



# VISION 管 略

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甄瑞娴小姐

## Promoting Environmentally Friendly Investments in the Region

The Paris Agreement and the United Nations Sustainable Development Goals call for global action on green finance, and investments in green finance are thriving internationally. Governments and business communities are paying more attention to the healthy development of the green finance market.

Hong Kong is developing into a regional centre for international green finance. Independent third-party conformity assessments play an important role, helping issuers to improve the transparency and credibility of green projects, and enhancing the confidence of investors and stakeholders in green finance. The "Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area", promulgated by the Central Government, supports the establishment of an internationally recognised green bond certification institution.

With the support of the HKSAR Government to the national Green Finance policy, HKQAA has developed the Green Finance Certification Scheme, which makes reference to a number of widely recognised international and national standards. We are pleased that the Scheme has received a positive response from different sectors. Up to now, 34 cases have been completed, amounting to more than 6 billion US dollars' worth of certified green bonds and loans. The Scheme's certified green finance issuers were recognised in a presentation ceremony cum forum held at the HKEX Connect Hall on 25<sup>th</sup> March 2019. Senior officials from the Greater Bay Area, experts from renowned international organisations and the financial sector attended the event, exploring the development of green finance in the region.

During HKQAA's 30<sup>th</sup> anniversary year, we will go further and kick-off the pilot programme for the Green Fund Certification Scheme. The Scheme will support the Securities and Futures Commission in promoting its Strategic Framework for Green Finance. Also, to keep pace with innovations in the financial sector, we are developing professional rating services for fintech applications.

We believe our professional conformity assessments will motivate more organisations to participate in environmentally friendly investment and help speed up the pace of development of the green and innovative finance markets, thereby paving the way to a sustainable future for Hong Kong, our nation and the world.

## 促进区内的环境友善投资

隨著聯合國可持續發展目標及巴黎氣候變化協定的落實，全球對綠色金融的投資日益增加，各地政府和商界都十分重視綠色金融市場的健康發展。

香港正發展成為區內的國際綠色金融中心，當中獨立第三方認證扮演著十分重要的角色，有助發行人提高其綠色項目的透明度和公信力，增加投資者和持分者的信心。國家最近頒布的《粵港澳大灣區發展規劃綱要》，亦支持建設國際認受的綠色債券認證機構。

在香港特區政府支持國家的綠色經濟發展下，本局參考多個國際及國家標準，於去年推出「綠色金融認證計劃」，並十分高興得到各界的熱烈支持，至今已完成34個認證個案，獲認證的綠色債券及貸款的發行總額預計超過60億美元。本局亦於2019年3月25日假香港交易所香港金融大會堂舉行頒獎典禮暨論壇，表揚參與認證計劃的發行機構，並邀得多位大灣區高級官員、國際知名機構與國際財金界的精英及學者與會，一起探討綠色金融在區內的发展。

今年時值本局30周年志慶，我們更進一步，將啟動「綠色基金認證計劃」之先導計劃，支持證券及期貨事務監察委員會推動綠色金融策略框架；同時亦正開發金融科技應用的評級服務，以配合金融業界的创新发展。

相信本局的专业合格評定服務，將可推動更多機構參與環境友善投資，加快綠色及創新金融市場的發展步伐，為香港、國家及世界創造可持續發展的未来。

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# Green Finance Certification Scheme Presentation Ceremony cum Forum 2019

## 绿色金融认证计划颁授典礼暨论坛2019

*Hong Kong Quality Assurance Agency (HKQAA) successfully held the Green Finance Certification Scheme Presentation Ceremony cum Forum 2019 on 25<sup>th</sup> March, 2019, held at the HKEX Connect Hall. The Hon Matthew Cheung Kin-chung, GBM, GBS, JP, The Acting Chief Executive of the Hong Kong Special Administrative Region officiated at the event. The special guests were Mr James Henry Lau Jr, JP, Secretary for Financial Services and the Treasury, and Mr Wong Kam-sing, GBS, JP, Secretary for the Environment. The speakers were Dr Ma Jun, Chairman and President of Hong Kong Green Finance Association, and Ms Julia Brickell, Regional Head of Operations, East Asia and the Pacific, International Finance Corporation, a member of the World Bank Group etc.*

### Over 6 Billion US Dollars' Worth of Green Finance Certified

The Hong Kong SAR Government has been striving to promote the development of green finance in recent years. The "Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area", promulgated by the Central Government, supports the development of Hong Kong into a green finance centre in the Greater Bay Area, and the establishment of an internationally recognised green bond certification institution. With the support of Hong Kong SAR Government to the national Green Finance policy, HKQAA has developed the Green Finance Certification Scheme with reference to a number of widely recognised international and national standards on green finance. It aims to enhance the credibility of, and stakeholder confidence in, green financial instruments via independent, impartial third-party conformity assessments. Up to now, 34 cases have been completed, amounting to more than 6 billion US dollars' worth of certified green bonds and loans. Participants include organisations from the finance, property, public utility and manufacturing sectors.

*香港品质保证局于2019年3月25日假香港交易所香港金融大会堂举行「绿色金融认证计划颁授典礼暨论坛2019」，并邀得香港特别行政区署理行政长官张建宗先生，大紫荆勋贤，GBS，太平绅士担任主礼嘉宾。财经事务及库务局局长刘怡翔先生，太平绅士、环境局局长黄锦星先生，GBS，太平绅士、香港绿色金融协会主席及会长马骏博士、世界银行集团成员国际金融公司东亚及太平洋区营运主管Ms Julia Brickell等分别担任特别嘉宾及讲者。*

### 获证绿色金融发行总额逾60亿美元

近年香港特区政府大力推动绿色金融的发展，国家最近颁布的《粤港澳大湾区发展规划纲要》，更支持香港打造成大湾区的绿色金融中心，建设国际认可的绿色债券认证机构。在香港特区政府支持国家的绿色经济发展下，本局参考多个国际及国家标准，于2018年推出「绿色金融认证计划」，为发行者的绿色金融债务工具提供第三方认证服务，协助提升绿色金融的公信力及持分者信心。计划推出至今，已完成34个认证个案，获认证的绿色债券及贷款的发行总额预计超过60亿美元。参与者包括来自金融界、地产界、公用事业及制造业的知名机构。



香港特别行政区署理行政长官张建宗先生，大紫荆勋贤，GBS，太平绅士（中）、财经事务及库务局局长刘怡翔先生，太平绅士（右二）、环境局局长黄锦星先生，GBS，太平绅士（左二）、香港品质保证局主席卢伟国议员博士工程师，SBS，MH，太平绅士（右三）、副主席何志诚工程师（左三）、黄家和先生，BBS，太平绅士（左一）及总裁林宝兴博士（右一）合照。

The Hon Matthew Cheung Kin-chung, GBM, GBS, JP, The Acting Chief Executive of the Hong Kong Special Administrative Region (Middle), Mr James Henry Lau Jr, JP, Secretary for Financial Services and the Treasury (Right 2), Mr Wong Kam-sing, GBS, JP, Secretary for the Environment (Left 2), Ir Dr Hon. Lo Wai Kwok, SBS, MH, JP, Chairman (Right 3), Ir C S Ho (Left 3), Mr Simon Wong Ka Wo, BBS, JP, Deputy Chairmen (Left 1) and Dr Michael P H Lam, Chief Executive Officer of HKQAA (Right 1).



署理行政长官张建宗先生致开幕辞。  
Mr Matthew Cheung Kin-chung, The Acting Chief Executive of the Hong Kong Special Administrative Region, gives the opening remarks.



本局主席卢伟国议员博士工程师致欢迎辞。  
Ir Dr Hon. Lo Wai Kwok, Chairman of HKQAA gives the welcoming remarks.





## Greater Bay Area Elite Gather to Discuss Development of Green Finance

The Scheme's certified green finance issuers were recognised at the Green Finance Certification Scheme Presentation Ceremony cum Forum. The event promoted a common understanding of green finance and recognised the support provided by professional associations, banking institutions and other organisations in the industry. Senior officials from the Greater Bay Area and experts from renowned international organisations and the financial sector participated in the panel discussions, sharing their insights into developments in green finance projects and discussing the prospects for the Greater Bay Area and the Belt and Road Initiative.

## ISO Standard for Green Debt Instruments to be Released in 2020

Dr Nigel H Croft, Associate Technical Director of HKQAA and Chairman of the ISO Technical Subcommittee on Quality Systems (ISO/TC 176/SC2), introduced the latest developments in the ISO 14030 standard, the first ISO standard for green debt instruments, via video presentation. The standard is expected to be released in 2020. Since 2017, the expert from HKQAA has participated in the related ISO technical committee and directly taken part in the development of this standard.

The ceremony was attended by more than 400 industry leaders and experts. Ir Dr Hon. Lo Wai Kwok, SBS, MH, JP, HKQAA's Chairman, said, "I sincerely hope that today's event can encourage more Hong Kong organisations to participate in environmentally friendly investment and help speed up the pace of development of the green finance market, paving the way to a sustainable future for Hong Kong, our nation and the world."

## Green Fund Certification Scheme, Fintech Rating Services

HKQAA will kick-off the Pilot Programme for the Green Fund Certification Scheme this year to support the Securities and Futures Commission (SFC) in promoting its Strategic Framework for Green Finance. The Scheme aims to encourage more investors from the funds market to support green projects and industries, and organisations committed to making a contribution to the United Nations' Sustainable Development Goals. HKQAA is also developing professional rating services for fintech applications to keep pace with innovations in the financial sector.

## 荟萃大湾区精英 探讨绿色金融发展

为进一步推广绿色金融的理念，本局当日举行绿色金融认证计划颁授典礼暨论坛，表扬参与认证计划的发行机构，并答谢业界组织、专业团体及银行机构的鼎力支持。此外，活动亦同时荟萃大湾区高级官员、国际知名机构与国际财金界的精英及学者，参与专题讨论，探讨绿色金融及绿色项目的国际趋势，以及在大湾区和一带一路的发展。

## 绿色债务工具 ISO 标准料于 2020 年发布

会上，本局技术总监及国际标准化组织质量体系技术委员会 (ISO/TC 176/SC 2) 主席倪国夫博士 (Dr Nigel Croft)，透过短片越洋介绍首个绿色债务工具国际标准 ISO 14030 之最新发展，该标准预计将于 2020 年发布。本局专家于 2017 年已加入 ISO 相关的技术委员会，直接参与制定此国际标准。

活动当日吸引超过 400 名业界领袖及专家聚首一堂，场面热闹。本局主席卢伟国议员博士工程师，SBS, MH, 太平绅士致辞时表示：「我深切希望是次活动能够推动更多机构参与环境友善投资，加快绿色金融市场的发展步伐，为香港、国家及世界创造可持续发展的未来。」

## 将提供绿色基金认证 开发金融科技评级

此外，本局于典礼上宣布今年将启动「绿色基金认证计划」之先导计划，以支持证券及期货事务监察委员会推动绿色金融策略框架。计划锐意鼓励更多基金市场的投资者支持绿色项目和产业，以及为联合国可持续发展目标作出贡献的机构。本局亦正开发金融科技应用的评级服务，以配合金融业界的创新发展。



何志诚工程师 (图左·右) 及黄家和先生 (图右·左) 颁发证书予获认证的绿色金融发行机构代表。

Ir C S Ho (Left photo, right) and Mr Simon Wong Ka Wo (Right photo, left) present certificates to certified green finance issuers.



香港绿色金融协会主席及会长马骏博士 (左图) 及世界银行集团成员国际金融公司东亚及太平洋区营运主管 Ms Julia Brickell (右图) 担任演讲嘉宾。

Guest speakers Dr Ma Jun, Chairman and President, Hong Kong Green Finance Association (Left), and Ms Julia Brickell, Regional Head of Operations, East Asia and the Pacific, International Finance Corporation, a member of the World Bank Group (Right).





一众嘉宾与多间银行机构代表合照，以答谢他们的支持。  
Guests with representatives of banking institutions.



一众嘉宾与参与及计划参与「绿色金融认证计划」的机构代表合照。  
Guests with representatives of the organisations that have participated and planned to participate in the Green Finance Certification Scheme.



