# ENGAGE for ESG

## ENGAGE for ESG: a simple solution for ESG reporting

Thursday, 27 March 2025

# Today's Speakers

**Sergio Mayordomo**
Head of Financial Analysis Division
Banco de España

**Maitane Puente González**
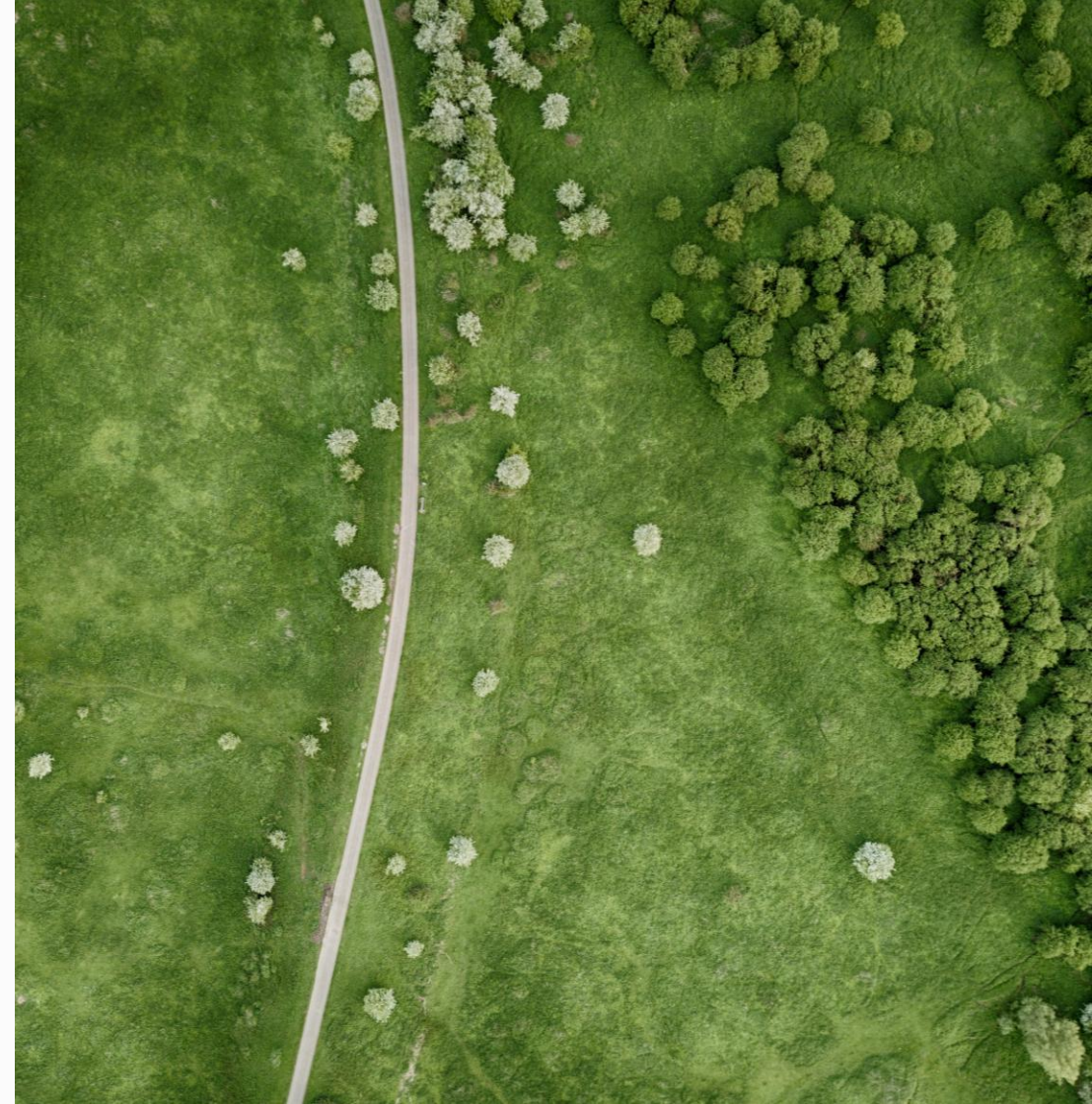Legal Advisor & Compliance Officer
European DataWarehouse

**Gijs Verschuur**
Business Analyst
Hypoport

# Agenda

I. Welcome and introduction

II. Research Paper: "Climate Risk, Soft Information and Credit Supply"

III. The ENGAGE Portal

IV. What's next with the ENGAGE for ESG initiative

# Welcome & Introduction

**Maitane Puente González**

**European DataWarehouse**

# ENGAGE for ESG initiative

- Co-funded by the European Union with a LIFE grant

- **Duration:** 1 November 2022 – 31 October 2025

- Six consortium partners from across Europe

- **Scope:** ENGAGE for ESG aims to provide:

