WP3 Participant Workbook: Team 1

Sustainable Investment & Risk

Participants: University of Twente (UT), Lucian Blaga University (LBUS), University of Siena (UNISI)

Date: August 1, 2026

Team 1 Overview

Role	Partner
Team Lead	UT
Module 1 Lead	UT
Module 2 Lead	LBUS
Module 3 Lead	UNISI

Focus Areas: - Green finance fundamentals - Sustainable investment strategies - ESG integration and risk management

Modules Assigned: 1, 2, 3 (2.6 ECTS total)

Pre-Work Checklist

Before the kick-off, please complete:

- [ ] Review WP2 curriculum design outputs
- [ ] Identify 2-3 case studies from your institution's experience
- [ ] List potential industry contacts for guest content
- [ ] Review green finance landscape in your region
- [ ] Prepare questions for kick-off discussion

Session Notes

Session 1: WP3 Overview

Key Points: - - -

Questions I Have: - -

My Takeaways: - -

Session 2: Team Structure

My Role Clarity (1-5): _

Module I'm Leading/Supporting:

Initial Concerns: - -

Session 3: Quality Assurance

Quality Standards I Need to Focus On: - -

Review Process Notes: - -

Session 4: T3.1 Planning

My Sprint 1 Commitments: - -

Key Dates for Me:

Date	Milestone

Session 5: Workshop

Discussion Outcomes: - - -

Action Items I Committed To:

Action	Due Date	Status

Module Planning Templates

Module 1: Green Finance Fundamentals (UT)

Learning Outcomes: 1. 2. 3.

Key Topics: - - -

Case Studies to Include: - -

Assessment Approach: -

Module 2: Sustainable Investment (LBUS)

Learning Outcomes: 1. 2. 3.

Key Topics: - - -

Case Studies to Include: - -

Assessment Approach: -

Module 3: Risk Management & ESG (UNISI)

Learning Outcomes: 1. 2. 3.

Key Topics: - - -

Case Studies to Include: - -

Assessment Approach: -

Team Communication Plan

Preferred Meeting Time:

Communication Channel: - Quick questions: - Document sharing: - Meetings:

Team Meeting Schedule:

Day	Time	Focus

Sprint 1 Personal Workplan

Week 1 (Aug 8-14): Create

Day	Task	Hours
Mon		
Tue		
Wed		
Thu		
Fri		

Week 2 (Aug 15-21): Review

Day	Task	Hours
Mon		
Tue		
Wed		
Thu		
Fri		

Week 3 (Aug 22-28): Revise

Day	Task	Hours
Mon		
Tue		
Wed		
Thu		
Fri		

Asian Partner Input Requests

From Asian Partners, I Need:

Topic	Specific Request	Partner to Ask
Local regulations		
Industry examples		
Cultural considerations		
Case study data		

Risk Log

Risk	Impact	Mitigation	Status

Glossary

Term	Definition
ESG	Environmental, Social, Governance
ECTS	European Credit Transfer System
SFDR	Sustainable Finance Disclosure Regulation

Contact Directory

Role	Name	Email	Phone
WP3 Lead			
Team 1 Lead			
Module 2 Lead			
Module 3 Lead			
Project Support			

Notes

Use this space for additional notes during sessions:

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The project site is https://digital-ai-finance.github.io/Green-Finance. A question about this file goes to joerg.osterrieder@utwente.nl.

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