ESG Rating Corporate Finance

Startup specialized in planning, implementation, reporting and ESG controlling for SMEs

There is no real effectiveness or evidence of economic value creation in your sustainability report without strategic planning that includes the relevant ESG factors and action plans for risk mitigation.

CONTROLLING | ESG | FINANCE

www.esg-rating.it | info@esg-rating.it | Italy

Our services

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ESG Management Model and Sustainability Report

Design of a sustainable management model and drafting of the Sustainability Report according to EU standards (simplified ESRS for large companies – full VSME for SMEs)

The service supports the company through a **structured path of sustainability integration** into business strategy and processes, combining analysis, design, reporting and support for stakeholder communication.

The work begins with a **strategic and operational context analysis**, internal and external, aimed at understanding the company's positioning and the dynamics of its sector. On this basis we carry out the **materiality analysis**, identifying the **ESG and business development topics** relevant to the specific business.

Next comes the phase of **ESG data collection on a digital platform**, with **automatic calculation of CO_2 Scope 1, 2 and 3 emissions**, and the **definition of Environmental, Social and Governance Policies**, accompanied by **indicators and targets** for a sustainable development plan.

The path concludes with the **drafting of the Sustainability Report**, in which the **strategic corporate vision** is linked to the **opportunities and risks** of the ESG plan integrated into the Business Plan. The service is completed by **support for stakeholder communication** and **assistance with data assurance** by a third-party body or sustainability auditor.

ESG Management Model and Sustainability Report

Design of a sustainable management model and drafting of the Sustainability Report according to EU standards (simplified ESRS for large companies – full VSME for SMEs)

What this service enables:

Financial and commercial stakeholders require structured evidence on sustainability performance. Our service makes it possible to:

- Move beyond a **merely formal ESG reporting**, integrating it into business management
- Link the **economic-financial strategy** to the development opportunities offered by the **relevant ESG topics** for the sector
- Manage **energy and raw-material risks** with **energy transition** and **circular economy plans**
- Leverage the **improvement of working conditions** as a lever for productivity and business continuity

Why you should choose this service:

Sustainability as a value lever — ESG topics contextualized in the management model become concrete factors of development and value creation in the medium-to-long term, not mere obligations.
Compliant and recognized reporting — drafted according to EU standards recognized by financial stakeholders (simplified ESRS / VSME), for full credibility with banks, investors and clients.
Integrated risk-opportunity vision — the ESG plan is linked to the Business Plan, with a unified reading of risks, investments and expected returns.
End-to-end support — from context analysis to third-party assurance, with knowledge transfer to the internal team.

ESG Assessment and Risk Management

Preliminary assessment for introducing an ESG Risk Management model into the company control system

The service is a **structured preliminary assessment** that enables the company to understand the **weaknesses of its management model** against a sustainable management standard, mapping both the **strategic directional risks** specific to the business segment, and the **operational risks** in the areas of environment, health and safety, human and social rights at work, ethics, legality and continuity of business conduct.

The work is based on a **detailed ESG risk checklist** developed in-house, which identifies the most suitable approaches to reduce risk exposure and implement a **PDCA system** to support the management and monitoring of material topics and the sustainability plan.

We deliver to the client a **Gap Analysis** with the assessment of the **areas of strength** and the **areas requiring risk mitigation**, accompanied by the evidence to be produced to obtain a **positive assessment opinion** from the third-party body validating the ESG model.

The service is completed by a **summary Report** containing a **plan of ESG risk-mitigation actions**, operationally usable by the corporate sustainability team as an improvement roadmap.

ESG Assessment and Risk Management

Preliminary assessment for introducing an ESG Risk Management model into the company control system

What this service enables:

The assessment is the first concrete step to align the company with the ESG requirements demanded by **certification bodies, market leaders and financial institutions**. Our service makes it possible to:

- Plan a **customized ESG improvement plan**, aimed at a positive assessment certified by a third party or at the **ISO 17029 rating** recognized by MASE for award criteria in public tenders
- Improve **competitive positioning** as a supplier or sub-supplier in the value chains of **market leaders** that select supply relationships also on compliance with ESG principles
- Activate **lower-cost bank credit lines** and/or **subsidized finance measures** linked to the company's ESG development project

Why you should choose this service:

Clear view of ESG risks — thanks to the structured gap analysis, the company obtains a precise mapping of strengths and the weaknesses to address, with the evidence required for third-party validation.

Preparation for the certified assessment — the service anticipates and structures all the activities needed to successfully face the third-party audit, reducing time, costs and the risk of negative outcomes.