  A. A **simple solution** for **ESG reporting**

  B. For **mortgages** and **home renovation loans** to check **alignment with:**

     1. the **EU Taxonomy Regulation;**

     2. in compliance with the **Energy Performance of Buildings Directive;** and

     3. the **General Data Protection Regulation.**
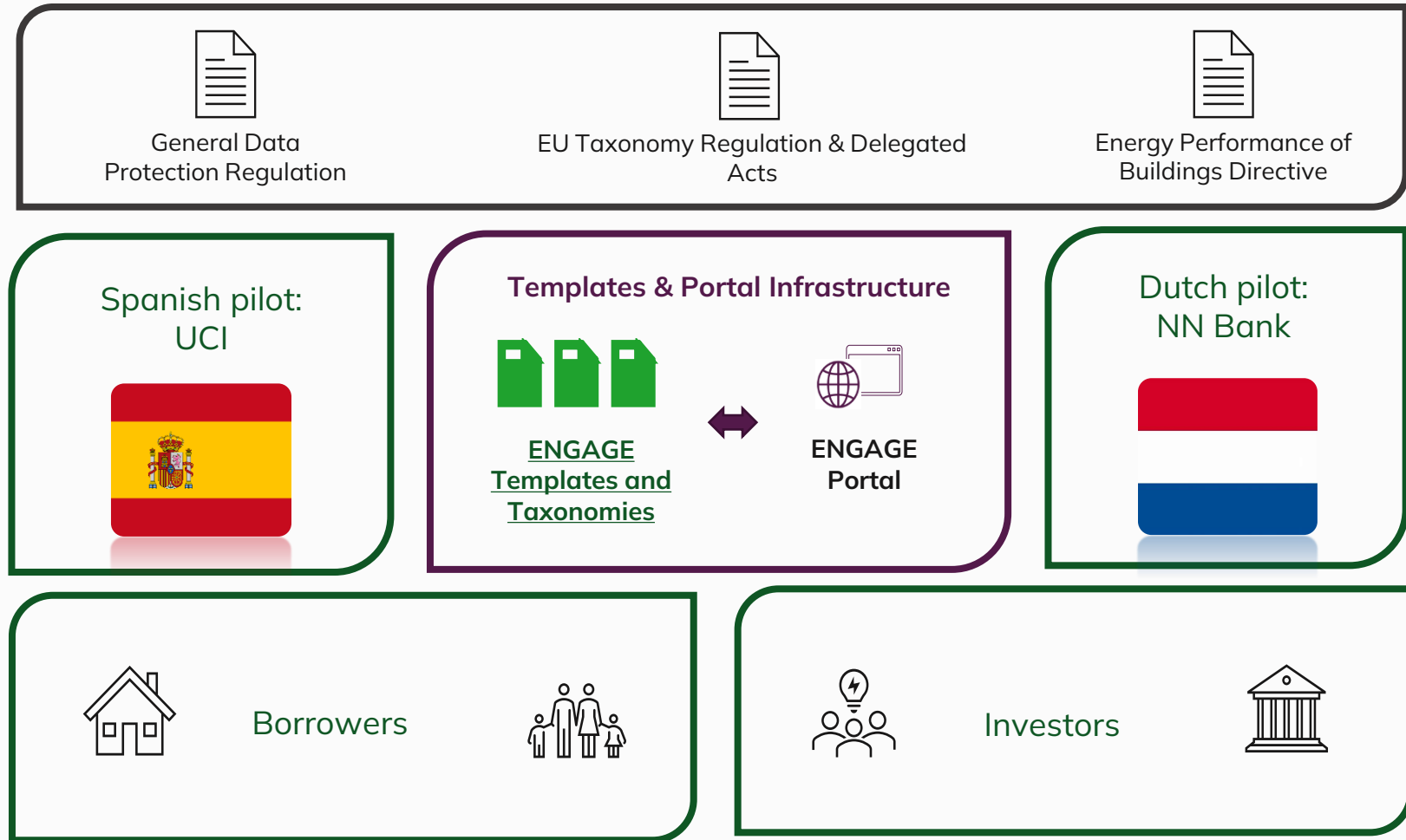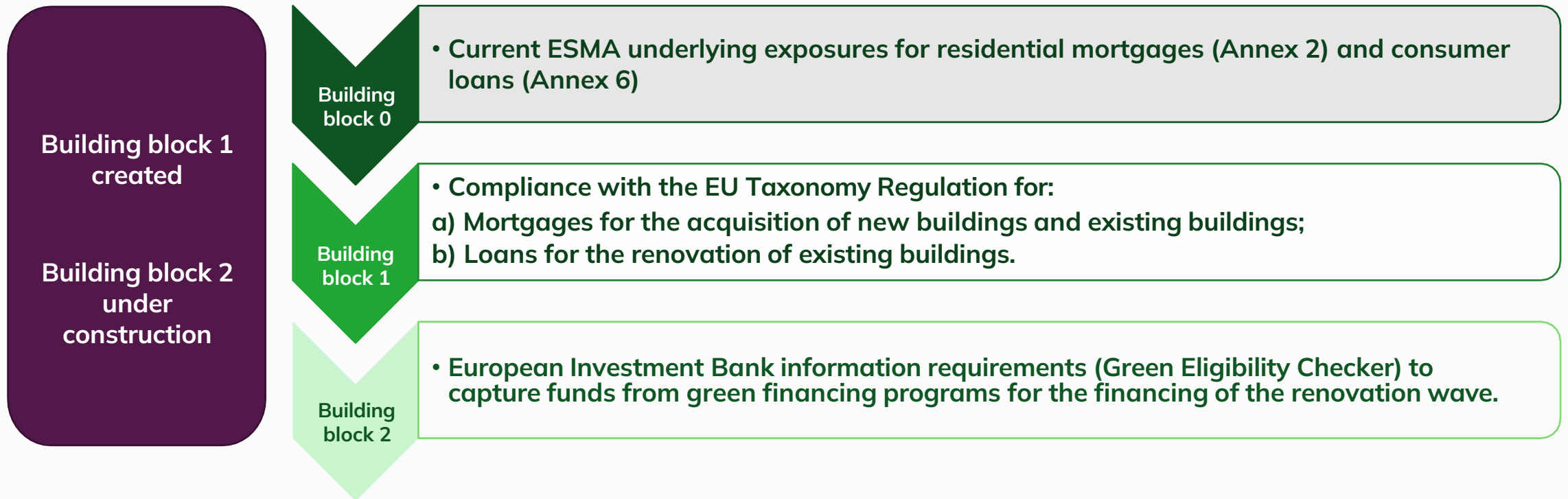
# ENGAGE for ESG initiative description

Two main pillars:

1. A **disclosure template** for residential real estate data;

2. A **portal** to assess EU Taxonomy alignment.

General Data Protection Regulation

EU Taxonomy Regulation & Delegated Acts

Energy Performance of Buildings Directive

Spanish pilot: UCI

**Templates & Portal Infrastructure**

**ENGAGE Templates and Taxonomies**

**ENGAGE Portal**

Dutch pilot: NN Bank

Borrowers

Investors

# The ENGAGE Templates: structure

**Building block 1 created**

**Building block 2 under construction**

**Building block 0**
- Current ESMA underlying exposures for residential mortgages (Annex 2) and consumer loans (Annex 6)

**Building block 1**
- Compliance with the EU Taxonomy Regulation for:
  a) Mortgages for the acquisition of new buildings and existing buildings;
  b) Loans for the renovation of existing buildings.