财经事务及库务局副局长陈浩濂先生(右图, 左一)、国际资本市场协会董事总经理、亚太区首席代表墨博文先生(Mr Mushtaq Kapasi)(右图, 中)、广州市地方金融监督管理局副局长聂林坤先生(右图, 右一)、中国建设银行(亚洲)有限公司副行长郭志鹏先生(中图, 右一)、广州市花都区区委常委、区政府党组副书记蔡建先生(中图, 左一)及深圳前海管理局副局长何子军先生(中图, 中)参与讨论环节, 团结香港基金社会发展研究主管张博宇先生(左图)担任主持人。



Mr Joseph H L Chan, Under Secretary for Financial Services and the Treasury (Right photo, left 1), Mr Mushtaq Kapasi, Managing Director, Chief Representative of Asia-Pacific, International Capital Market Association (Right photo, middle), Mr Nie Linkun, Deputy Chief of Guangzhou Municipal Local Financial Supervision and Administration (Right photo, right 1), Mr Guo Zhipeng, Deputy Chief Executive of China Construction Bank (Asia) (Middle photo, right 1), Mr Cai Jian, Standing Member of Huadu Guangzhou, Deputy Secretary of CPC of Huadu District (Middle photo, left 1), Mr He Zijun, Deputy Director General of the Authority of Qianhai (Middle photo, middle), participated in the panel discussion. Mr Alvin Cheung, Head of Social Development, Our Hong Kong Foundation (Left photo) was the facilitator.

香港上海汇丰银行有限公司环球银行亚太区基建及地产业务常务总监朱隽贤先生(Mr Jonathan Drew)(左二)、东方汇理银行可持续银行部亚太区主管 Ms Dominique Duval(左三)、中国节能环保(香港)投资有限公司副总经理杨巍先生(右三)、香港城市大学工商管理硕士项目协理主任陈凤翔博士(右二)、澳门城市大学澳门“一带一路”研究中心主任、副教授周平博士(右一)摄于讨论环节, 香港绿色金融协会副会长兼秘书长、法国外贸银行绿色与可持续金融业务执行董事黄超妮女士(左一)担任主持人。

Mr Jonathan Drew, Managing Director of Infrastructure and Real Estate Group, The Hongkong and Shanghai Banking Corporation Ltd (Left 2), Ms Dominique Duval, Head of Asia-Pacific, Sustainable Banking of Crédit Agricole Corporate & Investment Bank (Left 3), Mr Kevin Yang, Deputy General Manager of CECEP (Hong Kong) Investment Co. Ltd (Right 3), Dr Wilson Chan, Associate Director of MBA Programme, City University of Hong Kong (Right 2), Dr Chao Peng, Director, Associate Professor of Macao 'One Belt, One Road' Research Center, City University of Macau (Right 1), joined the panel discussion. Ms Chaoni Huang, Vice President and Secretary General of Hong Kong Green Finance Association, Executive Director of Green and Sustainable Finance Solutions, Natixis (Left 1), was the facilitator.



34 cases have been completed  
已完成 34 個個案

HKQAA  
香港品質保證協會

Green Finance Certification Scheme  
Annual Anniversary Celebration  
慶祝「綠色金融認證計劃」推出一周年

Over 6 billion us dollars' worth of green finance certified  
獲證綠色金融發行總額超過 60 億美元



财经事务及库务局刘局长(中)、副局长陈浩濂先生(左二)、广东省地方金融监督管理局副局长李腾飞先生(左一)、本局主席卢议员(左三)、副主席何工程师(右二)及总裁林博士(右一), 合照于敲锣仪式上, 庆祝计划推出一周年。

Secretary Lau (Middle), Mr Joseph H L Chan, Under Secretary for Financial Services and the Treasury (Left 2), Mr Li Tengfei, Deputy Chief of Guangdong Municipal Local Financial Supervision and Administration (Left 1), Ir Dr Hon. Lo Wai Kwok, Chairman (Left 3), Ir C S Ho, Deputy Chairman (Right 2) and Dr Michael Lam, Chief Executive Officer of HKQAA (Right 1), took a photo in gong-striking ceremony to celebrate the anniversary of the Scheme.







## HKQAA Green Finance Certification Scheme List of Certification

## 香港品质保证局绿色金融认证计划认证名单

(As of 25 Mar 2019 截至 2019 年 3 月 25 日)

Bond 债券	
Name of Certified Issuers 获认证的发行机构名称	Name of Green Finance 绿色金融名称
<b>Pre-Issuance Stage Certificate 发行前阶段证书</b>	
Capital Environment Holdings Limited 首创环境控股有限公司	ISIN: XS1867060722
Century Sunshine Group Holdings Limited 世纪阳光集团控股有限公司	Century Sunshine Green Bond (PS1) 世纪阳光绿色债券 (PS1)
China Everbright Bank Company Limited (Hong Kong Branch) 中国光大银行股份有限公司 (香港分行)	ISIN: XS1866651471
Crédit Agricole Corporate and Investment Bank 东方汇理银行	Green Notes 绿色债券
Industrial Bank Co., Ltd. Hong Kong Branch 兴业银行股份有限公司香港分行	ISIN: XS1898122301
Industrial and Commercial Bank of China (Asia) Limited 中国工商银行 (亚洲) 有限公司	5-Year Floating Rate USD Green Bonds 五年期浮动利率美金绿色债券
Industrial and Commercial Bank of China (Asia) Limited 中国工商银行 (亚洲) 有限公司	2-Year Fixed Rate HKD Green Bonds 两年期固定息率港币绿色债券
Industrial and Commercial Bank of China (Asia) Limited 中国工商银行 (亚洲) 有限公司	3-Year Floating Rate USD Green Bonds 三年期浮动利率美金绿色债券
Link 2019 CB Limited	XS1961891147
Modern Land (China) Co., Limited 当代置业 (中国) 有限公司	XS1775946285
New World China Land Limited 新世界中国地产有限公司	New World China First Green Bond 新世界中国首批绿色债券
Swire Properties MTN Financing Limited	ISIN: XS1743657683
<b>Post-Issuance Stage Certificate 发行后阶段证书</b>	
China Construction Bank Corporation, Hong Kong Branch 中国建设银行股份有限公司香港分行	China Construction Bank Hong Kong Branch's 2018 Sustainability Bond 中国建设银行香港分行 2018 年可持续债券
China Construction Bank Corporation, Luxembourg Branch 中国建设银行股份有限公司卢森堡分行	China Construction Bank Luxembourg Branch's 2018 Green Bond 中国建设银行卢森堡分行 2018 年可持续债券
HKCG (Finance) Limited	Towngas Green Bond HKGMTN1740-10 ISIN: HK0000375300
HKCG (Finance) Limited	Towngas Green Bond HKGMTN1741-10 ISIN: XS1720566790
MTR Corporation (C.I.) Limited	MTRCIGB_HKD_470906 HK0000362761
MTR Corporation (C.I.) Limited	MTRCIGB_HKD_320920 HK0000365228
MTR Corporation Limited	MTRGB_USD_470927 XS1690683211
MTR Corporation Limited	MTRGB_HKD_470717 HK0000352432
MTR Corporation (C.I.) Limited	MTRCIGB_AUD_270628 XS1637858546
<b>Loan 贷款</b>	
Name of Certified Issuers 获认证的发行机构名称	Name of Green Finance 绿色金融名称
<b>Pre-Issuance Stage Certificate 发行前阶段证书</b>	
BW Enterprise Company Limited 百威企业有限公司	BW Enterprise Company Limited Green Loan 2019 百威企业有限公司 2019 绿色贷款
China Everbright Greentech Limited 中国光大绿色环保有限公司	China Everbright Greentech Green Loan 2019
China Oriental Group Company Limited 中国东方集团控股有限公司	ABN & Rabo Green Club Loan
Full Asset Enterprises Limited 满成企业有限公司	New World Development King's Road Commercial Re-development Project Green Loan 新世界发展英皇道商业重建项目绿色贷款
Leo Paper Group Finance Limited 利奥纸品集团财务有限公司	Leo Paper Group 2018 Green Loan 利奥纸品印刷集团 2018 绿色贷款
Megaford Development Limited 万辉发展有限公司	Sino Land Green Loan 2018
On Fat Lung Innovative Resources Limited 安发隆创新资源有限公司	OFL Organization Green Loan 2019-01
RECYCTEX Co., Ltd. 苏州瑞赛科纺织科技有限公司	RECYCTEX Green Loan 2019-1
Win Hanverky Limited 永嘉集团 (香港) 有限公司	Win Hanverky Limited Green Loan Tranche of Loan 2018 永嘉贷款 2018 中之绿色贷款专区专用段落
Xinyi Group (Glass) Company Limited 信义集团 (玻璃) 有限公司	Xinyi Glass Green Finance Program 信义玻璃绿色金融项目
Xinyi Solar (Hong Kong) Limited 信义光能 (香港) 有限公司	Xinyi Solar Green Finance Program 信义光能绿色金融项目
Yip's H C (Holding) Ltd 叶氏恒昌 (集团) 有限公司	Yip's Chemical 2018 Green Loan 叶氏化工 2018 绿色贷款
<b>Post-Issuance Stage Certificate 发行后阶段证书</b>	
NEFIN Holding Limited	NEFIN Green Loan

Remarks 备注:

Listed in alphabetical order 按英文字母排序

\* Taking into account confidentiality considerations in the loan market, green loan applicant may opt to not disclosing Environmental Method Statement on HKQAA website.

\* 考虑到贷款市场中的保密需要, 绿色贷款申请者可以选择仅于香港品质保证局的网站上披露其环境方法声明。

The above list does not cover all the participating organisations due to a particular organisation's wish for non-disclosure.

由于个别参与机构不欲披露机构名称, 因此以上名单并未列出所有参与机构。

Organiser 主办机构



Venue Sponsor 场地赞助



Supporting Organisations 支持机构 (Organisations are listed in no particular order 排名不分先后)





## Support from the Government and Industry 政府及业界支持

### Sharing from The Acting Chief Executive of the Hong Kong Special Administrative Region 香港特别行政区署理行政长官分享

**The Honourable Matthew Cheung Kin-chung, GBM, GBS, JP,  
The Acting Chief Executive of the Hong Kong Special Administrative Region  
香港特别行政区署理行政长官  
张建宗先生, 大紫荆勋贤, GBS, 太平绅士**



The HKSAR Government is determined to develop Hong Kong into a leading hub for green finance in the region, with focus on Mainland China and economies along the Belt and Road economic corridors. By leveraging our strengths and advantages as an international financial centre, we seek to create value through sophisticated professional services and our unparalleled expertise and reputation in the provision of financial services. Indeed, Hong Kong's sound legal and regulatory system, a deep and liquid capital market, robust financial infrastructure and a wealth of financial intermediaries and talent help maximise Hong Kong's potential in developing into a regional green finance hub.

In addition, certification bodies that are well conversant with a spectrum of international, regional and local standards and guidelines will play a more significant role in the green finance development internationally. The HKSAR Government will continue to support the Green Finance Certification Scheme and encourage local, Mainland and overseas enterprises to make use of the Scheme and our capital markets for financing their green projects.

The Scheme provides third-party conformity assessment for issuers on their green debt instruments, with a view to helping our financial sector explore new commercial and business opportunities in the green finance market, promoting a common understanding of green finance and fostering environmentally friendly investments in Hong Kong, the Mainland and worldwide. This echoes well with the policy objective of the HKSAR Government in developing Hong Kong into a premier financing platform for international and Mainland green enterprises and projects.

*(This passage is based on the opening remarks delivered by Mr Matthew Cheung Kin-chung, The Acting Chief Executive of the Hong Kong Special Administrative Region, at the Green Finance Certification Scheme Presentation Ceremony cum Forum 2019.)*

*(节录自香港特别行政区署理行政长官张建宗先生在「绿色金融认证计划颁授典礼暨论坛2019」的开幕辞)*

### Sharing from Certified Green Finance Issuers 获证绿色金融发行机构分享

**Mr Zhang Jun,  
Vice Chairman and Chief Executive Officer of  
China Construction Bank Asia**

HKQAA has developed the Green Finance Certification Scheme with reference to a number of widely recognised international and national standards on green finance, which demonstrates its professionalism. We hope more organisations will participate in the Scheme in the future. The Scheme provides a standardised framework for green finance projects, this can help enhance the credibility of the whole green finance market and attract potential green investors. We hope that we will continue to collaborate with HKQAA in the future, and that more green bond projects will obtain certification from HKQAA.