Better access to market and credit — a validated ESG profile opens commercial opportunities (supply to market leaders, public tenders) and financial ones (subsidized credit lines, PNRR).

Concrete action plan — the final Report provides the internal team with a clear, immediately operational risk-mitigation roadmap.

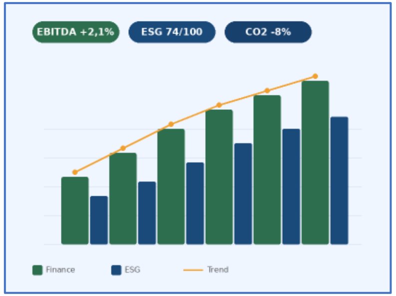
ESG Rating

Startup specialized in Management Control and ESG Reporting for Italian SMEs

NON-FINANCIAL REPORTING TOOLS

Integrated Performance Management

Development of a management information system for data collection and analysis of Economic/Financial and ESG indicators



The service takes the form of a **consulting and implementation journey** that guides the client from the definition of the **measurement model** through to the go-live of the supporting **information system**.

On the consulting side, we support the company in designing a **truly integrated performance framework**, in which **economic-financial indicators and ESG KPIs** coexist within the same **logical and information model**. The work includes the **identification of the most relevant indicators** across both dimensions, the definition of their **correlations and interdependencies**, the design of the underlying **data model**, the construction of **management and operational reports** capable of representing financial and sustainability performance in a unified way. The goal is to build a KPI system **consistent with the corporate strategy**, the sector context and the **reporting obligations**, while ensuring **managerial significance and traceability**.

On the implementation side, we build the **IT system** supporting **data collection**, **indicator calculation** and **report production**. The implementation is **technologically neutral**: we can **leverage the platforms already present in the company** — avoiding duplication and protecting prior investments — or propose **market solutions** selected according to specific needs of **scalability, integration and data governance**. In both cases, we favor established tools in the field of **data integration, analytics and artificial intelligence**, ensuring **continuity and maintainability** over time.

The working method is **incremental and collaborative**: we proceed through **progressive releases**, involving the **business and IT functions** of the client at every stage, so as to ensure **effective adoption**, **knowledge transfer** and **capacity for autonomous evolution** of the solution.

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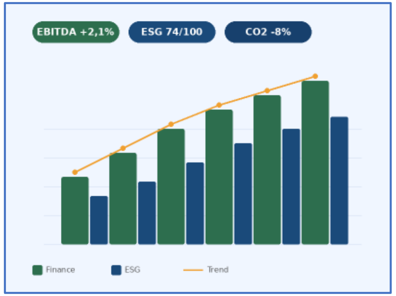


What this service enables:

In a context where **sustainability** and **economic-financial performance** are increasingly interconnected, companies need tools able to manage in a unified way **data**, **processes** and **decisions**. Our **Enterprise Performance Management** service meets this need, making it possible to:

- **Automatically correlate economic-financial indicators** and **ESG KPIs** in a single integrated information system
- Have **reports** and **dashboards** updated periodically, with automatic alerts to managers in case of deviation from targets
- Support the **processes** of **Forecast** and **Budget** through comparable and traceable forecast scenarios
- **Accelerate** the production of **comments** and **analyses** of deviations thanks to artificial-intelligence features

Why you should choose this service:

Decisions based on reliable data — thanks to the automatic integration of sources, the client works on consistent and reliable information, eliminating manual errors and reducing the risk of choices based on incomplete or inconsistent data.

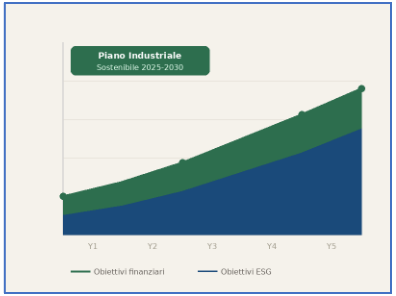
More time for what truly matters — people are freed from the repetitive tasks of collection and reconciliation, able to devote their energy to the analyses and decisions that generate real value

A single command over performance and sustainability — the client has a management dashboard that integrates financial and ESG indicators with the same logic and frequency, ensuring an overall view

Solid technologies — the adoption of established market tools in the field of data integration, analytics and AI ensures reliability, scalability and continuity

Development of Sustainable Business Plans

Integration of the ESG plan into the corporate Business Plan and financial evaluation of sustainability investments



In **energy-intensive companies exposed to consumption from non-renewable sources**, the process of **environmental risk mitigation** cannot remain confined to a reporting exercise: it must find its output in a **corporate sustainability plan** fully integrated into **traditional medium-to-long-term business plans**.