**Building block 2**
- European Investment Bank information requirements (Green Eligibility Checker) to capture funds from green financing programs for the financing of the renovation wave.

# Hellenic Financial Stability Fund Sustainability Report 2023

On 20 November 2024 the Hellenic Financial Stability Fund (HFSF) published its Sustainability Report for 2023.

The report covers the HFSF's ESG approach and its role in the banking sector of Greece, in particular, its role in strengthening the sustainable financing and climate transition of Greek banks.

In its report, the HFSF supports the ENGAGE for ESG initiative and urges Greek banks to join the initiative to support the increase of sustainable finance and promote better monitoring and measurement for banks' lending portfolios.



The full HFSF Sustainability Report 2023 is available at https://hfsf.gr/en/hfsfs-esg-sustainability-report/

# Research Paper: "Climate Risk, Soft Information and Credit Supply"

Sergio Mayordomo

Banco de España

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# Climate Risk, Soft Information, and Credit Supply

Laura Álvarez-Román (Banco de España)
Sergio Mayordomo (Banco de España)
Carles Vergara-Alert (IESE)
Xavier Vives (IESE)

2025 ENGAGE for ESG Webinar Series
27 March, 2025

## Surge of high-intensity wildfires and climate change

- **High-intensity wildfires** are increasing in frequency and severity fostered by **climate change**
  - The duration of the wildfire season increased by 27% globally between 1979 and 2019 (Jonas et al., 2022).

- **Spain** is one of the countries most affected by wildfires in Europe (Costa et al., 2020).
  - Spain accounted for 40% of the EU territory consumed by forest fires in 2022.

- Wildfires have adverse effects on the **business activity**.
  - Drop in sales over assets of firms in affected areas of 7 pp (as compared to similar unaffected firms).

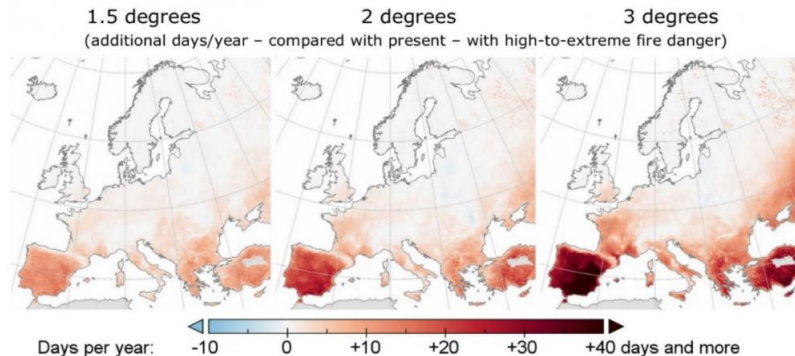# Wildfire risk is expected to increase significantly



Figure: Additional days per year with high-to extreme fire danger for different levels of global warming compared to 1981-2010 (Feyen, L., et al. (2020))

- The projected increase in fire danger is strongest in southern European countries, where fires are already frequent and intense.

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## Research questions

- Do wildfires affect **bank lending**?

- Do **local banks** reduce lending to firms affected by a fire more or less than **outsider banks**?

- And to affected firms **in cases where soft information plays a critical role in lending decisions**?

- If local banks supply more credit post-fire to affected firms, do these lending practices increase their **risk exposure**?

## Conceptual Framework

- **Portfolio allocation channel**.
  - Outsider banks can reallocate capital away from disaster stricken areas.

- **Credit supply determinants**.
  - Outsider banks are better equipped to absorb the financial shocks associated with climate disasters.

- **Soft information channel**.
  - Soft information enables effective monitoring after climate disasters.
  - Local banks can better monitor affected firms (lower physical distance).

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## Contribution to the literature

- We contribute to the literature that analyzes the role of **small or local banks** in maintaining the **supply of credit after natural disasters**.
  - See Chavaz (2016), Cortés y Strahan (2017), y Koetter, Noth, y Rehbein (2020).

- We find that the differential **use of soft information by local** and external banks significantly influences **credit allocation** after a climatic event.

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# Data

- **Firms' characteristics.** Banco de España's Central Balance Sheet Data Office (CBSDO) and SABI to obtain the geographical coordinates where each firm is located.

- **Corporate loan data.** Banco de España's Central Credit Register. Monthly data on all bank-firm relationships.

- **Wildfires.** CIVIO data on all fires in Spain with a burned area of at least 1 hectare from 2001 and 2017. We restrict the sample to those fires equal or larger than 500 hectares.

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# Our sample of wildfires
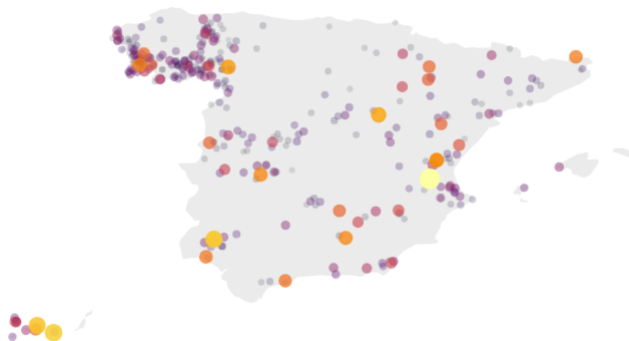


Figure: Map of Spain with the 337 wildfires larger or equal to 500 hectares during the period 2004-2017