Green finance is in line with the development of the "Belt and Road" Initiative, which will help enhance the infrastructure and economic development of participating countries and regions, as well as create investment opportunities for commercial financing. It is believed to attract more investors from around the world. We recommend that organisations intending to issue green bonds overseas establish a clear position and create a concrete vision for their green development plan, green bonds should be seen as a long-term development of the organisation, but not as a short-term financing strategy. In addition, it is better to increase the interaction and understanding with green investors in a proactive manner and more open approach to enhance confidence of their investors.

**中国建设银行(亚洲)  
副董事长及行长  
张骏先生**



香港品质保证局在制定「绿色金融认证计划」的过程中,参考了多个国际及国家规范和标准,充份体现了其专业性,希望未来有更多机构申请绿色债券认证。计划给绿色金融项目提供了一个标准化的框架,有助提高整个绿色金融市场的公信力,吸引更多潜在绿色投资者。期望未来继续与香港品质保证局合作,且日后有更多绿色债券项目能得到该局的认证。

绿色金融切合「一带一路」的发展里程,有助提升参与国家的基础建设和经济水平,以及创造许多商业融资的投资机遇,相信能吸引全球投资者的目光。我们建议有意到境外发行绿色债券的机构,不要视绿色债券为短期融资策略,而是作为公司长远发展的规划,就机构的绿色发展确立清晰的定位和明确的理念。此外,最好以主动公开的方式增加与绿色投资者的互动及了解,提升投资者的信心。





### Mr Chen Xian, Assistant Chief Executive, Industrial Bank Co., Ltd. Hong Kong Branch

The Green Finance Certification Scheme has helped Industrial Bank to get China's green bonds connected to international trends. It has also fostered the interconnection of green assets and capital inside and outside the region. For investors, the Scheme attracts international capital, especially from responsible investors. For financiers, the Scheme expands the financing channels for green finance projects and green enterprises in China, and enables the flow of green credit assets in the banking industry. It can support the development of Hong Kong into a green finance centre in the Greater Bay Area in the long term.

As the first bank adopting Equator Principles in China, Industrial Bank has accumulated ample experience in managing environmental and societal risks. We suggest that enterprises build up a green brand through green projects to gain recognition in the market. Green bonds issued by Industrial Bank have received favourable responses by investment clients. Apart from establishing communication with advanced international green development projects, the Bank has attracted a group of international clients who are interested in investing in China's green projects.

We suggest that financial institutions interested in issuing offshore green bonds take the classification and screening of their assets seriously, while also optimising mechanisms, such as the approval process, environmental efficiency evaluation and information disclosure. They should choose third-party certification bodies that have high credibility and are well recognised by the market, such as HKQAA. These bodies certify green bonds and provide comprehensive services for the duration of the bonds, thereby increasing the confidence of socially-responsible and green investors, and fostering the development of the green bond market.

### Mr Michel Roy, Senior Regional Officer for Asia-Pacific, Crédit Agricole Corporate and Investment Bank

Sustainable development has become a key development strategy in today's business. In recent years, Crédit Agricole Corporate and Investment Bank has promoted and participated actively in financial activities which have benefitted society and the environment. Our Green Bond Framework established in 2014 has gained HKQAA's Pre-issuance stage certificate in 2018, which helped attract more potential investors.

Mainland China and Hong Kong together constitute one of the largest green bond markets in the world, according to 2018 data. Many overseas and Mainland organisations have chosen to issue green bonds in Hong Kong, which has become a pivotal green finance centre. It will help enhance stakeholders' confidence if issuers undertake third-party conformity assessment conducted by HKQAA. I believe that in order to attract more international investors to participate in green bonds in the Asia-Pacific region, the issued bonds must be disclosed and reported with greater transparency, and demonstrate the importance of the core value of integrity.

### 兴业银行股份有限公司香港分行 行长助理陈先生

兴业银行申请「绿色金融认证计划」，有助中国绿色债券与国际接轨，促进境内外绿色资产、资金的互联互通。对投资者而言，吸引国际资本特别是责任投资者的关注；对融资者而言，扩大中国绿色项目及绿色企业的融资渠道，创造银行业绿色信贷资产的流转通道；长远也有利帮助香港打造成大湾区绿色金融中心。

兴业作为中国首家赤道银行，在环境与社会风险管理方面已累积丰富经验，提议企业通过绿色项目建立绿色品牌，争取市场认受性。现时兴业银行发行的绿色债券已取得投资客户的广泛回应，除了与国际先进绿色发展项目建立沟通机制外，银行亦吸纳了一群投资中国绿色项目的国际客户。

我们建议有意到境外发行绿色债券的金融机构，首先要认真做好项目资产的分类和筛选，优化项目审批、环境效益预算、资料披露等机制；其次在债券发行和存续期管理过程中，选择具公信力、市场认受性高的第三方认证机构如香港品质保证局，对债券出具绿色标签，对存续期披露进行全程服务，藉以提升全球绿色和社会责任投资者的信心，共同促进绿色债券市场的发展。



### 东方汇理银行 — 亚太区高级区域总监 华敏智先生

可持续发展现已成为不少企业的核心发展战略，东方汇理银行近年亦积极推动并参与对社会和环境有正面影响的金融活动，2014年制定的绿色债券框架，亦在2018年到香港品质保证局的「发行前阶段证书」认证，有助吸引更多潜在绿色金融投资者。

2018年的数据显示，中国/香港是全球最大的绿色债券市场之一，许多中国内地和海外机构亦选择在香港发行绿色债券。显而易见，香港已成为非常重要的绿色金融中心，若取得香港品质保证局的第三方合格评定，更有助提升持份者信心。倘企业欲吸引更多国际投资者在亚太地区参与绿色金融投资，所发行的绿色债券必须加强披露及汇报，提高市场透明度，重视廉洁的核心价值。







**Ms Ellie Tang, Head of Sustainability,  
New World Development Company Limited**

In 2018, with reference to the Green Bond Principles and Green Loan Principles, New World Development developed a strategic framework for green finance to support our new and existing properties in obtaining certification from environmental building assessments and increasing energy efficiency. In March 2018, New World Development applied for a green loan under the framework to finance a green redevelopment project in King's Road, North Point. In November 2018, we issued green bond for projects in Zengcheng, Guangzhou and Qianhai, Shenzhen for the first time.

The green commercial redevelopment project in King's Road, North Point has attained the world's first WELL Building Standard Pre-certification (Platinum), as well as BEAM Plus New Building Version 1.2 (Provisional Platinum) and LEED Building Design and Construction Core and Shell Version 2009 Pre-certification (Platinum). In the Guangzhou and Shenzhen projects, apart from obtaining several green building certification labels, we also considered the environment and water management when implementing energy-saving initiatives. For example, indoor flushing water will be recycled through a rain water collection and sewage cleaning system. This has reduced indoor water usage by 40%.

In 2018, New World China Land Limited, a company in the New World Group, issued its first batch of green bond certified by HKQAA. We are pleased that the issuance was certified and supported by HKQAA, which has been doing better and better in its certification work in green loans and bonds.

As green finance is a new topic in Hong Kong, we need to introduce the concept of environmental protection to our staff members, as well as explain it to the financial institutions to increase their awareness of green finance. We have found that when we run road-shows around the world, investors from foreign countries are not familiar with the Hong Kong green finance situation. Luckily, clear guidelines have been provided by the third party certification organisation, HKQAA, to enhance our investors' confidence.

**新世界发展有限公司  
可持续发展主管邓业炜女士**



新世界发展早于2018年参考《绿色债券原则》及《绿色贷款原则》，制定「绿色金融框架」，支持新建及现有物业取得建筑环保认证，提升能源效益水平。2018年3月，新世界发展在绿色金融框架下申请绿色贷款，为北角英皇道一个商业重建项目进行融资，而11月就首次为广州增城及深圳前海项目发行绿色债券。

北角项目为全球首个获得美国绿色建筑认证委员会颁发的WELL建筑铂金级预认证建筑项目，以及获得香港《绿建环评》(BEAM Plus)新建建筑1.2版暂定铂金级及美国《领先能源与环境设计》LEED核心及外壳组别2009版铂金级预认证。至于广州及深圳项目，除了取得多个环保建筑标签的认证外，在实施节能措施方面会考虑当地环境及水资源管理。举例室内冲厕水会通过雨水收集及污水洁净系统循环再用，此举成功为室内减少高达40%的用水。

集团旗下的新世界中国地产有限公司发行的首批绿色债券，2018年获得香港品质保证局的认证，推出首批债券。今次发行首批债券项目，得到香港品质保证局认证和支持的同时，我们亦看到该局在贷款和债券方面的绿色认证工作做得愈来愈好。

绿色金融在香港是一个新课题，对内需要向同事介绍绿色环保概念；对外需要向金融机构详细讲解以提升意识。同时，在海外不同国家进行路演时，当地投资者也不太熟悉香港绿色金融情况，幸好得到第三方机构香港品质保证局提供清晰客观的认证准则，得以加强投资者的信心。

**Sharing from the Industry 业界分享**

**Mr Jonathan Drew,  
Managing Director, Infrastructure and Real Estate Group;  
Ms Luying Gan,  
Head of Sustainable Bonds, Debt Capital Markets, Asia-Pacific,  
The Hongkong and Shanghai Banking Corporation Limited**

People must consider the environmental and societal impact of economic development. To align with the 17 Sustainable Development Goals set out by the United Nations 2030 Agenda for Sustainable Development, the Belt and Road Initiative should strike a balance between economic growth, inclusiveness and environmental protection instead of just letting a part of the population along the route get rich. This is an opportunity to improve everyone's life and environment, as well as achieve the sustainable development of our society. HKQAA's Green Finance Certification Scheme plays an important role in providing assessment which ensures that economic projects conform to green and sustainable goals based on a standardised framework.

To minimise the adverse impact of economic development on the environment, it is important that development under the Belt and Road Initiative is carried out appropriately with green projects that are adapted to different countries' situations. For example, countries may focus on distributed electrical energy generation from renewable resources including waste rather than traditional centralised generation from fossil fuels, high density smart urban development supported by mass transit mobility systems, circular consumption and food systems that avoid emissions and resource destruction while being robust and healthy. The HKQAA certificate will give funders confidence that they are supporting such sustainable development.

**香港上海汇丰银行有限公司  
环球银行亚太区基建及地产  
业务常务总监朱凭贤先生、  
亚太区债务资本市场可持续  
发展债券主管甘露颖女士**



人类在发展经济、创造财富的同时，必须考虑对环境及社会的影响。正如联合国《2030年可持续发展议程》所定下的17个可持续发展目标那样，「一带一路」的项目不能只让沿路国家的一部分人富起来，而是需要全面促进经济增长、社会包容和环境保护，改善全体人民的生活和环境，达至社会的可持续发展。当中，香港品质保证局的「绿色金融认证计划」发挥了重要作用，为评估经济项目是否符合绿色和可持续目标提供了标准化的框架。

我们意识到工业发展对环境的影响，因此希望在发展绿色「一带一路」过程中因地制宜，根据不同国家的情况和环境资源设计合适的绿色项目，例如一些国家可重点使用废物等可再生资源作分散式发电，而不只是采用化石燃料作传统集中式发电；亦可透过大型交通运输系统、循环消耗及粮食系统，支持高密度的智慧城市健康及稳定地发展，同时避免碳排放和破坏资源。香港品质保证局的证书可给予投资者信心去支持这些可持续发展的项目。





### Ms Chaoni Huang, Vice President and Secretary General, Hong Kong Green Finance Association; Executive Director, Green and Sustainable Finance Solutions, Natixis

More attention is being paid to green finance, and green investments have been increasing around the globe. International investors are increasingly demanding with regard to green finance services. Taking green bonds as example, investors are demanding more stringent requirements in areas such as transparency, management methods and tracking reports. The 13<sup>th</sup> national Five-Year Plan noted that the national demand for investment in green industries is 3 to 4 trillion yuan, and data from the Organisation for Economic Co-operation and Development (OECD) show that demand in the countries along the Belt and Road is 1.5 trillion USD each year. These statistics show that there is an enormous demand for green investments in the region, and as an international financial centre Hong Kong has an advantage in developing green finance. The Green Finance Certification Scheme has been developed with reference to a number of widely recognised international and national standards. It can enhance the credibility of, and stakeholder confidence in, green financial instruments via independent, impartial third-party conformity assessments, thereby providing an efficient and time-saving issuance process.

