

EXECUTIVE TRAINING COURSE

PROGRAMME

Transition Plans in the Financial Sector

12 - 14 May 2025

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Introduction

As banks adapt to new regulations and changing market dynamics, transition plans have become essential for shaping long-term strategies, engaging stakeholders, and managing risks. These plans outline how institutions intend to align their business models with a 'net zero' economy, incorporating sustainability into their governance, products, and services. In response to global initiatives aimed at improving the transparency and credibility of banks' net zero commitments, the EU has introduced a range of new requirements, including corporate disclosure (CSRD), due diligence (CSDDD), and prudential transition risk (CRD6) regulations. Navigating this evolving regulatory framework presents significant challenges for banks and other financial institutions (e.g., insurers), prudential supervisors, and firms across the real economy, where decarbonization is essential for the transition.

Creating credible transition plans and assessing their effectiveness requires a multidimensional approach that considers legal, financial, commercial, and sector-specific perspectives. This FBF course draws on the expertise of a diverse faculty to equip participants with the necessary context, tools, and practical insights to manage transition plans in their organizations. Given the novelty of the topic, the course employs interactive lectures, group exercises, and open discussions (under Chatham House rule) to encourage critical analysis and dialogue about the development and future of transition plans.

Location | EUI Premises in Florence, Italy

Organisers and Core Faculty

- Pierre Schlosser | EUI
- Agnieszka Smoleńska | LSE

External Faculty

- Simon Dikau | CETEx LSE
- Susannah Fitzherbert Brockholes | HSBC
- Gabor Gyura | UNEPFI and EUI
- Fabien Le Tennier | EBA
- Leonardo Meeus | FSR EUI
- Pierre Monnin | CEP/CETEx LSE
- Petter Natås | DNB
- Daisy Pacheco | RMI/PACTA
- Ira Poensgen | CETEx LSE/TPT

Format | Residential

Level | Introductory, Intermediate

Approach | Qualitative

Learning Objectives:

- Build confidence in understanding the implications of net zero transitions for financial institutions.
- Gain a thorough understanding of regulatory requirements for transition plans.
- Develop advanced knowledge of methodologies and approaches for preparing transition plans from both regulatory and banking perspectives.
- Equip participants with practical tools to actively contribute to transition planning in their professional roles.
- Critically assess the credibility and effectiveness of transition plans.
- Identify key challenges and limitations of transition plans, including their connections to taxonomies.

Target audience: Representatives from financial and insurance supervisors, banks, other financial institutions, professional services (including consultants and law firms), supervisors, international, regional, and domestic development banks, international organisations, and academics.

MONDAY

12 MAY

12:00 - 13:00	Lunch
13:00 - 14:00	Presentation of the School and of the course followed by a Tour de Table, outline of the course, ice breaking activity and concept mapping exercise
14:00 - 15:30	Session 1 – What is ‘net zero’ transition
15:30 - 16:00	Coffee break and group picture
16:00 - 17:30	Session 2 – Transition plans: from market standards to mandatory requirements
17:30 - 18:30	Cocktail

TUESDAY

13 MAY

09:30 - 11:00	Session 3 – Micro and macro-prudential perspectives on transition planning
11:00 - 11:30	Coffee break
11:30 - 13:00	Session 4 - Credible transition plans: scenario analysis, management quality and carbon performance
13:00 - 14:00	Lunch
14:00 - 15:30	Session 5 – Practical exercise the do’s and don’ts of transition plans
15:30 - 16:00	Coffee break

16:00 - 17:30 **Session 6 – Transition in the energy sector**

17:30 - 18:00 **Cocktail**

18:00 - 18:45 **Guided tour of Schifanoia (optional)**

WEDNESDAY

14 MAY

09:30 - 11:00 **Session 7 – Sectoral approaches in transition planning: real estate case study**

11:00 - 11:30 **Coffee break**

11:30 - 12:30 **Session 8 – Sustainable finance in transition plans**

12:30 - 13:15 **Q&A and closing remarks**

13:15 - 14:00 **Lunch and end of the course**



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