# Affected firms
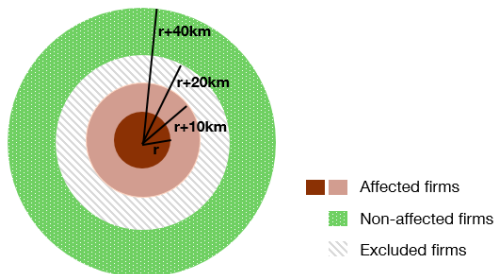
## Definition of affected and non-affected firms



- Affected firms
- Non-affected firms
- Excluded firms

Table: Stats of firms affected and non-affected by fires (2004-2017)

|  | Affected firms | | Non affected firms | |
|---|---|---|---|---|
|  | Obs. | Mean | Obs. | Mean |
| Log (total assets) | 54,317 | 5.8 | 423,342 | 5.9 |
| ROA | 54,317 | -1.4 | 423,342 | -1.5 |
| Capital over total assets | 54,317 | 14.7 | 423,342 | 14.4 |

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## Empirical strategy

- Econometric specification to disentangle credit supply provided by local banks to affected firms:

$$\Delta Credit_{f,b,t+1} = \beta PropCredit_{b,p,t-1} \times Fire_{f,t} + \gamma_{b,p,t} + \gamma_{f,t} + \epsilon_{f,b,t+1},$$

  - $\Delta Credit_{f,b,t+1}$: log change in the amount of firm $f$'s credit with bank $b$ between Dec of year $t-1$ and Dec of year $t+1$.
  - $PropCredit_{b,p,t}$ is the fraction of bank $b$'s credit balance in province $p$ where firm $f$ is located, as of December of $t-1$.
  - $Fire_{f,t}$ is a dummy=1, if the firm is in the affected area.

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## Outline

1. Credit supply by local banks after fire

2. Credit supply by local banks after fire and soft information

3. Loan performance and employment in affected areas

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1 Credit supply by local banks after fire

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## Credit growth after a fire

**Hypothesis 1:** *The amount of credit obtained by a given firm declines after a climate event.*

| Dep. Var.: | (1) $\Delta Credit_{f,b,t+1}$ | (2) $\Delta Credit_{f,b,t+1}$ | (3) $\Delta Credit_{f,b,t-1}$ | (4) Applications |
|---|---|---|---|---|
| Fire (10km) | -0.059* (0.032) | | -0.005 (0.035) | -0.007 (0.008) |
| Fire (5km) | | -0.065* (0.038) | | |
| Fire (5km-10km) | | -0.057* (0.033) | | |
| Observations | 444,772 | 444,772 | 356,621 | 43,983 |
| R-squared | 0.126 | 0.126 | 0.126 | 0.496 |
| Firm controls | YES | YES | YES | YES |
| Ind.-Municipality-Size-Time FE | YES | YES | YES | YES |

- $\Delta Credit_{f,t+1}$: log change in the amount of firm $f$'s outstanding credit between Dec of year $t-1$ and Dec of year $t+1$.
- $Fire_{f,t}$ is a dummy=1, if the firm is in the affected area.
- Col (4) based on loan applications.

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## Credit supply by local banks after a fire

**Hypothesis 2:** *Local banks reduce lending to firms to a significantly lesser extent than outsider banks.*

| Dep. Var.: $\Delta Credit_{f,b,t+1}$ | (1) | (2) | (3) | (4) |
|---|---|---|---|---|
| Prop Credit $\times$ Fire | 0.324*** | 0.358*** | 0.349*** | 0.308*** |
| | (0.069) | (0.071) | (0.073) | (0.066) |
| Bank Market Share $\times$ Fire | | | | 0.210 |
| | | | | (0.188) |
| Observations | 664,960 | 663,481 | 653,201 | 664,960 |
| R-squared | 0.441 | 0.449 | 0.465 | 0.441 |
| Firm-Time FE | YES | YES | YES | YES |
| Bank-Province-Time FE | YES | YES | NO | YES |
| Bank-Industry-Time FE | NO | YES | NO | NO |
| Bank-Industry-Province-Time FE | NO | NO | YES | NO |

## Credit supply by local banks after a fire depending on their lending opportunities to reallocate credit

*Local banks' credit supply to fire-affected firms is **not driven** by their **lack of lending opportunities** out of the affected area.*

| Dep. Var.: $\Delta Credit_{f,b,t+1}$ | (1) Sales Low LO | (2) Sales High LO | (3) GVA Low LO | (4) GVA High LO |
|---|---|---|---|---|
| Prop Credit $\times$ Fire | 0.468*** | 0.226** | 0.467*** | 0.227** |
| | (0.084) | (0.087) | (0.084) | (0.087) |
| | | | | |
| Observations | 119,854 | 545,092 | 116,442 | 548,506 |
| R-squared | 0.429 | 0.443 | 0.429 | 0.443 |
| Firm-Time FE | YES | YES | YES | YES |
| Bank-Prov-Time FE | YES | YES | YES | YES |

● Two groups based on **lending opportunities (LO)** in the province: Low if $LO_{p,t-1}$ is in the bottom quintile of the distribution and high if $LO_{p,t-1}$ is above the 20th percentile.

# Credit supply by local banks. The role of other bank characteristics

*Only the **fraction of credit in a specific province** leads to a significant differential effect.*

| Dep. Var.: $\Delta Credit_{f,b,t+1}$ | (1) | (2) | (3) | (4) | (5) |
|---|---|---|---|---|---|
| Prop Credit $\times$ Fire | 0.324*** | 0.219*** | 0.290** | 0.328*** | 0.306** |
| | (0.069) | (0.081) | (0.110) | (0.091) | (0.118) |
| Fire | | -0.082** | | | |
| | | (0.031) | | | |
| TA $\times$ Fire | | | -0.007 | | -0.006 |
| | | | (0.013) | | (0.023) |
| IRB $\times$ Fire | | | | 0.003 | 0.015 |
| | | | | (0.052) | (0.072) |
| Cap $\times$ Fire | | | | | 0.437 |
| | | | | | (0.621) |
| ROA $\times$ Fire | | | | | -3.578 |
| | | | | | (8.245) |
| | | | | | |
| Observations | 664,960 | 892,942 | 664,960 | 664,960 | 664,960 |
| R-squared | 0.441 | 0.146 | 0.441 | 0.441 | 0.441 |
| Firm-Time FE | YES | NO | YES | YES | YES |
| Ind.-Municipality-Size-Time FE | NO | YES | NO | NO | NO |
| Bank-Province-Time FE | YES | YES | YES | YES | YES |