### 香港绿色金融协会副会长兼秘书长、法国外贸银行绿色与可持续金融业务执行董事黄超妮女士

全球对绿色金融的关注及投资日益增加，国际投资者对绿色金融的要求亦愈来愈高。以绿色债券为例，投资者对绿色债券的属性、透明度、管理办法及日后的跟踪报告等等都有很高要求。

对于内地绿色金融发展情况，中国「十三五」规划提及国内绿色产业需求为三至四万亿元人民币，而据经济合作及发展组织 (OECD) 数据显示，「一带一路」沿线国家需求为每年 1.5 万亿美元，可见绿色需求十分之庞大。香港作为国际金融中心，发展绿色金融具优势。而由香港开发的「绿色金融认证计划」，制定过程参考了多个国际及国家的规范和标准，有助发行人提升绿色金融的公信力，增加投资者信心，提高发行效率及减低时间成本。



## Sharing from the Panelists 客席讲者分享

### Mr Cai Jian, Standing Member of Huadu Guangzhou, Deputy Secretary of CPC of Huadu District

The strategic collaboration between the Bureau of Financial Affairs, Huadu, Guangzhou and HKQAA is expected to foster economic development between Guangzhou and Hong Kong in several ways. Firstly, by motivating developments in green finance, enterprises in Huadu can issue green bonds in Hong Kong and accumulate financing experience in green projects. Secondly, by studying the development of green finance, enthusiastically putting corporate social responsibility into practice and enhancing environmental, social and governance performance, we can improve the recognition of China's green finance in the international market. Thirdly, capitalising on Hong Kong's status as an international finance hub, we can nurture professionals, bring synergistic effects to the Guangzhou-Hong Kong-Macau green finance industry, and strengthen its professionalism. We believe the MOU signing with HKQAA can expand and strengthen the collaboration between the regions in the area of green finance, and assist in building up Guangzhou's green finance reform and innovation pilot zone.

### 广州市花都区委常委、区政府党组副书记蔡建先生

广州花都区金融管理局与香港品质保证局的策略性合作，期望有效促进粤港经济发展。第一是推动绿色金融发展，让花都区的企业可以借助香港发行绿色债券，为绿色项目累积融资经验；其次是粤港共同研究绿色金融产业的发展路向，积极实践企业社会责任、提升环境、社会和管治水平，加强国际市场对中国绿色金融的广泛认同；第三是通过香港国际金融中心的地位，培养专业人才，有助加强整个粤港澳绿色金融产业的协同效应及专业地位。希望透过与香港品质保证局签订的合作备忘录，拓展及加强两地在绿色金融发展方面的合作，协助建设广州市绿色金融改革创新试验区。



### Mr Kevin Yang, Deputy General Manager, CECEP (Hong Kong) Investment Co., Ltd.

The Green Finance Certification Scheme has become a major impetus to the development of the market. The strategic collaboration between HKQAA and CECEP, and their promotion work, has effectively increased awareness of green finance in the market. From the investor's perspective, the Scheme enhances confidence in green financial instruments and promotes understanding of the ongoing performance of green projects. Investors are able to identify certified green debt instruments and so make wiser investment choices. From the bank's perspective, a standardised green finance certification system and a mature capital market will speed up the pace of development of the green finance market in Hong Kong.

As an international financial centre, Hong Kong plays an important role in the Belt and Road Initiative. Apart from having enough professionals, comprehensive infrastructure and good governance, Hong Kong is also actively supported by our nation. It is believed that a healthy green finance system will encourage more international investors to participate in infrastructure projects, and more new capital will flow into Hong Kong. Enterprises that plan to finance green projects under the Belt and Road Initiative can choose to support green projects with great potential so as to enhance investor confidence.

### 中国节能环保(香港)投资有限公司副总经理杨巍先生

「绿色金融认证计划」为整体市场带来巨大动力。香港品质保证局与中节能的策略性合作和推广工作，有效提升市场对绿色金融的认识。从投资者角度，计划增加投资者对绿色投资产品的信心，以及了解绿色项目的持续表现。让投资者较容易在市场中识别出已认证的环保债务工具，从而作出明智的选择；从银行角度，标准化的绿色金融认证体系及成熟的资本市场，可加快香港绿色金融市场发展的步伐。香港作为国际金融中心，在「一带一路」中扮演重要的角色。除了人才充裕、基建完善、法治良好外，亦得到国家积极支持，相信健全的绿色金融体系将为基础设施项目带来国际投资者，吸引新的资本进入。此外，我们建议有计划为「一带一路」绿色项目融资的企业，可选择较有潜力的绿色项目予以申请，以加强投资者的信心。





# Development of the ISO 14030 Standards for Green Debt Instruments ISO 14030 绿色债务工具标准的发展

**Dr Nigel H Croft**  
Associate Technical Director, HKQAA  
Chairman, ISO Technical Subcommittee on Quality Systems (ISO/TC 176/SC2)  
**倪国夫博士**  
香港品质保证局技术总监  
国际标准化组织质量体系技术委员会 (ISO/TC 176/SC2) 主席



## Introduction

The World Bank has estimated that trillions of US dollars of investment in global infrastructure will be needed in order to promote a more sustainable future for our planet. While much investment in so-called “green projects” is already taking place, investors need to be encouraged to do more. Over the past ten years, a new type of investment product has emerged known as the “green bond”, providing vital finance for sectors such as renewable energy, low-carbon buildings and transportation, energy efficiency, waste minimisation, sustainable agriculture and climate change adaptation.

A “green bond” is typically a loan whereby the lender receives a fixed return over a specified time period, after which the loan is repaid in full. The World Bank first used the term in 2008 when it launched its Strategic Framework for Development and Climate Change. Since that time, the green bonds market has grown substantially and, according to the Climate Bonds Initiative, financial institutions issued about USD 155.5 billion in green bonds during 2017 alone. There is, however, still confusion and obfuscation about what actually constitutes a “green bond”, and issuers have been able to choose from a variety of different frameworks for substantiating their green bond claims.

It was within this context that in 2017 the ISO Technical Committee for Environmental Management (ISO/TC 207) established a working group to develop a series of standards to promote a common understanding and methodology with the aim of providing greater clarity, consistency and transparency about green debt instruments.

## Rationale for ISO 14030

For responsible investors and other stakeholders, bonds designated as “green” are used to allocate funds exclusively towards projects, assets or activities that can result in environmental benefits such as aligning with global climate goals and conserving natural resources while mitigating potential negative social side effects.

Confidence in the information provided about the net environmental impact or performance of assets is important to investors and other stakeholders. At the pre-issuance stage investors want to know that an issuer has followed an appropriate process for designating a bond as green and that the eligible projects, assets or activities have the potential to deliver positive environmental outcomes. After green bonds have been issued, investors seek confirmation that the net proceeds have been allocated to eligible green projects via credible verification schemes.

The following core components of the process for issuing and managing a green bond have already been defined within the Green Bond Principles (GBP):

- 1) Use of proceeds
- 2) Process for project evaluation and selection
- 3) Management of proceeds
- 4) Reporting
- 5) External review

## 简介

世界银行估计，全球基础设施需投入数万亿美金的资金，才可为世界缔造一个更可持续发展的未来。纵使投资者已对「绿色项目」投放了大量资金，我们仍要鼓励他们继续投资。过去十年，「绿色债券」作为一款新兴的投资产品，为可再生能源、低碳建筑和运输、能源效益、减少废物、可持续发展农业及适应气候变化等提供了重要的融资渠道。

一般而言，「绿色债券」的贷款人会在一定年期内获得固定回报，其贷款往后亦会全额偿还。世界银行于2008年推出气候转变和发展的策略性框架时首次使用此用语，自此，绿色债券市场大幅增长，根据气候债券倡议组织的数字，金融机构单单在2017年已发行了约1,555亿美元的绿色债券。然而，何谓「绿色债券」，至今仍缺乏广泛共识，发行人可选择不同的框架去描述其绿色债券声明。

在此背景下，国际标准化组织环境管理技术委员会 (ISO/TC 207) 于2017年成立了工作小组，制定一系列有关绿色债务工具的标准，推广一套共同理念及方法，提高其一致性、清晰度及透明度。

## 制定 ISO 14030 的原因

对负责的投资者及其他持分者来说，「绿色」的债券是专为具有环境效益的项目、资产或活动提供资金的债券，其效益包括与全球气候目标相符，有助保护自然资源，同时减低对社会的潜在负面影响。

投资者及其他持分者十分重视有关资产的净环境影响或表现的资料的可靠性。绿色债券发行前，投资者都希望能知悉发行人有否按照适当的程序来界定其债券为绿色债券，相关的合资格项目、资产或活动是否具潜力带来环境效益。债券发行后，投资者往往亦想确认募集的净资金是否已分配至合资格的绿色项目，并通过可信的核查计划。

以下是根据《绿色债券原则》指引中列明发行及管理绿色债券时所涉及的核心要素：

- 1) 募集资金用途
- 2) 项目评估与筛选流程
- 3) 募集资金的管理
- 4) 报告
- 5) 外部审核

ISO 14030 进一步扩展这些原则，为绿色债务工具的发行和核查提供了具体要求和指引，预期可在市场上订立明确的标准，提高被界定为「绿色」债务工具的公信力。为实现这个目标，ISO 14030 列明有关项目、资产





ISO 14030 expands on these principles to provide specific requirements and guidance for the issuance and verification of green debt instruments. The intended result is to provide clarity in the marketplace and improve the credibility of debt instruments designated as green. This is achieved by setting requirements for the allocation of funds to projects, assets or activities and reporting requirements on the results of expected impacts.

### Overall ISO 14030 Structure and Content

After initial work conducted in late 2017 and 2018, the numbering and focus of the 4 parts of ISO 14030 have been agreed as follows:

- ISO 14030-1 Green debt instruments - Process for green bonds
- ISO 14030-2 Green debt instruments - Process for green loans
- ISO 14030-3 Green debt instruments - Taxonomy
- ISO 14030-4 Green debt instruments – Verification

The ISO 14030 series of standards is still in the relatively early stages of development, with ISO 14030-1 being the most advanced (at the 2nd committee draft stage) and ISO 14030-2 still only at the working draft stage. Significant changes may therefore be introduced before their final publication. ISO 14030 Parts 1, 3 and 4 are scheduled for publication by the end of 2020, whilst Part 2 is only likely to be finalised by early 2021.

### ISO 14030-1 (Process for green bonds)

This standard will provide the key principles, requirements and guidance for designating bonds as “green”, for selecting projects, assets or activities, for managing proceeds, and for defining, measuring and reporting on their environmental impacts. It can be applied by any issuer of bonds. In addition to providing a number of relevant definitions related to green bonds, it specifies the process steps for designating a bond as green, including the identification of appropriate performance indicators.

The definitions include terms related to debt instruments, to the environmental objective and performance of projects, assets or activities and terms related to performance evaluation. A “green bond” is formally defined as “a bond whose proceeds will be exclusively applied to finance or re-finance in part or in full new or existing eligible projects, assets or activities”.

