



**Recognition for real carbon reduction**



# Agenda



**09.30 – 10.00 Registration**

**10.00 – 10.10 Welcome – Brendan Reid, Carbon Trust**

**10.10 – 10.35 CTS benefits & methodology – Adam Leaver**

**10.35 – 11.00 Case Study: David Stutchfield, University of St Andrews**

**11.00 – 11.20 Coffee Break (20 mins)**

**11.20 – 12.20 CTS assessment walk-through - Adam Leaver**

**12.20 – 12.45 Case Study: David Currie, Scottish Court Service**

**12.45 – 13.00 Closing remarks – Brendan Reid**

**13.00 – 14.00 Lunch and Networking**

# The Carbon Trust

Brendan Reid

[brendan.reid@carbontrust.co.uk](mailto:brendan.reid@carbontrust.co.uk)

07725 413 970

Account Manager

19<sup>th</sup> October 2009



# **Our mission is to accelerate the move to a low carbon economy**



## **We cut carbon emissions now**

- By providing business and the public sector with expert advice, finance and accreditation
- By stimulating demand for low carbon products and services

## **We cut future carbon emissions**

- By developing new low carbon technologies through project funding and management, investment and collaboration
- By identifying market barriers and practical ways to overcome them



# Advice



- Customer helpline – 0800 085 2005
- 12 free half day or full day events each year
  - [www.carbontrust.co.uk/events](http://www.carbontrust.co.uk/events)
- Carbon Times newsletter on energy and carbon topics
- Carbon Surveys to find energy and CO2 savings at sites or organisations
  - [www.carbontrust.co.uk/survey](http://www.carbontrust.co.uk/survey)
- Feasibility studies into specific projects/investment areas
- Carbon Management Programme
- Carbon Management Lite Programme

# Finance



- From the Carbon Trust
  - Interest free loans for SME's, SMB's and charities
    - [www.carbontrust.co.uk/loans](http://www.carbontrust.co.uk/loans)
  - Salix funding for HE sector
    - [www.salixfinance.co.uk](http://www.salixfinance.co.uk)
- From other sources
  - CEEF for LA sector (Scottish Government)
  - Small Business Loan for SME's and charities (Scottish Government)
  - Enhanced Capital Allowance (HMR&C)

# Accreditation



- The need for accreditation
- Carbon Trust Standard

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## **Business Benefits**



# Benefits of The Carbon Trust Standard



- Corporate reputation
- Motivation for ongoing reduction
- CRC



# The Carbon Trust Standard: demonstrating ongoing reduction year-on-year



# Example certifications to date

- 150+ certifications
- 180+ customers



**first direct**



**DIAGEO**

**Go-Ahead**

Trinity Mirror plc



# How is the Carbon Trust Standard used?



first direct

# Carbon

**Others may copy,  
but we are first**

first direct has become the first bank to be awarded the Carbon Trust Standard for carbon footprint reduction.


It's the sort of thing that makes first direct unique. We really do go the extra mile to make a difference. Solar power heats part of our building. Our PCs shut down automatically when they're not in use. More of us are cycling to work and all of us recycle when we get there.

It's the little things that matter. And they all add up to make first direct a better place to bank. Maybe that's why we've been voted number one for customer satisfaction\*.

Our friendly people are on hand to help day or night, 365 days a year. So why not copy 1,000s of happy customers and join first direct today?

first direct  
banking's better in black and white

Join us, call  
**0800 24 24 24**  
or visit  
**firstdirect.com**  
Member HSBC Group



\* Source: Institute of Customer Service, 2009.  
Because we want to make sure we're doing a good job, we may monitor and/or record our calls. We hope you don't mind. © HSBC Bank plc 2009. All rights reserved. 40 Wellesford Road, Leeds LS9 9FD.

AC-H161

- Advertising
- Website
- Email
- Annual report
- Branding
- Press releases
- Carbon Trust Standard advertising
- etc.

