

ENHANCED COMPETENCY FRAMEWORK on Green and Sustainable Finance (ECF-GSF)



Associate Green Finance Professional (Product & Servicing)

(Recognised under the QF at Level 4, QR Registration No.: 24/000668/L4)
(Validity Period from 01/08/2024 to 31/07/2025)



Associate Green Finance Professional (Climate Risk Management)

(Recognised under the QF at Level 4, QR Registration No.: 24/000669/L4)
(Validity Period from 01/08/2024 to 31/07/2025)



Associate Green Finance Professional (Sustainability Disclosures and Reporting)

(Recognised under the QF at Level 4, QR Registration No.: 24/000670/L4)
(Validity Period from 01/08/2024 to 31/07/2025)



Associate Green Finance Professional (Sustainability Strategy, Compliance and Control)

(Recognised under the QF at Level 4, QR Registration No.: 24/000671/L4)
(Validity Period from 01/08/2024 to 31/07/2025)



Enhanced Competency Framework for Banking Practitioners

With the aim of supporting capacity building and talent development for banking professionals, the Hong Kong Monetary Authority (HKMA) has been working together with the banking industry to introduce an industry-wide competency framework – “Enhanced Competency Framework (ECF) for Banking Practitioners” in Hong Kong.

The Hong Kong Institute of Bankers is the programme and qualification provider for the ECF on Green and Sustainable Finance (GSF), with the following objectives:

- To develop a sustainable talent pool of GSF practitioners for the banking industry; AND
- To raise and maintain the professional competence of existing GSF practitioners in the banking industry.

Overview of The Hong Kong Institute of Bankers (HKIB)

HKIB has been serving the local banking community in the provision of professional training and certification services since 1963. HKIB is the first not-for-profit institution in Hong Kong to issue banking qualifications up to QF Level 6 under the HKQF and was appointed by the Education Bureau as a Professional Qualifications Assessment Agency in August 2020. With an objective to maintain and further develop the territory’s status as an international financial centre, the Institute works with the support of banks, regulators, financial institutions, academic institutions, and various professional bodies to provide local banking practitioners with professional training and development opportunities.

In view of the changing landscape of the banking and financial services industry in Hong Kong and mainland China, as well as on a global scale, the importance of continuing to enhance the standards of professional development has gained increased attention. HKIB endeavours to provide and enhance its training and development products in order to equip its members with essential knowledge and skills that meet the industry’s needs.

Since the implementation of ECF in 2018, various programmes for different job functions in banking industry have been developed and integrated into HKIB’s flagship Certified Banker (CB) Programme which offer generalist, specialist, and strategic topics. The rationale for putting all programmes under one professional banking qualification is to promote an industry-based common qualifications benchmark. While ECF programmes offer “role-based” knowledge and certification to relevant practitioners, CB is offering a vocational qualification pathway for further career advancement, being continuously enhanced to nurture more holistic banking professionals and ultimately, supporting the industry to develop a continuous learning culture and a sustainable talent pool so as to maintain the competitiveness of Hong Kong as an international financial centre.

Qualifications Framework

The following four Professional Qualifications are recognised under the QF at Level 4:

Associate Green Finance Professional (Product & Servicing) (AGFP(PS))¹

Associate Green Finance Professional (Climate Risk Management) (AGFP(ClimRM))²

Associate Green Finance Professional (Sustainability Disclosures and Reporting) (AGFP(SDR))³

Associate Green Finance Professional (Sustainability Strategy, Compliance and Control) (AGFP(SSCC))⁴