The service supports the **company's CFO** in integrating ESG performance into financial planning, linking the **corporate investment plan** to **future ESG improvement actions** and translating sustainability objectives into measurable economic and financial metrics.

On the operational side, we **quantify the type and scale of the monetary requirement** for ESG investment expenditure and assess **where and at what cost to source the necessary capital**, analyzing the various available sources (subsidized finance, bank credit, risk capital) according to the project characteristics.

Finally, we measure the **financial sustainability** and the **economic return of ESG investments** through financial-analysis metrics — debt sustainability, return on invested capital — in support of a **positive opinion from investors and credit intermediaries**.

Development of Sustainable Business Plans

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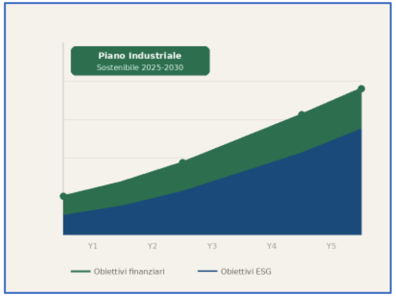

What this service enables:

The sustainability plan becomes feasible only when the **capital requirement for ESG investments** finds full financial justification. The service makes it possible to:

- Quantify the **ESG Capex** needed for medium-to-long-term action plans
- Integrate the **ESG plan into the Business Plan**, in line with the **VSME EFRAG standards**
- Assess the **economic-financial feasibility** of ESG projects with debt-sustainability and profitability metrics
- Present the project to **banks, investors and subsidized finance** with the credibility required for a positive opinion

Why you should choose this service:

Concretely financeable ESG strategy — the sustainability plan becomes an investment project with clear economic-financial metrics, presentable to banks and investors.
Full integration with the Business Plan — ESG actions enter the traditional business plan, avoiding the fragmentation between sustainability and economic planning.
Easier access to capital — a financially sound ESG project opens dedicated credit lines, subsidized finance and risk capital on favorable terms.
Direct support to the CFO — the service is designed around the needs of the finance department, compatible with corporate planning processes.

ESG Training for SMEs

Strategic planning, implementation and reporting of a sustainable business model

Integrated Management System (QSA) managers and Controllers will be able to identify the relevant ESG topics and implement a corporate control model no longer limited to monitoring accounting parameters, but extended to **risk management**, with planning of risk mitigation for stakeholders and business continuity in a **forward-looking** way typical of credit and financial analysis.

The path relates to the financial needs of **SME CFOs** for activating **dedicated instruments and credit lines**, PNRR **subsidized finance measures** and channels to seek **risk capital** (Private Equity and Venture Capital).

The course is also aimed at **Sustainability Managers of Benefit Corporations** who, having already introduced a corporate sustainability policy, intend to evolve their reporting towards a **Sustainability Report** compliant with the CSRD parameters transferred into the VSME for SMEs.

The course is organized into **6 training modules**:

- **Module 01 – Context analysis and material topics:** ESG risk, double materiality, stakeholder engagement, IRO
- **Module 02 – Regulatory framework:** CSRD, Legislative Decree 125/2024, Stop the Clock, VSME, value chain
- **Module 03 – Environmental policy:** climate, pollution, water, biodiversity, circular economy
- **Module 04 – Social policy:** workforce, value chain, communities, consumers
- **Module 05 – Governance policy:** ESG structures, risk management, control bodies, business conduct
- **Module 06 – ESG Finance:** Capex/Opex, EU Taxonomy, creditworthiness

ESG Training for SMEs

Strategic planning, implementation and reporting of a sustainable business model

What this service enables:

The training path provides corporate teams with the **operational skills** to integrate sustainability into management and strategic planning. By the end of the course, participants are able to:

- Implement an **integrated management-control model**, from strategic and operational risks to current and forecast financial effects
- Draft a **voluntary Sustainability Report** compliant with EU Directive 2464/2022 CSRD, proportionate to the SME structure according to the **VSME EFRAG standard**
- Build a **sustainable-development Business Plan** integrated with ESG policies and economic-financial feasibility logic

Why you should choose this service:

Operational focus — the course is not limited to the regulatory framework but transfers tools and methods immediately applicable in management control and corporate reporting.
Integrated risk-finance vision — ESG topics are addressed in a forward-looking way, with language consistent with that of credit and financial analysis.
Compliance with the new EU standards — the contents are aligned with CSRD, VSME EFRAG and the expectations of banks, investors and clients along the value chain.
Modular and flexible format — you can attend the entire path or individual modules of interest, with discounts for multiple contacts from the same company.