financial rating dedicated to responsible</p>  |

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governance, Lucie works on the integration of ESG criteria in strategic processes. and operational in the finance industry.

Thanks to her expertise in responsible finance, she has in-depth knowledge of the standards and norms of responsible investment.

Lucie is a Sustainable Finance Senior Advisor and Analyst at Forethix in Luxembourg.

**Language**

A good command of English is required.

**Participants**

Max 15 participants.

**Duration,  
Dates & Time**

1 session of 4 hours  
27 January 2023  
From 09:00 to 13:00

**Platform &  
Technical  
requirements****Webex**

To join the course, attendees are requested to have:

- a stable internet connection
- a device (preferably a PC) with well-functioning microphone and webcam (mandatory to be able to interact with the trainer and their peers).



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## SUSTAINABLE FINANCE – FOUNDATION

### CONTENT

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#### **The Sustainable Finance eco-system**

- WHY – Sustainable Finance serves the interest of a sustainable society. The financial sector can be catalyst for change in the context of ESG transition for economic systems. Its role is instrumental to the successful implementation of sustainable frameworks, such as: UN Principles for Responsible Investment (UN PRI), UN Principles of Responsible Banking (UN PRB) and the Sustainable Development Goals (SDGs).
- WHAT - Explore the current Sustainable Finance concepts and definitions (ESG, SDG, SRI, responsible investing...) to build up a solid foundation to face upcoming business challenges.
- WHO - Getting to know roles and responsibilities of the main stakeholders who actively contribute to mainstream Sustainable Finance globally as well as locally.
- HOW – Sharing industry best practices through practical business case studies.

#### **Regulation**

The regulatory framework: current and future prospects

#### **Sustainable finance to support the Sustainable Development Goals (SDGs)**

- What are the United Nations Sustainable Development Goals?
- How can the financial system support the objectives of the SDGs?

#### **Sustainable finance in numbers**

Review of the latest Sustainable Finance trends, facts and figures to get a better understanding of the dimension and the relevance of this specific sector

#### **Case study**

Which actors currently have a Sustainable Finance offering? Why do they offer it? How did they implement it? Practical case studies on real implementations of Sustainable Finance initiatives from major players in Europe. Participants will make their own research during the class and debrief to the class. Results will be provided during the class.



*Remark: By delivery date, any training documentation shall be subject to regular reviews and updates amending the table of content as described herein.*

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