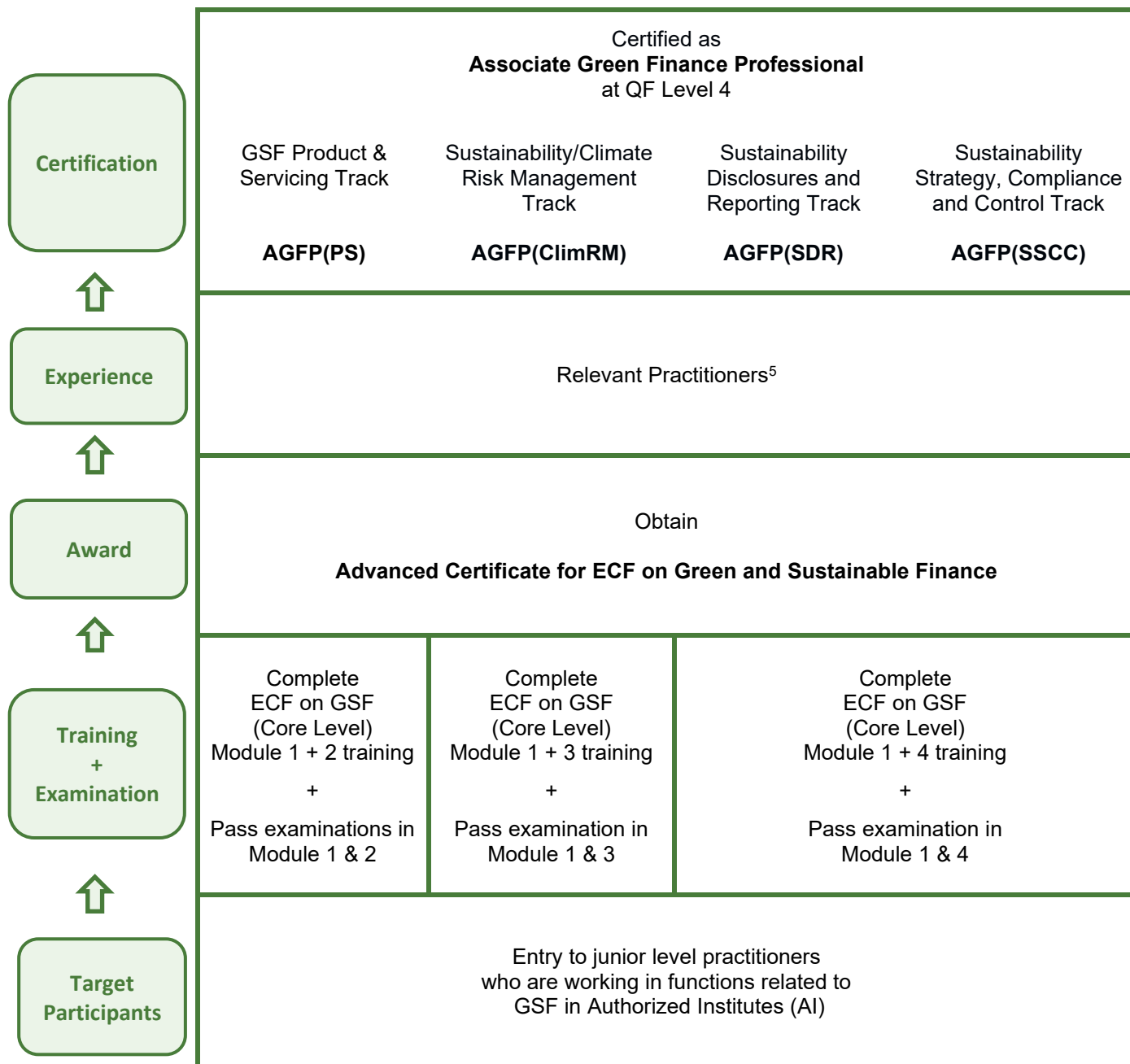
¹ QR Registration No.: 24/000668/L4, Validity Period from 01/08/2024 to 31/07/2025)

² QR Registration No.: 24/000669/L4, Validity Period from 01/08/2024 to 31/07/2025)

³ QR Registration No.: 24/000670/L4, Validity Period from 01/08/2024 to 31/07/2025)

⁴ QR Registration No.: 24/000671/L4, Validity Period from 01/08/2024 to 31/07/2025)

Becoming an Associate Green Finance Professional (Product & Servicing) (AGFP(PS)) / Associate Green Finance Professional (Climate Risk Management) (AGFP(ClimRM)) / Associate Green Finance Professional (Sustainability Disclosures and Reporting) (AGFP(SDR)) / Associate Green Finance Professional (Sustainability Strategy, Compliance and Control) (AGFP(SSCC))



⁵ Relevant Practitioners are persons who are working in the functions related to GSF within AIs with professional competencies to develop and integrate the corporate sustainability strategy into the green and sustainable investing and financing activities, sustainability and climate-related risk management as well as disclosures and reporting.

