

Invitation to express interest in participating in GFANZ Asia Pacific's 3rd case study publication

Concept and Objectives: Building on the [first](#) and [second iteration](#) which featured components of financial institutions' (FI) transition plans and full transition plans respectively, this iteration seeks to showcase how FIs are assessing clients' transitions and plans, in line with their own transition strategy. This iteration will offer a deeper dive into sector specific approaches, assessments and tools used to analyse clients' transitions. It will also explore how FIs are incentivising clients to transition via their suite of products and services offered.

- *Tentative scope: Up to 10 case studies*
- *Format: **Presentation Deck, with up to five slides allocated per institution** (change in format from previous iterations which were in report format).*
- *Engagement will occur between the GFANZ Secretariat and FIs bilaterally. FIs will be reminded not to provide competitively sensitive information as part of their case study submission. Any historic non-public information should be clearly marked, so that it can be handled appropriately.*

Content Expectations

1. Introduce FI's broad approach to assessing client transitions, in line with their own transition strategy.
2. Dive deeper into a specific 1) sector (e.g., given emissions profile and abatement potential); 2) assessment tool or guidance document (e.g. Climate Risk Questionnaire / Transition Finance Playbook / Scorebook); 3) Net-zero aligned product and services, including overarching approaches to assessing clients' strategies and performance
 - a. To the extent possible (noting no competitively sensitive information should be shared), share examples of specific historic transactions (potential for anonymising and/or aggregating information can be discussed with the Secretariat).
3. International FIs with global operations are encouraged to share and highlight own approaches taken in specific markets or regions (e.g. China or Southeast Asia), including market specific considerations.
4. Next steps from the status quo

Selection considerations (in no particular order)

- ✓ Demonstrates a clear organisational approach / methodology to assessing client transitions, with individual FI specific criteria or thresholds that support the FI's net-zero transition plan
- ✓ Transaction or strategy assessment incorporates the use and analysis of real-economy net-zero transition plans
- ✓ Showcases implementation / scaling of Transition Finance in challenging sectors, regions, asset classes, etc. E.g. hard-to-abate sectors, Asian EMDEs, enablers etc
- ✓ Demonstrates intention to refine individual approach as market and clients mature
- ✓ Demonstrates clear Asia focus and relevance

- ✓ Contributes to diversified representation across case study collection: Geographical, Financial sub-sectors, Real Economy sectors
- ✓ Priority will be given to FIs who have not already been featured in previous case study publications

Eligibility

- Financial institution active in net-zero efforts including transition planning and transition finance.
- Has APAC presence and operations – case study will have to have an Asian focus.
- Able to commit to a tentative project timeline of Jan- Apr 2025.
 - Commitment mainly entails aligning and providing content and reviewing edited content in a timely manner.
- Ability to disclose and provide further details and analysis on the abovementioned specific sectoral approach / assessment tool / product & service; as well as how it supports your organisation’s transition plan and approach.
 - Non publicly disclosed information (“new content”) is encouraged, to the extent it is not competitively sensitive.

To note

- Case studies are to be submitted in English.
- The publication will likely be launched via a webinar in June / July 2025. Contributors will have the opportunity to present and share their respective case studies.
- Additional opportunities in future regional capacity building and knowledge sharing events may also be provided.

Timelines

- Active commitment period: Jan 2025- May 2025.

Activity	Time period	Comments
Recruitment	December 2024	
Finalize participation	January 2025	
FI to share first draft	February 2025	
Editing rounds	March 2025	~2/3 rounds of back and forth can be expected.
Final checks and sign off	April 2025	
Design and Formatting	May 2025	
Launch event	June / July 2025	

To get involved

- If interested, please fill up the **attached questionnaire*** and send it to Joyce Khoh (ikhoh@gfanzero.com), copying Kai Jin Chow (kjchow@gfanzero.com) and apacnetwork@gfanzero.com by **18 December 2024**.
- You can expect to hear back from the APAC Secretariat by 31 December 2024.
- Should your case study be shortlisted, the Secretariat will follow up an **alignment call** to better understand and assess suitability.

- Participation will be finalized by January 2025.

*Should you have further questions pertaining to the project or questionnaire, or require a deadline extension, please contact the same email addresses listed above.