

Technology  
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Knowledge

# Financing the Transition: Transition Finance Fundamentals for Bankers

Programme Code: THGES00P26051

27 May 2026 (Wednesday)  
12:00nn – 2:00pm


**2  
HOURS**
**HKIB SFC PWMA  
CPD CPT OPT**

## Programme Outline

With the publication of the Hong Kong Taxonomy for Sustainable Finance Phase 2A in January 2026 – introducing a three-tier classification system including an explicit transition category with sunset dates – banking professionals now need practical skills to classify activities, assess transition plan credibility, structure transition instruments, and detect transition-washing risks. This course addresses these needs through the latest ICMA and LMA frameworks (including the November 2025 Climate Transition Bond Guidelines), real APAC case studies, and a practical due diligence framework designed specifically for transition finance assessment.

1. Opening & Poll – Introduction; confidence poll on transition finance assessment; overview of objectives
2. Why Transition Finance Matters Now – The green finance gap; green vs. transition distinction; HK regulatory timeline through 2030; why this matters for each banking role
3. The HK Taxonomy Phase 2A – Three-tier classification; four core principles; technical screening criteria and sunset dates; cross-border taxonomy navigation
4. Transition Finance Instruments & Frameworks – ICMA CTB Guidelines and CTF Handbook; LMA Guide to Transition Loans; instrument toolkit (transition bonds, SLBs, SLLs, blended finance); KPI selection; transition-washing red flags; SPO vs. bank/investor approaches; HSBC and Standard Chartered frameworks as practitioner examples
5. Assessing Transition Plan Credibility – The 4T Framework (Targets, Technology, Timeline, Transparency); connecting to credit decisions; APAC case studies including Castle Peak Power, NYK Line, Thailand Sovereign SLB, and cautionary examples
6. Closing & Key Takeaways – Five Banker's Principles for Transition Finance Credibility; resources and further learning pathways (ECF-GSF, CBSS)

## Speaker Introduction

The speaker is a seasoned ESG educator and advisor with over 20 years of experience in sustainability, governance, and stakeholder engagement across Asia-Pacific. Formerly a Partner at two prominent global audit and consulting firms.

He now serves as Head of Sustainability at a Singapore-listed company and lectures regionally on ESG and governance

## Target Audiences

1. Banking Practitioners
2. Relationship Managers, ESG and Sustainability Managers, Risk Managers
3. HKIB Professional Qualification Holders (eligible for CPD Core Hours):








## Programme Delivery

Virtual Classroom (Zoom)  
Cantonese



## Application DEADLINE

20 May 2026 (Wednesday)



**APPLY NOW!**

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