ISO 14030-1 describes the requirements on green bonds, highlights include:

#### Principles on which the issue of green bonds should be based

- |                     |                  |
|---------------------|------------------|
| - Transparency      | - Accuracy       |
| - Completeness      | - Relevance      |
| - Robustness        | - Accountability |
| - Fair and balanced | - “Do-no-harm”   |

#### Eligibility criteria for the use of proceeds

- Requires that all eligible projects, assets or activities must positively contribute to at least one environmental objective, and any negative environmental impacts must be managed and mitigated to avoid unacceptable adverse impacts on other environmental objectives
- Provides examples of typical environmental objectives
- Defines the process for evaluation and selection of projects, assets or activities and eligibility test
- Prescribes requirements for disclosure to investors

#### Management of proceeds

- Requires allocation of all net proceeds to eligible projects, assets or

或活动分配资金的要求，以及报告预期影响之结果的要求。

### ISO 14030 的整体架构及内容

工作小组于 2017 年底及 2018 年展开初期工作后，ISO 14030 四个部分的排序及焦点已达成共识如下：

- ISO 14030-1 绿色债务工具 - 绿色债券流程
- ISO 14030-2 绿色债务工具 - 绿色贷款流程
- ISO 14030-3 绿色债务工具 - 分类
- ISO 14030-4 绿色债务工具 - 核查

ISO 14030 系列的标准仍处于相对早期的开发阶段，当中 ISO 14030-1 的进展最快(处于委员会第二次起草阶段)，ISO 14030-2 则处于起草工作阶段。所以，在 ISO 14030 标准最后发布前，或会有重大变更。ISO 14030 第一、三及四部分计划于 2020 年底发布，而第二部分或于 2021 年初完成。

### ISO 14030-1 (绿色债券流程)

此标准为「绿色」债券的界定提供了关键原则、要求及指引，用以筛选项目、资产或活动；用以管理资金；以及用以定义、衡量及报告其对环境的影响，并适用于所有债券发行人。除了提供一些与绿色债券相关的定义之外，此标准还具体说明了将债券界定为绿色债券的流程步骤，包括识别合适的绩效指标。

这些定义包括有关债务工具、绩效评估及项目、资产或活动的环境目标和表现的用语。「绿色债券」的正式定义为「部分或全额融资或再融资的债券，其所募集的资金，只用于全新或现有合格的项目、资产或活动中」。

ISO 14030-1 列出了对绿色债券的要求，重点内容包括：

#### 发行绿色债券的原则

- |        |        |
|--------|--------|
| - 透明度  | - 准确性  |
| - 完整性  | - 相关性  |
| - 稳健性  | - 责任承担 |
| - 客观公正 | - 无伤害性 |

#### 募集资金用途的准则

- 所有合格的项目、资产或活动必须具有至少一个环境效益目标，并有能力管理和减轻任何对环境构成的负面影响，以及避免对其他环境目标产生不可接受的不利影响
- 提供一般环境目标的示例
- 定下评估与筛选的项目、资产或活动流程，以及审查资格的流程
- 规定向投资者披露资料的要求

#### 募集资金管理

- 于一定时间内或尽快于可行时间内(必须于绿色债券到期前)，向合格的项目、资产或活动分配所有募集的净资金
- 涵盖追踪资金及管理未分配资金的要求





activities within certain period of time or as soon as practicable but before maturity of the good bond

- Includes requirements for tracking of proceeds and how to manage unallocated proceeds

**Environmental performance**

- Includes requirements on impact assessment, including the evaluation of relevant environmental aspects and associated risks, as well as environmental indicators

**Reporting**

- Includes requirements for reporting before and immediately after bond issuance, as well as ongoing reporting requirements which must be provided at least annually

**ISO 14030-2 (Process for green loans)**

Despite the apparent similarity of approach, there can be significant differences between green loans and green bonds. Whilst the issuers of green bonds tend to be large corporations, municipalities and governments, the green loan market is typically divided into wholesale loans aimed at large corporate organisations and retail loans, where the borrowers may be hundreds of small and medium-size enterprises (SMEs) or even thousands of individuals. Assigning responsibilities in the retail green loan market can therefore be a challenge.

ISO 14030-2 will follow broadly the same principles as ISO 14030-1, but its structure will be slightly different, with distinctions being made for the various responsibilities of wholesale and retail borrowers and lenders.

**ISO 14030-3 (Taxonomy)**

This standard deals with the classification (“taxonomy”) of eligible investment projects, including categories that:

- are green “by default” (e.g. wind, marine, tidal and solar energy power plants)
- are green by meeting category qualification (e.g. renewable energy power plants)
- pass a process test with screening criteria such as:
  - o Climate change mitigation
  - o Biodiversity
  - o Waste minimisation
  - o Climate adaptation
  - o Water resource management
  - o Pollution prevention and control

**ISO 14030-4 (Verification)**

This final part of ISO 14030 provides requirements for verification scheme owners and conformity assessment bodies such as HKQAA. The standard requires verification to be carried out prior to the issue of the green debt instrument and at least one post-issuance verification engagement.

The requirements refer to ISO 14065 (Requirements for bodies verifying and validating environmental information) and ISO/IEC 17030 (General requirements for third party marks of conformity), for those verification scheme operators who choose to issue marks of conformity (e.g. labels).

**Conclusions**

The ISO 14030 standards will deliver three major benefits. They will provide a very clear global definition about what constitutes a green bond or a green loan. They will provide a classification of the various assets and projects that can be financed by green debt instruments, and describe verification requirements to enhance investor confidence. The standards are scheduled for publication in late 2020 / early 2021.

**环境绩效**

- 涵盖对评估影响的要求，包括有关环境、其相关风险，以及环境指标的评估

**报告**

- 涵盖对债券发行前及发行后立即报告的要求，以及至少每年必须定期报告的要求

**ISO 14030-2 (绿色贷款流程)**

尽管发行绿色贷款及绿色债券的做法十分相似，但两者亦有显著差异。绿色债券的发行人往往是大企业、市政府及政府，而绿色贷款市场通常分为两类 — 批发贷款及零售贷款，当中前者的对象为大企业，后者的对象为数以百计的中小型企业，甚至是数千人。所以，在零售绿色贷款市场中分配各持分者应有的责任，无疑是一项挑战。

ISO 14030-2 的原则大致上将 ISO 14030-1 相同，但其架构略有不同，它会对批发及零售的借款方及贷款方的各自责任进行区分。

**ISO 14030-3 (分类)**

此标准说明了合资格投资项目的类别(分类)，包括以下范畴：

- 「预设」为绿色的项目(如风力、海洋能、潮汐能及太阳能发电厂)
- 符合所需资格的绿色项目(如可再生能源发电厂)
- 通过筛选准则的项目，如：
  - o 减缓气候变化
  - o 气候适应
  - o 生物多样性
  - o 水资源管理
  - o 尽力减废
  - o 预防及控制污染

**ISO 14030-4 (核查)**

ISO 14030 的最后部分列出了对核查计划持有者及合格评定机构(如香港品质保证局)的要求。此标准要求发行绿色债务工具前进行核查，并于发行后执行至少一次核查工作。

执行核查计划的机构如要签发符合性标志(如标签)，其签发要求可参考 ISO 14065(对核查及审定环境资讯的机构之要求)及 ISO/IEC 17030(第三方符合性标志的通用要求)。

**总结**

ISO 14030 标准将带来三大好处：将对绿色债券或绿色贷款有非常明确的统一界定，并对一系列经绿色债务工具融资的资产及项目进行分类，以及列出核查的要求，增强投资者信心。是次标准预计于 2020 年末或 2021 年初出版。



## MOU Signed with GuangDong Financial Association 与广东省民营企业金融服务协会签署合作备忘录

The Guangzhou Branch of HKQAA Certification (Shanghai) Ltd, a subsidiary of HKQAA, signed a Memorandum of Understanding (MOU) with the GuangDong Financial Association on 26<sup>th</sup> March, 2019. The Guangzhou Branch will follow the "Rating Standard for Lending Information Intermediary Institutions" to provide assessment services for financial service providers in the Greater Bay Area.

The MOU was signed by Dr Michael P H Lam, Chief Executive Officer of HKQAA (Front row, left), and Ms Huang Miao-ying, Executive Secretary of the GuangDong Financial Association (Front row, right). Mr PC Chan, Chief Operating Officer of HKQAA (Back row, left), and Mr Huang Xiao-hui, General Secretary of GuangDong Financial Association (Back row, right), witnessed the signing.

The new strategic cooperation between the two organisations will foster the healthy development of the financial sector in the Greater Bay Area. It will also utilise the strengths of both parties to support professional assessments for the financial services, enhancing the credibility and competitiveness of the industry and contributing to the economic development of the Area.



香港品質保證局附屬機構標準認證服務(上海)有限公司之廣州分公司，於2019年3月26日與廣東省民营企业金融服務協會簽署合作備忘錄，依照《借貸信息中介服務機構評級標準》為大灣區金融服務企業進行評定工作，結合雙方的專業優勢，提升金融服務企業客戶的公信力及競爭力。

本局總裁林寶興博士(前排左一)與廣東省民营企业金融服務協會執行會長黃妙英女士(前排右一)，代表雙方簽署合作備忘錄。本局運營總監陳沛昌先生(后排左一)及廣東省民营企业金融服務協會秘書長黃曉輝先生(后排右一)共同見證是次簽署儀式。

相信這次策略性合作，能夠促進大灣區金融服務業的健康發展，充份發揮雙方在支持金融服務業評定的重要角色，為大灣區的發展作出貢獻。



Welcome on Board

迎新天地

## Memorable Moments 紀念一刻

Since 1989, Hong Kong Quality Assurance Agency (HKQAA) has been helping industrial and commercial bodies to develop effective management systems and good practices so that they can achieve their organisational and business goals.

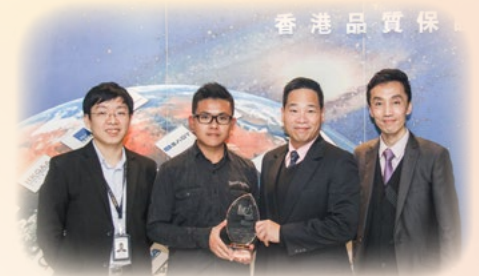
From November 2018 to January 2019, we have been pleased to welcome various organisations to our community. They have obtained the following certificates: 5S, GFCS-PRE, GFCS-POST, HACCP, HCS, ISO 9001, ISO 22000, ISO 22301, ISO 22716, ISO 14001, ISO 45001, OHSAS 18001, QSPSC, SA 8000, SQM and US FDA GMPC. Additionally, we have also presented KOL Favored Brand Award to recognise the awarded organisations.

We believe the new members will contribute to the overall success of the brand that prides itself on adding value to stakeholders.

香港品質保證局自1989年成立以來，致力協助工商界實施管理体系及良好做法，有效地達至机构和营商目标。

由2018年11月至2019年1月期間，香港品質保證局共頒發多張證書，包括5S、GFCS-PRE、GFCS-POST、HACCP、HCS、ISO 9001、ISO 22000、ISO 22301、ISO 22716、ISO 14001、ISO 45001、OHSAS 18001、QSPSC、SA 8000、SQM及US FDA GMPC。此外，亦頒授「網絡紅人喜愛品牌獎」表揚得獎的商戶；在此謹祝賀獲證機構加入我們的行列。