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# Credit supply by local banks after a fire and relationship lending

**Hypothesis 2 (cont'd):** *Local banks provide more credit to firms with **stronger relationships** but also lend to affected firms without prior relationships (credit supply due to **soft information** rather than **evergreening**).*

| Dep. Var.: | | $\Delta L_{f,b,t+1}$ | | Dummy $L_{f,b,t-1} > 0$ |
|---|---|---|---|---|
| | (1) | (2) | (3) | (4) |
| | All | Low rel. lending | High rel. lending | All |
| | | | | |
| LocalBank $\times$ Fire | 0.324*** | 0.136 | 0.214** | -0.033** |
| | (0.069) | (0.101) | (0.088) | (0.016) |
| Observations | 664,960 | 288,031 | 181,891 | 208,577 |
| R-squared | 0.441 | 0.509 | 0.608 | 0.502 |
| Firm-Time FE | YES | YES | YES | YES |
| Bank-Province-Time FE | YES | YES | YES | YES |

# Credit supply by local banks firms without previous bank debt

*The soft information is further confirmed when we study credit supply by local banks to **firms without previous bank debt**.*

| Dep. Var.: $\Delta Credit_{f,b,t+1}$ | (1) All | (2) Distressed | (3) Non-distr. |
|---|---|---|---|
| Prop Credit $\times$ Fire | 0.220** | -0.439 | 0.227** |
|  | (0.092) | (0.454) | (0.113) |
| Observations | 55,950 | 3,389 | 49,904 |
| R-squared | 0.361 | 0.464 | 0.367 |
| Ind.-Municipality-Size-Time FE | YES | YES | YES |
| Bank-Province-Time FE | YES | YES | YES |

- This table considers only firms that had no bank debt in year $t-1$ and that applied for it in either year $t$ or $t+1$

# Credit supply by local banks to opaquer firms after a fire

**Hypothesis 2 (cont'd):** *Local banks lend significantly more to opaque firms than outside banks.*

| Dep. Var.: $\Delta Credit_{f,b,t+1}$ | (1) All | (2) More opaque | (3) Less opaque |
|---|---|---|---|
| Prop Credit $\times$ Fire | 0.301*** | 0.382** | 0.247 |
| | (0.077) | (0.163) | (0.196) |
| | | | |
| Observations | 590,683 | 114,001 | 117,853 |
| R-squared | 0.427 | 0.453 | 0.470 |
| Firm-Time FE | YES | YES | YES |
| Bank-Province-Time FE | YES | YES | YES |
| Relative Economic Effect | 0.019 | 0.024 | 0.015 |

- Opacity based on **accruals**: the higher the accruals the worse the quality of income reporting.
- Credit supply of local banks flows to **more opaque but non-distressed** firms (no misallocation) ▸ go to

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## Quality deterioration of loans granted by local banks

**Hypothesis 3:** *Local banks do not take more risk after a climate shock.*

| Dep. Var.: $NPL_{b,m,i,t+2}$ | (1) | (2) |
|---|---|---|
| Prop Credit | -0.022 | -0.049 |
| | (0.052) | (0.515) |
| Observations | 5,459 | 5,304 |
| R-squared | 0.397 | 0.449 |
| Avg Firm controls | YES | YES |
| Ind-Municipality-Time FE | YES | YES |
| Bank-Time FE | YES | YES |
| Bank-Province FE | NO | YES |

- We consider only the firm-bank pairs featuring no credit relationship before the fire.
- We compare the proportion of doubtful plus non-performing loans (NPL) at $t + 2$ of banks to firms in areas affected by a fire depending on the concentration of their credit in the corresponding province.

## Contribution of local banks to mitigate the negative consequences of fires on firms' employment

**Hypothesis 4:** *Employment in fire-affected areas served by local banks does not decrease significantly after a fire.*

| Dep. Var.: $\Delta Employm_{f,t+2}$ | (1) All | (2) Local banks $> 90\%$ | (3) Non-local banks $> 90\%$ |
|---|---|---|---|
| Fire | -0.013* | -0.006 | -0.018* |
| | (0.007) | (0.012) | (0.010) |
| Observations | 466,455 | 206,297 | 260,158 |
| R-squared | 0.136 | 0.119 | 0.150 |
| Firm controls | YES | YES | YES |
| Ind.-Municipality-Size-Time FE | YES | YES | YES |

- Dependent var.: Growth of the average number of employees at the firm level between $t-1$ and year $t+2$.
- Cols (2)-(3): Local banks defined as those with more than 90% of its credit balance in the province where the firm is located.

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## Conclusions

- The main **mechanism affecting bank credit allocation after a wildfire** is different access to information (soft vs hard) by local and outsider banks in their lending decisions.

- The access to **soft information** allows **local banks** to limit their lending less without incurring greater risk.

- Our results suggest that local banks play a critical **role in mitigating the effects of climate shocks in the economy**.

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# Credit supply by local banks after a fire. Alternative samples I

| Dep. Var.: $\Delta Credit_{f,b,t+1}$ | (1) | (2) | (3) | (4) | (5) | (6) | (7) |
|---|---|---|---|---|---|---|---|
| Prop Credit × Fire | 0.324*** | 0.333*** | 0.368*** | 0.204** | 0.357*** | 0.351*** | 0.280** |
| | (0.069) | (0.079) | (0.085) | (0.093) | (0.077) | (0.100) | (0.133) |
| Observations | 664,960 | 602,081 | 386,420 | 249,815 | 584,866 | 447,554 | 215,373 |
| R-squared | 0.441 | 0.437 | 0.452 | 0.449 | 0.450 | 0.428 | 0.494 |
| Firm-Time FE | YES | YES | YES | YES | YES | YES | YES |
| Bank-Province-Time FE | YES | YES | YES | YES | YES | YES | YES |

- (1) Same as column (1) in hypothesis 2 table for comparability reasons.
- (2) Affected firms restricted to first-time fire-damaged firms.
- (3) Only firms the first year that they appear in the sample.
- (4) Control group: radius +10km to +20km (instead of +20km to +40km).
- (5) Firms that have not received subsidies in $t$ and $t+1$.
- Include firms with ratio of tangible assets over TA below (6) and above (7) the median ratio each year.

