ESG and sustainability reporting

Green Bonds and Climate Finance: ISO 14030 and ISO 14097

A half day to prepare a green financing project that the bank or investor can qualify and monitor. Process of the ISO 14030 series for green bonds and green loans, taxonomy, verification, and what financiers assess with ISO 14097:2021: you leave with the outline of the application for one of your projects and the list of climate data to produce.

Duration : 0.5 day

Objectives

1. Explain the four parts of the ISO 14030 series: green bonds, green loans, taxonomy, verification
2. Describe the process of qualifying a green instrument: eligible projects, management of proceeds, impacts, reports
3. Identify what financiers assess with ISO 14097:2021 and the data they will ask you for
4. Prepare the outline of a green financing application for a project in your company

Programme

Half day

• Green finance: green bonds and loans, first landmarks in Morocco and the European Union

• ISO 14030 series: designation of projects, allocation and tracking of funds, impact indicators, reports, verification

• ISO 14097:2021: how banks and investors assess the climate alignment, impact and risks of their financing

• Exercise: outline of the green financing application for a project at your site (energy efficiency, solar, water treatment)

• Knowledge test

Teaching methods

• Exercise on a real investment project of your company

• Guided reading of a published green bond framework and allocation report

• List of climate and environmental data expected by financiers

• Exchanges between finance and technical teams on impact indicators

• Final test

Assessment and documents

Knowledge test and follow-up evaluation at D+1. Numbered training certificate, verifiable online, for each participant; training report and financing application outline handed to the company.

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

Good to know

The EU Taxonomy is covered in "EU Taxonomy and Sustainable Finance". ISO 14030-1, ISO 14030-2 and ISO 14030-4 are under systematic review: the 2021 editions remain those that apply.

Practical information

Duration	0.5 day
Audience	Finance, treasury, CSR, investment project sponsors; companies seeking green financing
Prerequisites	No prerequisites
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

Can an SME obtain a green loan?

Yes. The ISO 14030 series covers green loans as well as bonds; what matters is the eligibility of the project, the tracking of funds and the measurement of impacts. The conditions for granting remain those of your bank.

Why is my bank talking about ISO 14097?

This standard gives financiers a framework to assess their financing with regard to climate change. To apply it to their portfolio, they need the emissions, pathway and transition plan of their customers.

What is the difference from the European green bond?

The European green bond designation comes under a Union regulation based on the EU Taxonomy. ISO 14030 is a voluntary international standard. The same project can be documented for both, with different criteria.