本局深信，新成員的加入將可為我們的品牌和持份者帶來更大的裨益。





Course Title 课程名称	Duration (Day) 课程长度 (天)	Fee (per head) HKD 收费 (每人) 港币	Course Code & Date 课程编号及日期			
			May 五月	Jun 六月	Jul 七月	Aug 八月
<b>Quality and Integrated Management Systems 质量和综合管理</b>						
ISO 9001:2015 QMS - Understanding & Application ISO 9001:2015 质量管理体系 - 理解与应用 (U&A)	1	HKD 1,580	VM1C/HK-05A 09	VM1C/HK-06A 03	VM1C/HK-07A 05	VM1C/HK-08A 02
ISO 9001:2015 QMS - Internal Auditor Training ISO 9001:2015 质量管理体系 - 内部质量管理体系审核员培训	2	HKD 3,300	VM3C/HK-05A 14-15	VM3C/HK-06A 13-14	VM3C/HK-07A 29-30	VM3C/HK-08A 26-27
CQI & IRCA Certified ISO 9001:2015 QMS Lead Auditor ISO 9001:2015 质量管理体系 - 主任审核员证书培训课程 (CQI & IRCA 认可)	5	HKD 9,800/ HKD 9,300*		QMS/IRCA/06 17-21		
ISO 9001:2015 QMS Lead Auditor ISO 9001:2015 质量管理体系 - 主任审核员证书培训课程	5	HKD 5,800/ HKD 5,300*		QMS/LA/06 10-14		QMS/LA/08 Aug
ISO 9001:2015 QMS Lead Auditor Transition Course (IRCA Approved) ISO 9001:2015 质量管理体系 - 主任审核员转版课程	2	HKD 4,800/ HKD 4,300*		QM06E/HK-06A 20-21		
The Must-know Essentials for QMS Representative 质量管理体系 - 管理者代表重要须知	1	HKD 1,680/ HKD 1,580*				MT23C/HK-08A 09
ISO 9001:2015 QMS Documentation ISO 9001:2015 质量管理体系文件	1	HKD 1,680/ HKD 1,580*				QMS4C/HK-08A 14
Understanding and Application of an Integrated Management System (IMS) 整合管理体系 (IMS) 的理解与应用	2	HKD 3,500/ HKD 3,300*			IMS5C/HK-07A 16-17	
Integrated Management Systems (IMS) Set Up & Audit Approach 整合管理体系 (IMS) 的设置及审核	2	HKD 3,500/ HKD 3,300*			IMS2C/HK-07A 16-17	
<b>Sustainability (Environmental and CSR) 可持续发展 (环境与企业社会责任)</b>						
ISO 14001:2015 EMS - Understanding & Application ISO 14001:2015 环境管理体系 - 理解与应用	1	HKD 1,730/ HKD 1,630*	EMS2C/HK-05A 10	EMS2C/HK-06A 06	EMS2C/HK-07A 16	EMS2C/HK-08A 06
ISO 14001:2015 EMS - Internal Auditor Training ISO 14001:2015 环境管理体系 - 内部环境管理体系审核员培训	2	HKD 3,400/ HKD 3,300*	EMS3C/HK-05A 23-24	EMS3C/HK-06A 10-14	EMS3C/HK-07A 24-25	EMS3C/HK-08A 12-13
CQI & IRCA Certified ISO 14001:2015 EMS Lead Auditor ISO 14001:2015 环境管理体系 - 主任审核员证书培训课程 (CQI & IRCA 认可)	5	HKD 9,800/ HKD 9,300*			EMS/IRCA/07 22-26	
ISO 14001:2015 EMS Lead Auditor ISO 14001:2015 环境管理体系 - 主任审核员证书培训课程	5	HKD 5,800/ HKD 5,300*		EMS/LA/06 17-21		EMS/LA/08 19-23
ISO 14001:2015 EMS Leader Auditor Transition Course (IRCA Approved) ISO 14001:2015 环境管理体系 - 主任审核员转版课程	2	HKD 4,800/ HKD 4,300*			EMS/TC/07 22-23	
ISO 14001:2015 EMS - Implementation and Documentation ISO 14001:2015 环境管理体系 - 实施及文件指引	1	HKD 1,680/ HKD 1,580*	EMS8C/HK-05A 29			
ISO 14064-1:2018 Greenhouse Gases - Understanding & Application ISO 14064 温室气体排放查核 - 应用与理解	1	HKD 1,730/ HKD 1,630*		EM22C/HK-06A 17		EM22C/HK-08A Aug
ISO 14064-1:2018 Greenhouse Gases - Lead Verifier Training ISO 14064 温室气体排放查核 - 温室气体主任查验员课程	2	HKD 3,400/ HKD 3,300*		EM23C/HK-06A 20-21		EM23C/HK-08A 22-23
ISO 50001:2018 Energy Management Systems - Understanding & Application ISO 50001:2018 能源管理体系 - 理解与应用	1	HKD 1,200/ HKD 1,080*	EM07C/HK-05A 28		EM07C/HK-07A 24	
ISO 50001:2018 Energy Management Systems - Internal Auditor Training ISO 50001:2018 能源管理体系 - 内部审核员培训	2	HKD 3,500/ HKD 3,300*	EM08C/HK-05A 28-29		EM08C/HK-07A 24-25	
CQI & IRCA Certified ISO 50001:2018 Energy Management Systems Lead Auditor ISO 50001:2018 能源管理体系 - 主任审核员证书培训课程 (CQI & IRCA 认可)	5	HKD 9,800/ HKD 9,300*		ENMS/IRCA/06 17-21		
ISO 50001:2018 Energy Management Systems Lead Auditor ISO 50001:2018 能源管理体系 - 主任审核员证书培训课程	5	HKD 5,800/ HKD 5,300*		ENMS/LA/06 10-14		
ISO 50001:2018 Energy Management Systems Leader Auditor Transition Course (IRCA Approved) ISO 50001:2018 能源管理体系 - 主任审核员转版课程	1	HKD 1,200			ENMS/TC/07 22-23	
Eco Label Foundation Training 生态环保标志基础课程	1	HKD 1,500/ HKD 1,200*		EM24C/HK-06A 24		EM24C/HK-08A 22
Water Footprint Foundation Training 水足迹查核基础课程	1	HKD 1,500/ HKD 1,200*		EM25C/HK-06A 25		EM25C/HK-08A 23
How to Prepare Corporate Sustainability Report? 如何撰写企业可持续发展报告	1	HKD 1,600				SR01C/HK-08A 15
HKQAA Sustainable Building Index (HKQAA SBI) - Understanding & Verification 楼宇可持续发展指数 - 理解与验证	1	HKD 1,550	SBI1C/HK-05A 30			
<b>Occupational Health and Safety Management 职业健康和安</b>						
ISO 45001:2018 OHSMS - Understanding & Application ISO 45001:2018 职业健康安全管理体系 - 理解与应用	1	HKD 1,730/ HKD 1,630*	OH19C/HK-05A 14		OH19C/HK-07A 18	
ISO 45001:2018 OHSMS - Internal Auditor Training ISO 45001:2018 职业健康安全管理体系 - 内部审核员培训	2	HKD 3,400/ HKD 3,300*		OH20C/HK-06A 24-25		
CQI & IRCA Certified ISO 45001:2018 OHSMS Lead Auditor ISO 45001:2018 职业健康安全管理体系 - 主任审核员证书培训课程 (CQI & IRCA 认可)	5	HKD 9,800/ HKD 9,300*		QMS/IRCA/06 17-21		
ISO 45001:2018 OHSMS Lead Auditor ISO 45001:2018 职业健康安全管理体系 - 主任审核员	5	HKD 5,800/ HKD 5,300*		OHMS/LA/06 10-14		
Preparatory Course for ISO 45001 OHSMS 预备课程 - ISO 45001:2018 职业健康安全管理体系	1	HKD 1,680/ HKD 1,580*			OH18C/HK-07A 19	
<b>Green Finance and FinTech 绿色金融及金融科技</b>						
Green Finance Certification Foundation Workshop 2019 绿色金融认证基础工作坊 2019	half day	HKD 500	FP01C/HK-05A 07			FP01C/HK-08A 09
FinTech Enhancement Workshop Series Section 1: FinTech Governance Risk & Compliance Management	1	HKD 1,480/ HKD 1,280*		FP02C/HK-06A 13		
FinTech Enhancement Workshop Series: Section 2: Cybersecurity Leaders & Managers in FinTech	1	HKD 1,480/ HKD 1,280*		FP03C/HK-06A 20		
FinTech Enhancement Workshop Series: Section 3: Managing Successful FinTech Projects	1	HKD 1,480/ HKD 1,280*		FP04C/HK-06A 27		
FinTech Enhancement Workshop Series: Section 4: FinTech Startups & Sustainable Development	1	HKD 1,480/ HKD 1,280*			FP05C/HK-07A 04	
<b>Law and Legislation ( Hong Kong, Macau &amp; China) 法律与法规 (香港、澳门及中国)</b>						
Fundamental Contract Law for Managers and Professionals 管理者必须认识的合同法	1	HKD 1,500			M906C/HK-07A 10	
Legal Fundamentals of Tendering 招标法律基础	1	HKD 1,500	M909C/HK-05A 07			M909C/HK-08A 22
Negotiation and Mediation Skills for Managers and Professionals 管理者的谈判及调解技巧	1	HKD 1,500		M911C/HK-06A 24		
Legal Aspects of Patents and Copyrights - Uses and Protection 专利及版权法律精要 - 使用与保护	1	HKD 1,500	M921C/HK-05A 17			
Legal Aspects for Financial Technology 金融科技的法律需知	1	HKD 1,500			M933C/HK-03A 25	
Essentials of Employment Contracts & Related HR Law 雇佣合约及人力资源相关法律之精要	1	HKD 1,500		M928C/HK-06A 26		
Legal Impacts and Recent Development of European Union GDPR and Hong Kong PDPO 欧盟《通用数据保障条例》与香港《个人资料(私隐)条例》的法律影响及近期发展	1	HKD 1,600			M102C/HK-07A 10	
Safety and Environmental Offences in Construction Projects 「知法守法」课程系列 - 解构违反安全及环保法例事故	1	HKD 1,500			M908C/HK-07A 25	
Updates on Insurance Law and Practice in Hong Kong 香港保险法与实务最新修订	1	HKD 1,500		M932C/HK-06A 24		



