

Sapieience Consulting Europe – Sustainable Finance

SOCIAL BONDS IN PRACTICE

Social bonds are a strongly growing asset class. For many investors investing in impactful social outcomes are an important part of a Just Transition. A recent survey of 720 European institutional investors by Goldman Sachs revealed that 36% were prepared to allocate more investment into social finance in the near-term.

This 3-hour practical will provide participants with specific insights into the opportunities and challenges of these instruments. The absence of an EU Social Taxonomy, no science-based data on social measurement and assessing long-term impact creates unique challenges for many social bond issuers and investors.

Participants will learn how these bonds are structured, the mechanics of impact reporting and how to perform due diligence on their own social finance investments.

Pricing: EUR 350 per participant (5 to max 8 participants)

BEST PRACTICE:

- Social bonds – the challenges of this rapidly growing asset class
- Transactions, monitoring and impact reporting
- Investor structuring due diligence.

BREAK

FACILITATED PRACTICE

Participants will apply the learning through:

- Examining either:
 - their own social bond investment opportunity and identify necessary due diligence and monitoring requirements for it OR
 - work on a specific internal challenge related to this investment activity OR
 - a Social bond case study supplied by the trainer.
- Compare ICMA's 'Impact Reporting for Social Bonds' against their institution's/ firm's social bond investment impact reporting.

LESSONS LEARNED

FOLLOW ON:

OPTIONAL 1:1 PROJECT COACHING EUR 350 per participant

Up to 4 weeks post the course, each participant can have a 1:1 one hour coaching session to discuss the project, its progress and challenges with the trainer who led the programme.