# How is the Carbon Trust Standard used?



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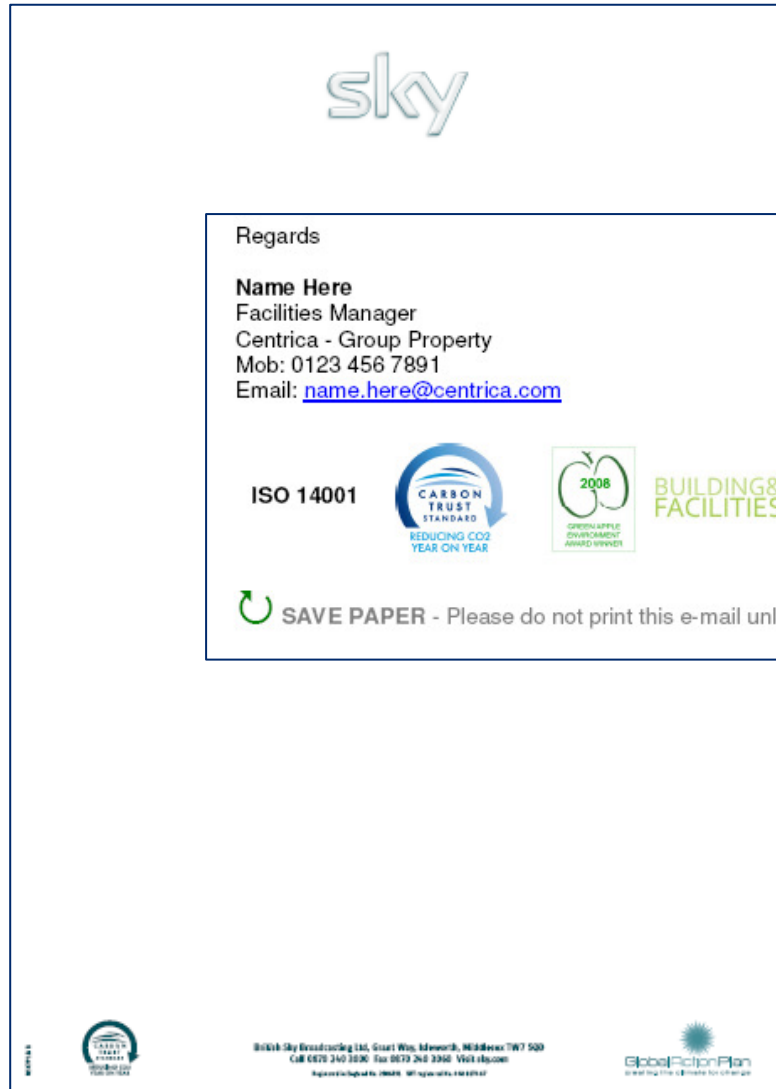
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The Carbon Trust Standard certifies that Eurotunnel has genuinely reduced its carbon footprint, and is committed to making further reductions year on year.

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- Advertising
- Website
- Email
- Annual report
- Branding
- Press releases
- Carbon Trust Standard advertising
- etc.

# How is the Carbon Trust Standard used?



- Advertising
- Website
- Email
- Annual report
- Branding
- Press releases
- Carbon Trust Standard advertising
- etc.



# Our recent marketing campaign featured some of our achievers.....



## Standard Bearers 2009

**Career highlights**  
 James Branton in 2002, after working with them for 10 weeks on a M&P project. I've been involved in a number of projects for the past 10 years, including the development of a new product line, the implementation of a new management system, and the launch of a new business. I've also worked at L&F, where I've held the position of Senior Development Manager. I've been involved in a number of projects, including the development of a new product line, the implementation of a new management system, and the launch of a new business. I've also worked at L&F, where I've held the position of Senior Development Manager. I've been involved in a number of projects, including the development of a new product line, the implementation of a new management system, and the launch of a new business. I've also worked at L&F, where I've held the position of Senior Development Manager.

**Why did you apply for the Standard?**  
 My focus at Branton is on innovation and continuous improvement. I'm looking for a challenge that will allow me to make a positive contribution to the industry. I've been involved in a number of projects, including the development of a new product line, the implementation of a new management system, and the launch of a new business. I've also worked at L&F, where I've held the position of Senior Development Manager.

**What has been the most successful thing you have achieved?**  
 The most successful thing I've achieved is the implementation of a new management system. This has been a challenge, but I've been able to lead the team through the process. I've also worked at L&F, where I've held the position of Senior Development Manager.

**What's the greatest personal challenge you face at work?**  
 The greatest personal challenge I face at work is the need to stay motivated and focused. I've been involved in a number of projects, including the development of a new product line, the implementation of a new management system, and the launch of a new business. I've also worked at L&F, where I've held the position of Senior Development Manager.

**Standard Bearer**  
 In July 2009, James Branton was named as a Standard Bearer for his work on the Carbon Trust Standard. He is a Senior Development Manager at L&F, where he has been involved in a number of projects, including the development of a new product line, the implementation of a new management system, and the launch of a new business. He is also a member of the Carbon Trust Standard Bearer network.



The University of Manchester, London Fire Brigade and Fire Council have achieved the Carbon Trust Standard by proving that they've reduced their carbon footprint. Earning it isn't easy, but it's worth it. It's a benchmark that stakeholders and staff are looking for and, as the only scheme recognised by the government's Carbon Reduction Commitment, can also mean reduced costs. Show that you're tackling climate change and join the low carbon world.