Hong Kong 香港

May - Aug 2019 2019年5月至8月

Course Title 课程名称	Duration (Day) 课程长度(天)	Fee (per head) HKD 收费(每人)港币	Course Code & Date 课程编号及日期			
			May 五月	Jun 六月	Jul 七月	Aug 八月
<b>F&amp;B - Hygiene, Food Safety &amp; Wine Storage 卫生、食品安全及酒贮存</b>						
Hygiene Control System - Understanding & Implementation 卫生监控系统 - 理解与实施	1	HKD 1,600			GP02C/HK-07A 04	
ISO 22000:2018 FSMS - Understanding and Application ISO 22000:2018 食品安全管理体系 - 理解与应用	1	HKD 1,600/ HKD 1,500*	HA5C/HK-05A 10			HA7C/HK-08A 19
ISO 22000:2018 FSMS - Internal Auditor Training ISO 22000:2018 食品安全管理体系 - 内部审核员培训	2	HKD 3,500/ HKD 3,300*			HA7C/HK-07A 22-23	HA7C/HK-08A 19-20
CQI & IRCA Certified ISO 22000:2018 FSMS Lead Auditor Training ISO 22000:2018 食品安全管理体系 - 主任审核员证书 (CQI & IRCA 认可)	5	HKD 9,800/ HKD 9,300*				FSML/IRCA/08 05-09
ISO 22000:2018 Food Safety Management Systems - FSMS Lead Auditor Training ISO 22000:2018 食品安全管理体系 - 主任审核员证书	5	HKD 5,800/ HKD 5,300*				FSML/LA08 12-16
ISO 22000:2018 FSMS Leader Auditor Transition Course (IRCA Approved) ISO 22000:2018 食品安全管理体系 - 主任审核员转版课程	1	HKD 1,600/ HKD 1,500*				HA14C/HK-08A 07
ISO 22000:2018 FSMS Implementation Course ISO 22000:2018 实施食品安全管理体系课程	2	HKD 3,700/ HKD 3,500*			HA9C/HK-07A 22-23	
Implementing HACCP for Food Businesses Programme 实践食物安全重点控制 (HACCP) 课程	2	HKD 3,500/ HKD 3,200*				HA10C/HK-08A 22-23
食品卫生经理证书课程	3	HKD 1,500	M091C/HK-05A 08-10	M091C/HK-06A 24-26		
餐饮业食品安全评估员	3	HKD 3,500		M092C/HK-06A 12-14		M092C/HK-08A 14-16
食品安全专业导师证书课程	4	HKD 6,300	M935/HK-04A 27 Apr, 4, 11 May		M935/HK-07A 20, 27 Jul, 03, 10 Aug	
食物内除害剂残渍及虫害控制课程	2	HKD 1,800	M088C/HK-05A 08-09		M088C/HK-07A 24-25	
Foundation of HKQAA Wine Storage Management Systems Specifications 建立优良存酒设备 - 基础课程	1	HKD 1,500				QM04C/HK-08A 28
<b>Technology, Telecommunications, Information Security and Management 科技、电讯、资讯保安及管理</b>						
ISO/IEC 20000:2011 ITSMS - Understanding & Application ISO/IEC 20000:2011 资讯技术服务管理系统 - 应用与理解	1	HKD 1,600/ HKD 1,500*			IS10C/HK-07A 24-25	
ISO/IEC 20000 IT Service Management Internal Auditor Course ISO/IEC 20000:2011 资讯技术服务管理系统 - 内部审核员培训	2	HKD 6,200/ HKD 5,800*		IS09C/HK-06A 24-25		
ISO/IEC 27001:2013 ISMS - Understanding & Application ISO/IEC 27001:2013 资讯安全管理系统 - 应用与理解	1	HKD 1,600/ HKD 1,500*	ISE3C/HK-05A 23			
ISO/IEC 27001:2013 ISMS - Internal Auditor Training ISO/IEC 27001:2013 资讯安全管理系统 - 内部审核员培训	2	HKD 3,500/ HKD 3,200*			ISE4C/HK-07A 22-23	
CQI & IRCA Certified ISO/IEC 27001:2013 ISMS Lead Auditor Training ISO/IEC 27001:2013 资讯安全管理系统 - 主任审核员 (CQI & IRCA 认可)	5	HKD 9,800/ HKD 9,300*			ISMS/IRCA/07 22-26	
ISO/IEC 27001:2013 ISMS Lead Auditor Training ISO/IEC 27001:2013 资讯安全管理系统 - 主任审核员	5	HKD 5,800/ HKD 5,300*		ISMS/LA/06 17-21		ISMS/LA/08 19-23
CQI & IRCA Certified ISO/IEC 27001:2013 ISMS Lead Auditor Transition Course ISO/IEC 27001:2013 资讯安全管理系统 - 主任审核员转版课程	2	HKD 3,200/ HKD 3,000*			IS08C/HK 18-19	
Implementation of ISO/IEC 27001:2013 ISMS ISO/IEC 27001:2013 实践信息安全管理	2	HKD 3,500/ HKD 3,300*				ISE5C/HK-08A 05-06
TL 9000 R6.0/R5.5 QMS Auditing (QuEST Forum Sanctioned Training) TL 9000 R6.0/R5.5 质量管理体系审核课程 (QuEST Forum 认可课程)	3	HKD 10,500/ HKD 10,200**		ISE6C/HK-06A 17-19		
"砌App达人" 课程 (基础班)	1	HKD 1,800				M116C/HK-08A 14
<b>Customer Service: From Good To Great 顾客服务：迈向优越</b>						
ISO 10002:2018 Customer Satisfaction - Guidelines for Complaints Handling - Understanding & Application ISO 10002:2018 客户满意度 - 投诉处理指引 - 理解与应用	1	HKD 1,280		MT14C/HK-06A 17		
ISO 10002:2018 Customer Satisfaction - Guidelines for Complaints Handling - Understanding & Application - Internal Auditor Training ISO 10002:2018 客户满意度 - 投诉处理指引 - 内部审核员培训	2	HKD 3,200/ HKD 3,000*				MT56C/HK-08A 21-22
ISO 10002:2018 Customer Satisfaction - Guidelines for Complaints Handling - Transition Training 客户满意度 - 投诉处理指引 - 转版课程	1	HKD 1,280			MT73C/HK-07A 10	
Effective Complaint Handling & Risk Management in the Customer Service Centre 高效投诉管理技巧及服务中心风险管理	1	HKD 1,200		EW53C/HK-06A 17		
Target Management & Coaching Skills - "19 Questions" 目标管理的教练技巧 "19问"	1	HKD 1,200/ HKD 900*			M533C/HK-07A 04	
前线人员如何处理暴力顾客?	1	HKD 1,500				RM17C/HK-08A 21
QUA-MUNICATION 优质服务课程系列	2	HKD 3,800			M534C/HK-07A 24-25	
零售营业策略规划及目标管理	1	HKD 1,200		M096C/HK-06A 26		
<b>Soft Skills Training Program 软技巧训练课程</b>						
Introductory to Coaching Skills - To Unleash your Staff Potential 教练学入门篇 - 释放员工潜能	1	HKD 1,500/ HKD 1,200*			M534C/HK-07A 23	
Maximize your Communication Flexibility by "Meta-Program" 从"处事模式"增强沟通的弹性	1	HKD 1,200/ HKD 900*				M535C/HK-08A 06
Skills Set to Integrate with New-Gen 与职场新生代共融技巧	1	HKD 1,200/ HKD 900*		M536C/HK-06A 26		
Tips for Being a "New-Gen" Supervisor 新世代主管秘笈	1	HKD 1,200/ HKD 900*			M537C/HK-07A 10	
速效建立亲和的人际关系工作坊	2:00pm-5:00pm half day	HKD 780/ HKD 580*	M526C/HK-05A 29			M526C/HK-08A 14
服务应对技巧 - 「语言的层次」	2:00pm-5:00pm half day	HKD 780/ HKD 580*		M527C/HK-06A 18		
Find your "Time Stone" back - Skills Set for Time Management 找回你的"时间石" - 高效时间管理技巧	2:00pm-5:00pm half day	HKD 780/ HKD 580*			M528C/HK-07A 10	
Breakthrough in Mind and Self Awareness - Level 1 - The Law of Change 自我突破及察觉课程: 改变的法则	2	HKD 2,180			M506C/HK-06A 22-23	
Introduction to Design Thinking 设计思维入门	1	HKD 1,800/ HKD 1,500*	M084C/HK-05A 28			M084C/HK-08A 06
大笑瑜伽领袖认证课程	2	HKD 2,700/ HKD 2,400*			M082C/HK-07A 11-12	
The 7 Habits of Highly Effective People Signature Program	2	HKD 10,000/ HKD 9,500*	PC01C/HK-05A 23-24	PC01E/HK-06A 17-18	PC01C/HK-07A 11-12	PC01C/HK-09A 05-06
<b>Entrepreneur Technical Tools 企业家技术工具</b>						
ISO 37001 Anti-Bribery Management Systems - Introduction ISO 37001 防贪管理体系入门	9:00am-12:00pm half day	HKD 980		A001C/HK-06A 21		
ISO 41001:2018 Facility Management System - Understanding & Application ISO 41001:2018 设施管理体系 - 应用与理解	1	HKD 1,600/ HKD 1,500*			FMS01C/HK-07A 10	
ISO 55001:2014 Asset Management System - Understanding & Application ISO 55001:2014 资产管理体系 - 应用与理解	1	HKD 1,600/ HKD 1,500*			SM04C/HK-07A 25	
Implementation of HKQAA 5S in the Workplace Operation 实施 HKQAA 5S 在工作间的营运	1	HKD 1,600/ HKD 1,500*			GP03C/HK-07A 31	

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Hong Kong 香港

May - Aug 2019 2019年5月至8月

Course Title 课程名称	Duration (Day) 课程长度(天)	Fee (per head) HKD 收费(每人)港币	Course Code & Date 课程编号及日期			
			May 五月	Jun 六月	Jul 七月	Aug 八月
<b>Business Continuity Management, Risk and Crises Management 营运持续管理、风险管理</b>						
<b>NEW</b> Business Continuity Planning and Management 营运持续管理体系	3	HKD 6,000/ HKD 5,800*			RM03C/HK-07A 23-25	
<b>NEW</b> Resolve Crisis Emotional Distress: Evaluation & Methods 解开灾难对情绪困扰: 评估与方法	1	HKD 2,100/ HKD 1,900*		RM09C/HK-06A 24		
ISO 22301 Business Continuity Management Systems - Understanding & Application ISO 22301 营运持续管理体系 - 理解与应用	1	HKD 1,600			RM01C/HK-07A 23	
<b>NEW</b> ISO 22301 Business Continuity Management Systems - Internal Auditor Training ISO 22301 营运持续管理体系 - 内部审核员培训	2	HKD 3,700/ HKD 3,500*				RM02C/HK-08A 21-22
<b>NEW</b> Business Continuity Management System (BCMS) Auditor/Lead Auditor Conversion Training Course 营运持续管理体系 - 主任审核员转版课程	3	HKD 9,500/ HKD 9,000*				MT57C/HK-08A 14-16
ISO 31000:2009 Principles and Guidelines for Risk Management - Understanding & Application ISO 31000:2009 风险管理的原因及指引 - 理解与应用	1	HKD 1,600			RM04C/HK-01A 23	
<b>Entrepreneur Management Tools 企业家管理工具</b>						
Workshop on Performance Management through KPI Setting 企业及部门绩效管理培训工作坊	1	HKD 1,080/ HKD 980*	M021C/HK-05A 06			M021C/HK-08A 06
Workshop on Developing Supervisory Skills & Leadership Charisma 强势督导管理培训工作坊	1	HKD 1,080/ HKD 980*		M022C/HK-06A 03		
Workshop on Strategic Compensation System Design 策略性薪酬设计培训工作坊	1	HKD 1,080/ HKD 980*		M023C/HK-06A 18		
Workshop on Business Process Improvement 业务流程改善培训工作坊	1	HKD 1,080/ HKD 980*			M024C/HK-07A 23	
Workshop on Effective Project Management 有效项目管理培训工作坊	1	HKD 1,080/ HKD 980*				M025C/HK-08A 14
Workshop on Effective Performance Appraisal 个人绩效管理 工作坊	1	HKD 1,080/ HKD 980*				M026C/HK-08A 06
Workshop on Effective Communication & Influencing Skills 有效沟通及影响技巧培训工作坊	1	HKD 1,080/ HKD 980*			M028C/HK-07A 12	
Workshop on Transforming HR Role as Strategic Partners 提升 HR 策略性伙伴地位培训工作坊	1	HKD 1,080/ HKD 980*		M063C/HK-06A 18		
Workshop on Competency-based Interviewing Skills 以职能为主之招聘面谈技巧培训工作坊	1	HKD 1,080/ HKD 980*				M081C/HK-08A 19
<b>NEW</b> 国内营销学 - 微营销攻略 (进阶)	half day	HKD 980	M100C/HK-05A 27	M100C/HK-06A 24		
<b>NEW</b> 国内营销学 - 全方位新营销攻略 (深进)	1	HKD 1,800			M101C/HK-07A 25	
<b>NEW</b> 高效建设及管理销售团队	1	HKD 1,200	M119C/HK-05A 09			
<b>Team Building 团队建设</b>						
<b>NEW</b> Zodiac: The Game of Business Finance and Strategy	1 to 2					
<b>NEW</b> Team Collaboration in LEGO® SERIOUS PLAY®	1 to 2					
<b>NEW</b> Team Collaboration in Meaningful Micro-Film Production 微电影制作团队建立	1 to 2					

我们专为企业提供度身定造的培训，详情可与本局课程经理洽谈。  
Mr. Kerwin Ho (2202 9367 / 6050 6127) / kerwin.ho@hkqaa.org  
Mr. Andy Fung (2202 9395 / 6111 3855) / andy.fung@hkqaa.org

Macau 澳门

May - Aug 2019 2019年5月至8月

Course Title 课程名称	Duration (Day) 课程长度(天)	Fee (per head) HKD 收费(每人)港币	Course Code & Date 课程编号及日期			
			May 五月	Jun 六月	Jul 七月	Aug 八月
<b>Retail, Marketing and Sales 零售、市场及销售</b>						
Marketing for Service Industry 服务业市场攻略	2	HKD 1,030	02 - 03			
Excellence in B2B Presentation 高效B2B演示	1.5	HKD 770		25 - 27		27 - 29
High Impact Presentation 高效演练	1.5	HKD 770	21 - 24			
Marketing for Retail Industry 零售业市场攻略	1.5	HKD 770	28 - 30			
Brand Marketing 品牌推广及管理	1.5	HKD 770			02 - 04	
<b>Management, Public Administration, Organisational Management, Human Resources and Public Relations 管理、公共管理、机构管理、人事管理及公共关系</b>						
Outsourcing Management 外判管理	2	HKD 1,030			09 - 11	
Risk Management 危机管理	2	HKD 1,030				06 - 08
Appreciation for Project Management 项目管理基础	1.5	HKD 770		11 - 13		20 - 22
Professional Project Management for IT Project IT项目管理	1.5	HKD 770	07 - 09			
Professional Project Management for New Service Launch 新服务推出的项目管理	1.5	HKD 770		18 - 20		
Contract Management 合约管理	2	HKD 1,030	14 - 16		23 - 25	