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# Credit supply by local banks after a fire. Alternative samples II

| Dep. Var.: $\Delta Credit_{f,b,t+1}$ | (8) | (9) | (10) | (11) | (12) |
|---|---|---|---|---|---|
| Prop Credit $\times$ Fire | 0.320*** | 0.213*** | 0.423*** | 0.284*** | 0.486*** |
| | (0.113) | (0.078) | (0.139) | (0.061) | (0.109) |
| Observations | 472,517 | 343,486 | 315,683 | 462,978 | 149,405 |
| R-squared | 0.465 | 0.434 | 0.457 | 0.471 | 0.389 |
| Firm-Time FE | YES | YES | YES | YES | YES |
| Bank-Province-Time FE | YES | YES | YES | YES | YES |

- Column (8) excluding firms that had credit with any type of guarantee.
- Column (9) based on firms located in municipalities with low probability of wildfires whereas column (10) is obtained using municipalities with higher probability.
- Column (11) includes the less strategic firms (based on their employment relative to total employment in the province) whereas column (12) considers more strategic firms.

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# Credit supply by local banks to opaquer and distressed firms after a fire

| Dep. Var.: $\Delta Credit_{f,b,t+1}$ | (1) More opaq All | (2) More opaq Distressed | (3) More opaq Non-distr. | (4) Red. quest All | (5) Red. quest Distressed | (6) Red. quest Non-distr. |
|---|---|---|---|---|---|---|
| Prop Credit × Fire | 0.382** | 0.152 | 0.424*** | 0.332*** | 0.317 | 0.334*** |
| | (0.163) | (0.313) | (0.157) | (0.064) | (0.243) | (0.081) |
| Observations | 114,001 | 12,351 | 100,316 | 608,003 | 62,856 | 543,307 |
| R-squared | 0.453 | 0.584 | 0.447 | 0.451 | 0.561 | 0.442 |
| Firm-Time FE | YES | YES | YES | YES | YES | YES |
| Bank-Province-Time FE | YES | YES | YES | YES | YES | YES |

- Opaque firms are split in distressed (**negative equity**) vs. non-distressed <span>◂ return</span>

# The **ENGAGE** Portal

Gijs Verschuur

Hypoport

# The ENGAGE Portal

- The ENGAGE Portal will enable lending institutions to **upload and assess the alignment of their loan portfolios with the EU Taxonomy**.

- The Portal incorporates detailed **loan** and **collateral level checks**.

- Access to multiple stakeholders (internal reporting, rating agencies, investors, regulatory supervisors, etc.) upon invitation.

- The ENGAGE Portal will enable users to assess multiple portfolios based on the EU Taxonomy.

- The Portal output is twofold:

  1. The **data quality feedback**;

  2. The **EU Taxonomy alignment report**.

- **Trial access** available subject to a standard legal arrangement (available upon request).
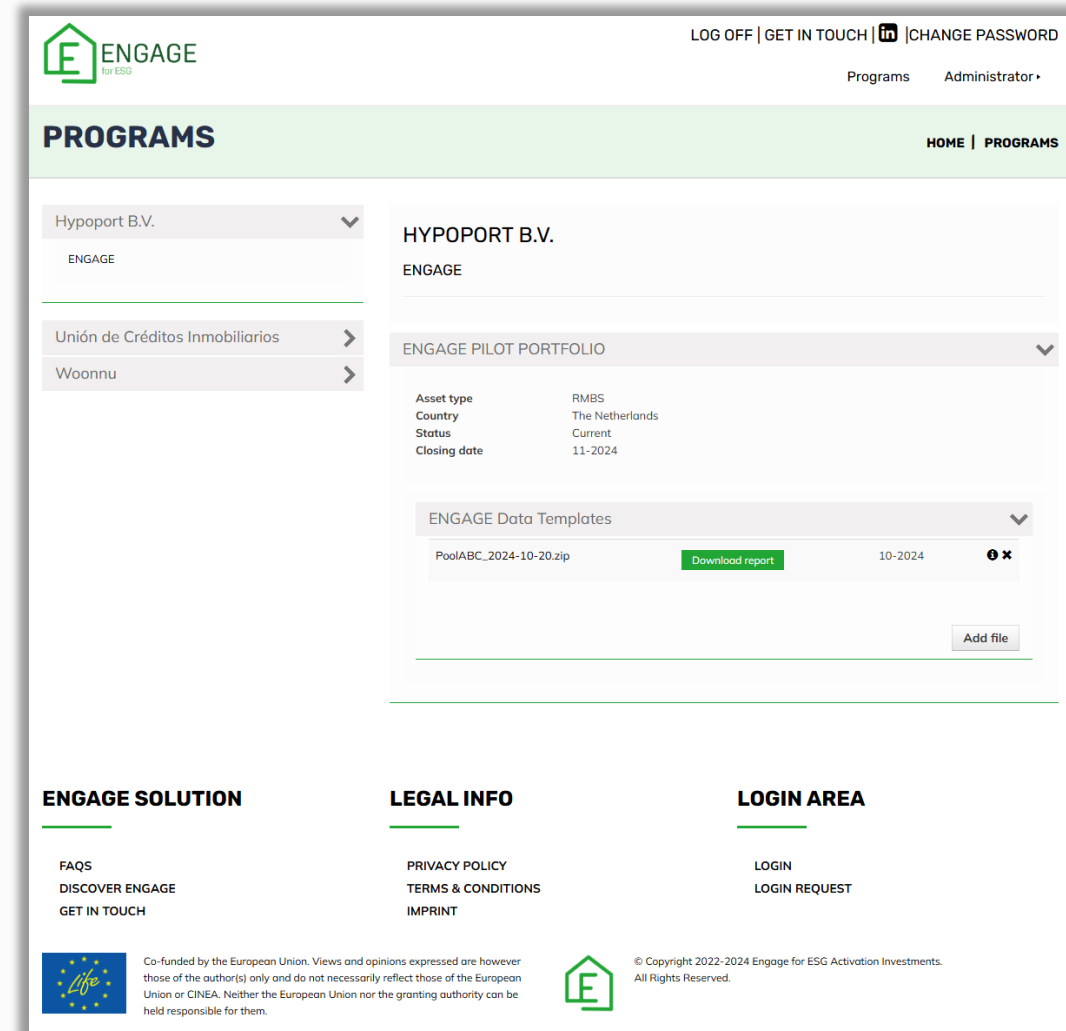
# ENGAGE Portal output: data quality report (1/2)