Certified Individual (CI)

AGFP(PS) / AGFP(ClimRM) / AGFP(SDR) / AGFP(SSCC) holders will be registered as CI and included in a public register on HKIB website. The CI Register posted on HKIB website enables the public recognition of AGFP(PS) / AGFP(ClimRM) / AGFP(SDR) / AGFP(SSCC) holders. To ensure your Professional Qualification reflected in the CI register, you are required to comply with the stated professional qualification requirements annually.

Continuing Professional Development (CPD)

All AGFP holders are required to comply with the following annual Continuing Professional Development (CPD) requirements in order to maintain the Professional Qualifications:

1. A minimum of 12 CPD hours is required for each calendar year (ending 31 December); and
2. At least 5 hours should be on topics related to GSF.

For more details, please refer to Continuing Professional Development (CPD) Scheme on HKIB Website. (Home > Membership > Individual Members > HKIB CPD Requirements)

ECF on Green and Sustainable Finance (Core Level)

Programme Content

Module 1 – Introduction to Sustainability

Learning Outcomes

Upon completion of this module, candidates should be able to

- Apply the key concepts and taxonomy related to sustainability.
- Analyse the latest trends and developments in GSF and the impact on banks.
- Apply the methodology and approaches to monitor, measure and report GSF or sustainability impacts and outcomes.
- Assess the risks posed by the exposure of financial institutions/sector to activities that are caused by environmental, social, governance, and climate events.

Module Outline

- Overview of Sustainability
- Green and Sustainable Finance Trends and Developments
- Taxonomy, Data and Disclosures

Module 2 – Fundamentals of Green and Sustainable Finance

Learning Outcomes

Upon completion of this module, candidates should be able to

- Assess the latest trends and developments of the GSF Market to understand how banks can align the investment and lending decisions with sustainability strategy and objectives.
- Analyse the fundamentals for different GSF products and instruments and their applications
- Apply the essential factors in green and sustainable investing, and the applications of ESG considerations in the investment process.
- Assess the carbon markets, carbon management and the latest developments.

Module Outline

- Overview of the GSF Market and its latest trends and developments
- Green and Sustainable Products and Instruments
- Green and Sustainable Investing
- Carbon Market

Module 3 – Sustainability Risks in Banking

Learning Outcomes

Upon completion of this module, candidates should be able to:

- Discern various types and impacts of sustainability risks in banking, including the climate and environmental risks in banking.
- Examine the approaches to identify, manage, analyse, and disclose the sustainability risk.
- Relate the application of climate models in the banking industry.
- Perform climate scenario analysis with data literacy.

Module Outline

- Overview of Sustainability Risks
- Climate Risk Management
- Climate Models and Scenario Analysis

Module 4 – ESG/Sustainability Strategy, Disclosures and Reporting

Learning Outcomes

Upon completion of this module, candidates should be able to:

- Relate the concepts of sustainability strategy and policy for banks' practices.
- Examine the importance of monitoring, measuring, reporting impacts, outcomes achievement, alignment of standards and flows of finance.
- Assess the methodologies used to prepare GSF-related disclosures in line with regulatory requirements, international best practices, principles by utilising standards and techniques.

Module Outline

- Green and Sustainable Banking Strategy
- ESG/Sustainability Disclosures and Reporting

Entry Requirements

The programme is open to both members and non-members of HKIB. Candidates must fulfil the stipulated minimum entry requirements with:

- Students of Associate Degree (AD) / Higher Diploma (HD) in any discipline or equivalent (QF L4);
- Equivalent qualifications or above; OR
- Mature applicants with at least 3 years of relevant banking experience with recommendations from employer

Remark:

Mature applicants (aged 21 or above) who do not possess the above academic qualifications but with relevant banking experience and recommendation from their employers will be considered on individual merit.

Medium of Instruction

- Training is delivered in classroom setting / zoom in either Cantonese or English supplemented with English materials.
- All the examination questions are set in English only.

Application

Applicants can submit their application via [MyHKIB](#).

General Enquiry / Feedback

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