

# Annex: New themes template

## Description of the theme or initiative

Explanation of the need or opportunity identified in the financial sector in the area of sustainable finance.

## Strategic match

The checklist is used to determine whether the initiative fits the strategy, expertise and composition of the Platform. It assesses the following:

- Does a theme potentially have a **material impact** on the **financial sector**, and vice versa?
- Does addressing the theme **collectively** and **cross-sectorally**<sup>1</sup> provide added value?
- Does the initiative focus on **exploring** or **(further) developing** a theme?
- Is there **any overlap** with existing initiatives?

## Approach

If the initiative fits within the Platform strategy, the promoters develop a proposal, which includes the following components:

- **Impact:** What impact and added value does the initiative deliver? For which target group or groups?
- **Roadmap:** Which roadmap will be followed? What specific deliverables are planned? What does the end result/target state look like, including any future embedding. What timeframe is involved?
- **Methods:** What form and method will be used (working group, expert group or another form)?
- **Resources:** What resources are needed to realise deliverables and impact (staffing and brainpower, financial support, etc.)? What resources are available or have been committed? How will the remaining resources be obtained? Which organisations are sponsoring the initiative?

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<sup>1</sup> Across financial sectors (banks, insurers, pension funds, asset managers)