| Rule Description | Number of Fails |
|---|---:|
| Primary Energy Demand (PED) of the building (EREC14) equal to ND5 when Nearly zero-energy building (NZEB) theshold (EREC18) populated | 34,720 |
| Top15_Explanatory Variable (EREC22) equal to ND5 when Building unit in top-15% indicator (EREC21) is equal to 'Yes' | 8,999 |
| Top15_Object Reference Value (EREC23) equal to ND5 when Building unit in top-15% indicator (EREC21) is equal to 'Yes' | 8,999 |
| Issuance date of most recent available Energy Performance Certificate (EPC) registration (EREC9) earlier than Construction Year (EREC5) | 2,711 |
| Construction Year (EREC5) earlier than the Date of the Construction permit application date (EREC6) | 1,368 |
| Construction Year (EREC5) earlier than or equal to 1900-01-01 | 980 |
| Estimated or officially produced Primary Energy Demand (EREC15) equal to ND5 when General Activity Designation (EREC4) is equal to 'Construction of new buildings' | 677 |
| Primary Energy Demand (PED) of the building (EREC14) equal to ND5 when General Activity Designation (EREC4) is equal to 'Construction of new buildings' | 677 |
| Issuance date of most recent available Energy Performance Certificate (EPC) registration (EREC9) earlier than Construction permit application date (EREC6) | 47 |
| Building unit in top-15% indicator (EREC21) is equal to 'Yes' when Construction permit application date (EREC6) after 31 December 2020 | 7 |

**Data quality report output by single position**

# ENGAGE Portal output: EU Taxonomy alignment report (2/2)



First overview of the ENGAGE – EU Taxonomy alignment report. Portraying a breakdown of Technical Screening Criteria assessment as per economic (sub) activity

