ESG and sustainability reporting

EU Taxonomy and Sustainable Finance

One day to understand the EU Taxonomy and sustainable finance from the viewpoint of a company that sells to European customers or seeks green financing: environmental objectives, eligibility and alignment, technical criteria, do no significant harm, minimum safeguards. You apply the grid to your activities and your investment projects.

Duration : 1 day

Objectives

1. Explain Regulation (EU) 2020/852: six environmental objectives, eligible activities and aligned activities
2. Apply the three conditions of alignment: substantial contribution, do no significant harm, minimum safeguards
3. Identify the indicators published by companies in scope: share of aligned turnover, CapEx and OpEx
4. Respond to your customers' and banks' data requests related to the Taxonomy
5. Place the Taxonomy within sustainable finance: green bonds, sustainability-linked loans, lender expectations

Programme

Day 1 — morning

• Why a taxonomy: directing finance to sustainable activities, limiting greenwashing

• Six objectives: mitigation, adaptation, water and marine resources, circular economy, pollution, biodiversity and ecosystems

• Eligibility, then alignment: technical screening criteria, do no significant harm, minimum safeguards

• Disclosure obligations: Delegated Regulation (EU) 2026/73, applicable since 1 January 2026, and its 10% materiality threshold

Day 1 — afternoon (workshop)

• What a European customer may ask of you: equipment performance data, component compliance, evidence

• Sustainable finance: green bonds, sustainability-linked loans, criteria of banks and lenders

• Workshop: eligibility and alignment analysis of two activities or projects of your company

• Knowledge test and list of data to prepare for your customers and funders

Teaching methods

• Guided reading of the regulation and the technical criteria applicable to your activities

• Alignment analysis exercise on your own projects

• Examples of customer and bank requests, made anonymous

• Bilingual French / English materials to read the technical criteria in both languages

• Final test on eligibility, alignment and indicators

Assessment and documents

Knowledge test at the end of the day, follow-up evaluation at D+1, numbered training certificate verifiable online for each participant. The company receives the training report and the eligibility and alignment analysis from the workshop.

Bilingual materials for every participant; each classroom course comes with its digital twin on OmniLearn.

Good to know

For green financial instruments, the half-day "Green Bonds and Climate Finance: ISO 14030 and ISO 14097" complements this course. The climate information requested by investors is covered in "IFRS S1 and S2 (ISSB): Climate-Related Disclosures".

Practical information

Duration	1 day
Audience	Finance, CSR, investment, banking relations, manufacturers of equipment sold in Europe
Group size	Groups of 6 to 12 participants, in-company
Format	In-company, face to face on your site
Language	French, Darija or English; bilingual materials
Funding	OFPPT special training contracts (TFP), GIAC, Maroc PME: we prepare the applications with you, at no extra cost.
Programme customisation	Programme adapted to your procedures, your equipment and your audience

Frequently asked questions

Does the Taxonomy apply to a Moroccan company?

It imposes nothing on you directly. It applies to companies subject to European reporting and to financial players in the Union, which may ask you for data to qualify a purchase, an investment or a financing.

What is the difference between an eligible and an aligned activity?

An activity is eligible when it appears in the Taxonomy's delegated acts. It is aligned when it also meets the technical criteria for substantial contribution, causes no significant harm to the other objectives and complies with the minimum safeguards.

Do we need financial knowledge to take the course?

Basic notions are enough. The day explains the turnover, CapEx and OpEx indicators with simple examples; technical teams mainly find the criteria that concern their equipment and processes.