Sustainable Finance and ESG Integration for Banks Training Course



07 - 11 Dec 2026

Lisbon

4500 € (Per Person)

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Course Introduction / Overview:

The global financial landscape is undergoing a profound transformation, driven by the urgent need to address climate change, social inequality, and governance challenges. This shift has elevated Sustainable Finance and Environmental, Social, and Governance (ESG) integration from a niche interest to a core strategic imperative for the banking sector. This comprehensive training course offered by BIG BEN Training Center is meticulously designed to equip financial professionals with the essential knowledge and practical skills to navigate this new paradigm. We delve deep into the principles of sustainable finance, moving beyond theoretical concepts to practical application. The curriculum explores how to embed ESG criteria into every facet of banking operation, from credit risk assessment and investment analysis to product development and regulatory reporting. Drawing on insights from leading academics like George Serafeim of Harvard Business School, who has extensively researched the link between ESG performance and corporate value, this course provides a robust framework for action. Participants will gain a thorough understanding of key frameworks and regulations, learning to identify both the risks and the immense opportunities presented by the transition to a sustainable economy, as outlined in works like "Sustainable Investing: A Path to a New Horizon". This program is your definitive guide to building a resilient, responsible, and profitable banking strategy for the future.

Target Audience / This training course is suitable for:

- Financial Analysts and Investment Professionals.
- Risk Management Officers and Managers.
- Corporate and Commercial Bankers.
- Portfolio and Asset Managers.
- Compliance and Legal Officers.
- Sustainability and Corporate Social Responsibility (CSR) Managers.
- Treasury and Capital Markets Professionals.
- Members of the Board of Directors and Senior Executives.
- Regulators and Policymakers in the financial sector.

Target Sectors and Industries:

- Commercial and Retail Banking.
- Investment Banking and Asset Management.
- Private Equity and Venture Capital.
- Insurance and Reinsurance Companies.
- Development Finance Institutions.
- Financial Services and Consulting Firms.
- Governmental bodies, financial regulatory authorities, and central banks.
- Credit Rating Agencies.

Target Organizations Departments:

- Risk Management Department.
- Credit Analysis and Lending Departments.
- Investment and Portfolio Management.
- Corporate Strategy and Business Development.
- Compliance and Regulatory Affairs.
- Sustainability and Corporate Responsibility Departments.
- Treasury and Capital Markets.
- Internal Audit and Control.
- Product Development and Innovation.

Course Offerings:

By the end of this course, the participants will have able to:

- Analyze the core principles of sustainable finance and the materiality of ESG factors in banking.
- Integrate ESG criteria into credit risk assessment and loan origination processes.
- Develop and evaluate sustainable financial products such as green bonds and sustainability-linked loans.
- Assess climate-related financial risks and opportunities using frameworks like the TCFD.
- Navigate the complex global landscape of ESG regulations and disclosure standards like SFDR and GRI.
- Formulate a strategic approach to ESG integration that aligns with the bank's long-term objectives.
- Effectively engage with stakeholders on sustainability performance and reporting.
- Measure and manage the carbon footprint of lending and investment portfolios.
- Apply ESG data and analytics to inform financial decision-making.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be immersive, interactive, and highly practical, ensuring that participants can immediately apply their learning within their professional roles. We move beyond traditional lecture-based formats to create a dynamic learning environment. The course is built upon a foundation of real-world case studies from leading global financial institutions, allowing participants to analyze successful ESG integration strategies and learn from practical challenges. Interactive group discussions and workshops will facilitate peer-to-peer learning and the exploration of complex issues like regulatory compliance and stakeholder engagement. Practical exercises, such as conducting an ESG risk assessment on a sample loan portfolio or designing a green bond framework, will be central to the learning experience. Our expert instructors will provide continuous feedback and facilitate sessions that encourage critical thinking and problem-solving. This blended approach, combining expert instruction with hands-on application and collaborative analysis, ensures a deep and lasting understanding of how to effectively implement sustainable finance and ESG principles within the banking sector.

Course Agenda (Course Units):

Unit One: Foundations of Sustainable Finance and ESG

- Introduction to Sustainable Finance and its evolution.
- Understanding the three pillars: Environmental, Social, and Governance (ESG).
- The business case for ESG integration in the banking industry.
- Global drivers: Climate change, social trends, and regulatory pressure.
- Key concepts: Materiality, impact investing, and stakeholder capitalism.
- The role of the UN Sustainable Development Goals (SDGs) in finance.
- Introduction to major global initiatives and alliances.

Unit Two: ESG Integration in Banking Operations

- Integrating ESG factors into credit risk analysis and management.
- ESG due diligence for corporate and project finance.
- Developing sustainable lending policies and frameworks.
- ESG considerations in investment and asset management.
- Techniques for portfolio screening and ESG scoring.
- Engagement and stewardship strategies for portfolio companies.
- Managing reputational and operational risks associated with ESG.

Unit Three: Sustainable Finance Products and Markets

- Overview of the green, social, and sustainability bond markets.
- Structuring and issuing sustainability-linked loans and bonds.
- Exploring innovative products like transition bonds and blue bonds.
- Introduction to blended finance and impact investing.
- Developing sustainable trade finance solutions.
- The role of fintech in advancing sustainable finance.
- Analyzing market trends and growth opportunities.

Unit Four: Climate Risk and Financial Disclosure

- Understanding physical and transition risks of climate change.
- Introduction to the Task Force on Climate-related Financial Disclosures (TCFD) framework.
- Conducting climate scenario analysis for banking portfolios.
- Measuring and managing financed emissions (Scope 3).
- Navigating the global landscape of ESG reporting standards (GRI, SASB, IFRS).
- The EU Taxonomy for Sustainable Activities and its implications.
- Understanding the Sustainable Finance Disclosure Regulation (SFDR).

Unit Five: Strategy, Governance, and the Future of Sustainable Banking

- Developing a comprehensive corporate ESG and sustainability strategy.
- The role of the board and senior management in driving the ESG agenda.
- Building a culture of sustainability within a financial institution.
- Metrics and Key Performance Indicators (KPIs) for tracking ESG performance.
- The future of ESG data, analytics, and artificial intelligence.
- Emerging themes: Biodiversity, circular economy, and just transition.
- Creating long-term value through a purpose-driven banking model.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

How can financial institutions balance the fiduciary duty to maximize shareholder returns with the broader societal responsibility to drive a sustainable and just transition?

What unique qualities does this course offer compared to other courses?

This training course distinguishes itself through its unwavering focus on the practical application of sustainable finance principles specifically within the banking context. While many programs offer a theoretical overview of ESG, our curriculum is engineered to bridge the gap between concept and execution. We concentrate on the granular, operational challenges bankers face, from integrating ESG data into existing credit risk models to structuring compliant and marketable sustainable finance products. The course provides an in-depth, up-to-date analysis of the rapidly evolving regulatory landscape, including the EU Taxonomy and SFDR, ensuring participants are equipped not just for today's requirements but are also prepared for future developments. Rather than simply listing frameworks, we dissect them through case studies, demonstrating how to implement recommendations from bodies like the TCFD effectively. The curriculum moves beyond environmental factors to provide a balanced and nuanced exploration of the social and governance pillars, which are often critical sources of risk and opportunity in banking. It is this pragmatic, banking-centric, and forward-looking approach that provides participants with a uniquely actionable and strategic skill set.