# The gate to the ENGAGE Portal

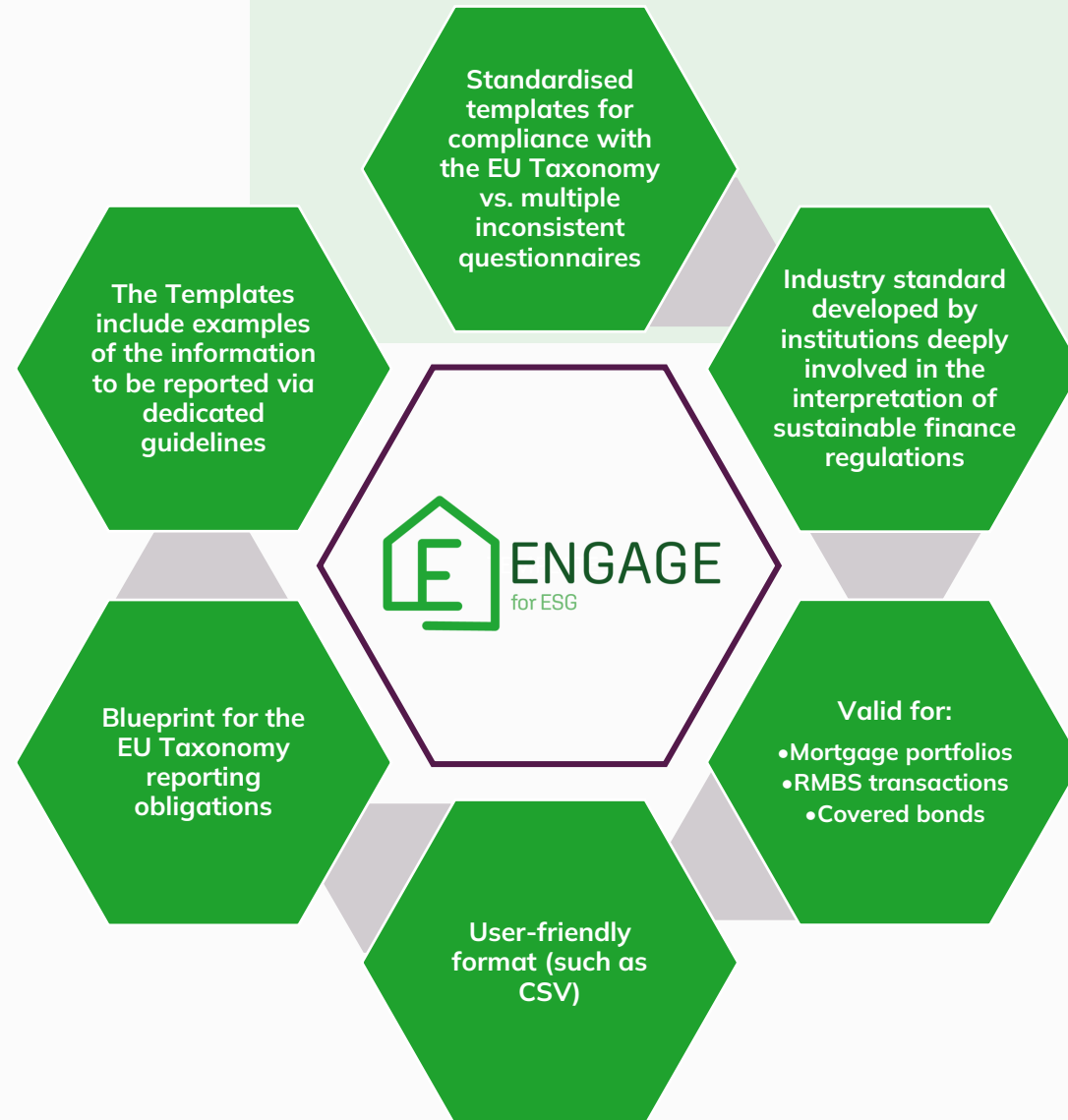# What' next with ENGAGE for ESG

**Maitane Puente González**

**European DataWarehouse**
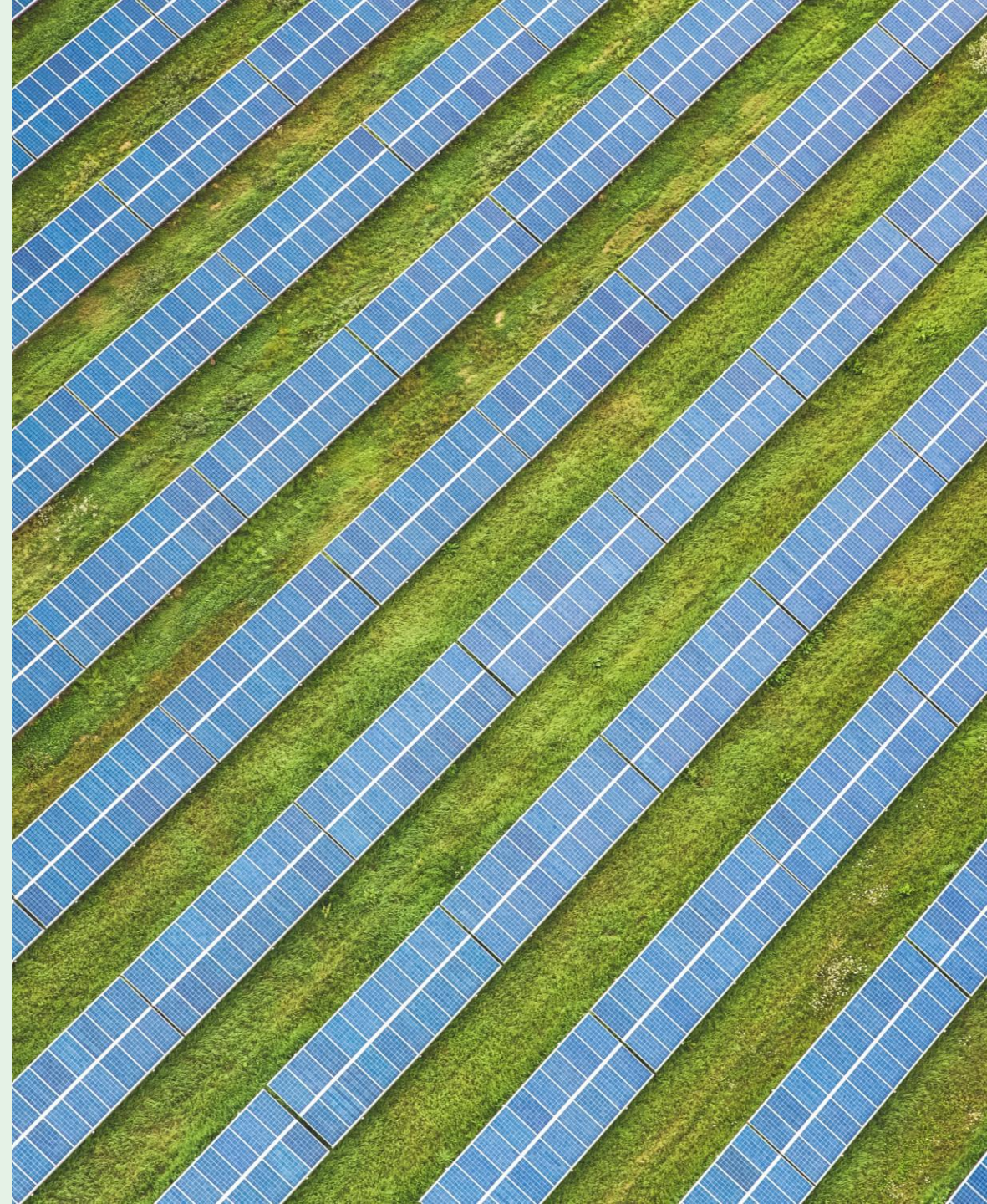
# Why become a Trial User via the Portal



Standardised templates for compliance with the EU Taxonomy vs. multiple inconsistent questionnaires

The Templates include examples of the information to be reported via dedicated guidelines

Industry standard developed by institutions deeply involved in the interpretation of sustainable finance regulations

Blueprint for the EU Taxonomy reporting obligations

Valid for:
- Mortgage portfolios
- RMBS transactions
- Covered bonds

User-friendly format (such as CSV)

ENGAGE
for ESG

# Free ENGAGE trial period until October 2025

**Request ENGAGE Templates**

- Version 1.1 available now through <u>Request for Access to the ENGAGE Templates</u>
- **70 institutions** have requested access to the ENGAGE Templates

**ENGAGE Demonstration**

- The ENGAGE Team is available for clarifications on the ENGAGE Templates

**Submission to ENGAGE Portal**

- Signature of a <u>standard legal arrangement</u> for the safe processing of the data
- Possibility to submit the ENGAGE sample files various times enriching the information

**Output Reports**

- For each sample file submission two reports are generated: 1) a data quality report; 2) an EU Taxonomy alignment report.

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# Upcoming Events

**Upcoming In-Person Events:**

- **Tendencias hacia la simplificación del reporting de sostenibilidad: la solución ENGAGE for ESG** – Madrid, 7 May 2025. Register now here!

**Upcoming ENGAGE Webinars:**



Register here: 2025 ENGAGE Webinar Series: Session IV – ENGAGE4ESG

**ENGAGE** for ESG

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engage4esg.eurodw.eu/

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