**Remarks 备注** \* Please refer the early bird payment deadline to our website 请于本局网页参看优先报名之付款详情 \*\* QuEST Forum member  
The course schedule is subject to change. Please refer to the most updated schedule in our web-site 课程内容或会略为改动，最新详情请参看本局网页  
Organisations contracted HKQAA as their management system certification service providers have no obligation to enroll in any HKQAA training services  
聘用本局管理体系认证服务的机构并无义务参加本局所举办的培训课程

**C** Conducted in Cantonese 以广东话授课 **E** Conducted in English 以英语授课 **P** Conducted in Putonghua 以普通话授课

For enquires, please contact our Training Service Unit at Tel : 2202 9111 Our web-site : http://www.hkqaa.org/training/ Email : training@hkqaa.org



Mainland China 中国内地

May - Aug 2019 2019年5月至8月

Course Title 课程名称	Duration (Day) 课程长度(天)	Fee (per head) RMB 收费(每人)人民币	Course Code & Date 课程编号及日期			
			May 五月	Jun 六月	Jul 七月	Aug 八月
<b>Standard &amp; Systems Training 标准体系培训</b>						
ISO 9001:2015 Quality Management System - Internal Auditor Training ISO 9001:2015 质量管理体系内部审核员培训	P 3	RMB 2,120	VM3P/GZ05A GZ 27-29			VM3P/GZ08A GZ 19-21
ISO 9001:2015 Documented Information - Document Structures and Document System Establishing Training ISO 9001:2015 质量管理体系文件化信息之文件结构与编制培训	P 1	RMB 1,590		QMS4P/GZ06A GZ 04		
ISO 9001:2015 Quality Risk Management Implementing ISO 9001:2015 质量风险管理实务	P 1	RMB 1,590			QM07P/SH07A SH 15	
IECQ HSPM QC080000 Hazardous Substance Management System - Internal Auditor Training IECQ HSPM QC080000 有害物质管理体系内部审核员培训	P 2	RMB 2,650			IE01P/GZ07A GZ 11-12	
TL 9000 R6.0/R5.5 Telecommunication Quality Management System - Internal Auditor Training TL 9000 R6.0/R5.5 电信业质量管理内审员培训	P 3	RMB 3,710	TL04P/SH05A SH 24-26			
TL 9000 R6.0/R5.5 Quality Management Systems - Auditing TL 9000 R6.0/R5.5 电信业质量管理体系审核员 (QuEST Forum 授权课程)	P 5	RMB 16,960				TL02P/GZ08A GZ 12-16
IATF 16949:2016 Automobile Industry Quality Management System - Internal Auditor Training IATF 16949:2016 汽车行业质量管理体系内审员培训	P 3	RMB 2,650	MT68P/GZ05A GZ 20-22			
VDA 6.3 Process Audit&VDA6.5 Product Audit VDA 6.3 过程审核及VDA6.5产品审核	P 3	RMB 3,180	EO06P/GZ05A GZ 13-15			EO06P/SH08A SH 07-09
ISO/IEC 27001:2013 Information Security Management Systems Internal Auditor Training ISO / IEC 27001:2013 信息安全管理体系内审员培训	P 3	RMB 3,710		ISE7P/SH06A SH 10-12		
ISO 13485:2016 Medical Device Industry Quality Management System - Internal Auditor Training ISO 13485:2016 医疗器械行业质量管理体系内部审核员培训	P 3	RMB 2,650			GM20P/GZ07A GZ 29-31	
ISO/IEC 20000:2011 Information Technology Service Management System - Internal Auditor Training ISO/IEC 20000:2011 IT 信息技术服务体系内部审核员培训	P 3	RMB 3,710		ISE9P/GZ06A GZ 17-19		
SA 8000:2014 Social Accountability Management Systems - Internal Auditor Training SA 8000:2014 社会责任管理体系内部审核员培训	P 2	RMB 1,696			SA01P/GZ07A GZ 08-09	
ISO 45001 Occupational Health and Safety Management Systems - Internal Auditor Training ISO 45001 职业健康安全管理体系内部审核员培训	P 2	RMB 1,590	OHS9P/GZ05A GZ 23-24			OHS9P/GZ08A GZ 26-27
ISO 14001:2015 Environmental Management Systems - Internal Auditor Training ISO 14001:2015 环境管理体系内部审核员培训	P 2	RMB 1,590			EMS3P/GZ07A GZ 18-19	
ISO 31000:2009 Risk Management System - Internal Auditor Training ISO 31000:2009 风险管理体系内部审核员培训	P 2	RMB 2,650		RM15P/GZ06A GZ 13-14		
ISO 22000:2005 Food Safety Management Systems -Internal FSMS Auditor Training ISO 22000:2005 食品安全管理体系内部审核员课程	P 3	RMB 3,180				HA7P/GZ08A GZ 05-07
Hygiene Control System - Understanding & Implementation 卫生监控系统-理解与实施	P 1	RMB 1,272	GP02P/GZ05A GZ 31			
<b>Production/Quality/Supply Chain/Customer Service Management 生产/质量/供应链/客服管理</b>						
5S 现场管理 5S Site Management	P 1	RMB 1,590	GP09P/GZ05A GZ 10			
JIT (Just In Time) of Lean Production 精益生产之JIT(准时生产)	P 2	RMB 3,180		GM21P/GZ06A GZ 20-21		
GD&T Gage Design and Detection in Practice GD&T 检具设计及检测	P 2	RMB 3,180			GM14P/GZ07A GZ 22-23	
Measurement Management 计量管理与仪器效验管理实务培训	P 1	RMB 1,590	MS10P/SH05A SH 09			
Flexible Production Planning Management 柔性生产计划与排程管理	P 2	RMB 3,180		EC08P/GZ06A GZ 24-25		
TPM - Total Productive Maintenance TPM - 全面生产管理实战	P 2	RMB 2,650			GM26P/SH07A SH 04-05	
Key to Strong Enterprise - Quality Circle Operation 强企之本一 品质圈QCC运作	P 2	RMB 1,908				ES28P/GZ08A GZ 15-16
Five Core Tools(APQP/FMEA/SPC/MSA/PPAP) 五大核心工具(APQP/FMEA/SPC/MSA/PPAP)	P 3	RMB 3,180	MS01P/GZ05A GZ 08-10			
8D - Quality Problem Analysis and Solving 8D - 质量问题分析	P 1	RMB 1,590				ES29P/GZ08A GZ 02
Total Quality Management TQM 全面质量管理	P 2	RMB 3,180		MS15P/GZ06A GZ 05-06		
Project Management 项目管理	P 2	RMB 3,180			MS17P/GZ07A GZ 09-10	
Statistical Process Control SPC统计过程控制	P 1	RMB 1,590				MS20P/SH08A SH 22-23
Failure Mode and Effects Analysis FMEA 潜在失效模式分析	P 1	RMB 1,590		MS04P/GZ06A GZ 03		
Seven QC Tools (Traditional & New) QC七大手法	P 2	RMB 2,650				GM12P/GZ08A GZ 20-21
Advanced Study for Supplier Quality Engineers 供应商质量工程师研修班	P 2	RMB 2,650	MS19P/GZ05A GZ 27-28			
<b>Management Development Training 管理发展培训</b>						
Communication Skills 沟通技巧	P 2	RMB 2,544		GM07P/GZ06A GZ 19-20		
TTT Training on Internal Lecturer - Professional Presentation Skill TTT 内部培训师培训之专业演示技巧	P 2	RMB 3,710			GM06P/GZ07A GZ 24-25	
Manufacturing Workshop Management Practices - Group Leader Management 制造车间管理实战 一班组长工作篇	P 2	RMB 2,650	MT33P/GZ05A GZ 06-07			
Management Skills for Middle Management 中层管理人员管理技能培训	P 2	RMB 2,650				MS14P/GZ08A GZ 28-29
Meeting Management with High Efficiency 高效会议管理	P 1	RMB 1,590	GM08P/GZ05A GZ 17			
Employee Motivation 员工动力驱动器 员工激励	P 2	RMB 3,180		GM23P/SH06A SH 11-12		
Mind Map@ : 思维导图轻松提升工作效率	P 1	RMB 2,120				M504P/SH08A SH 16
Zodiak@ : 商业策略、决策及财务游戏工作坊	P 1	RMB 1,590			MS19P/GZ07A GZ 04	
Human Resource Management for Non-Human Resource Manager 非人力资源经理的人力资源管理	P 2	RMB 2,650		GM25P/GZ06A GZ 14-15		

For registration and enquiry  
报名及查询

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Last Updated Date : 12 April 2019

For training course details and online registration, please visit HKQAA website 详细课程资料及网上报名, 请浏览香港品质保证局网页 <http://www.hkqaa.org>



# Green Finance Certification Foundation Workshop 2019

## 绿色金融认证基础工作坊 2019

本课程旨在促进参加者对绿色金融认证的认识，贴近国际和国内市场的最新动向，透过课堂和互动式的案例分析工作坊，解读绿色金融认证最新相关政策所带来的影响和绿色金融认证在国内外市场的融合，探讨在内地及香港绿色金融认证市场的机遇。

This course is designed to promote participants' understanding of green finance certification, the latest trends in international and domestic markets, and the impact of the latest policies on green financial certification in HK and China.

- 介绍香港绿色金融认证基本原则和实践  
Introduction of Green Finance Certification Foundation Scope & Developments
- 绿色金融认证基础范围和发展  
Foundation Overview and Practice of Green Finance Certification in China
- 香港绿色金融认证基础履行  
Foundation Implementation of the Hong Kong Green Finance Certification Scheme
- 「绿色标签」所带来的商业机遇和市场上的挑战  
Business Opportunities of the "Green Label" & Challenges in the Market

<b>Date</b> 日期	9 August 2019   2019年8月9日
<b>Time</b> 时间	2:30pm - 5:30pm   下午2时30分至下午5时30分
<b>Venue</b> 地点	19/F., K. Wah Centre, 191 Java Road, North Point, Hong Kong 香港北角渣华道191号嘉华国际中心19楼
<b>Language</b> 语言	Cantonese   广东话

**Enquiry 查询**  
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# Target Management & Coaching Skills – “19 Questions”

## 目标管理的教练技巧「19问」

公司能否持续达成指标，直接影响全公司的收入、甚至是企业未来的前景，作为部门主管或销售团队，除了推动团队目标或销售业绩外，当你了解到指标对员工背后的某些「动力」后加以跟工作联系，推动团队达标其实可以是容易事。本课程是为管理及推动策略团队的人士（部门主管、销售主管及带领团队达成 KPI 等）而设，让学员透过订立目标规划，带动高效团队达成指标。

透过教练技巧 (Coaching Skills) 及目标管理 (Target Management)，让参加者能有效掌握：

- 寻找员工对指标背后的「动力」 Searching for the "motivations" of employees behind the targets
- 具体规划目标策略 Planning specific target strategies
- 冲破员工 / 团队于目标上的「限制想法」 Overcome "limited thoughts" of employees/team in regard to the targets
- 巩固员工达标及业绩长远的达成 Help employees to reach the targets and boost the sales growth in the long term
- 透过回馈的「技巧」，让员工持续自我改善 Using the "technique" of feedback to improve employees' performance continually
- 利用提问的力量激发员工 / 自我达成目标 Utilising the power of questioning to motivate employees/self to achieve the targets

The company's target management directly affects the revenue and prospect of the company. As a department head or sales team, it is important to understand what those "targets" means to employees and become motivation as a result. This course is designed for management professionals and those who lead the strategy team (such as department head, sales head and those who leads the team to achieve KPI), allowing participants to set up target plans, and drive a efficient team to reach their targets.

Through Coaching Skills and Target Management, the participants can easily learn the following :

<b>Date</b> 日期	4 July 2019   2019年7月4日
<b>Time</b> 时间	9:30am - 5:00pm   早上9时30分至下午5时
<b>Venue</b> 地点	19/F., K. Wah Centre, 191 Java Road, North Point, Hong Kong 香港北角渣华道191号嘉华国际中心19楼
<b>Language</b> 语言	Cantonese   广东话