Available to download from the website:  
[www.carbontruststandard.com/UsingtheStandard/Showcase.aspx](http://www.carbontruststandard.com/UsingtheStandard/Showcase.aspx)



Join them today  
 0800 019 1443  
[www.carbontruststandard.com/join](http://www.carbontruststandard.com/join)





## Comment from our Clients



*"Achieving the Standard is a clear sign that your business is serious about reducing the impact it has on the environment."*

Chris Pilling, Head of Direct Banking at HSBC (firstdirect)

*"You simply won't get it just for creating a few spreadsheets – genuine action is required, combined with a demonstration that the board is fully behind it."*

Mark James, MD, Branstons

*"The Carbon Trust Standard allows us to demonstrate real carbon reductions year-on-year, unlike other environmental award schemes."*

David Owens, Chief Executive – Thames Water



## **Preparing for the CRC**





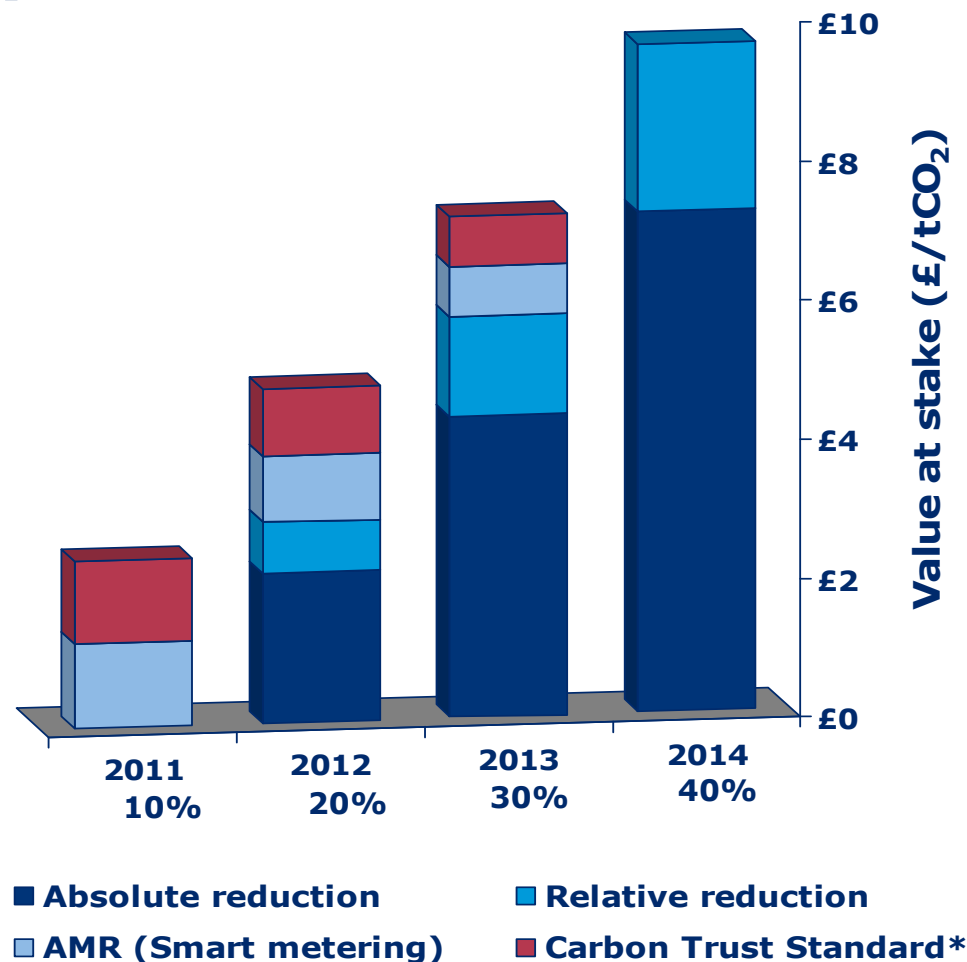
## What is the CRC?

- **Mandatory** emissions trading scheme focusing on large non-energy intensive organisations
- **Organisation** based scheme, including direct and indirect emissions
- HMT **revenue neutral** design
- Final stage of consultation just completed
- Key date for Standard bearers is 31<sup>st</sup> March 2011

# The Carbon Trust Standard is linked to initial CRC recycling payments



- 10,000 tCO<sub>2</sub>e footprint (~£1m-£1.5m energy bill)
  - £120k allowances p.a.
  - £120k 1<sup>st</sup> purchase
  - £24k at stake (2011)



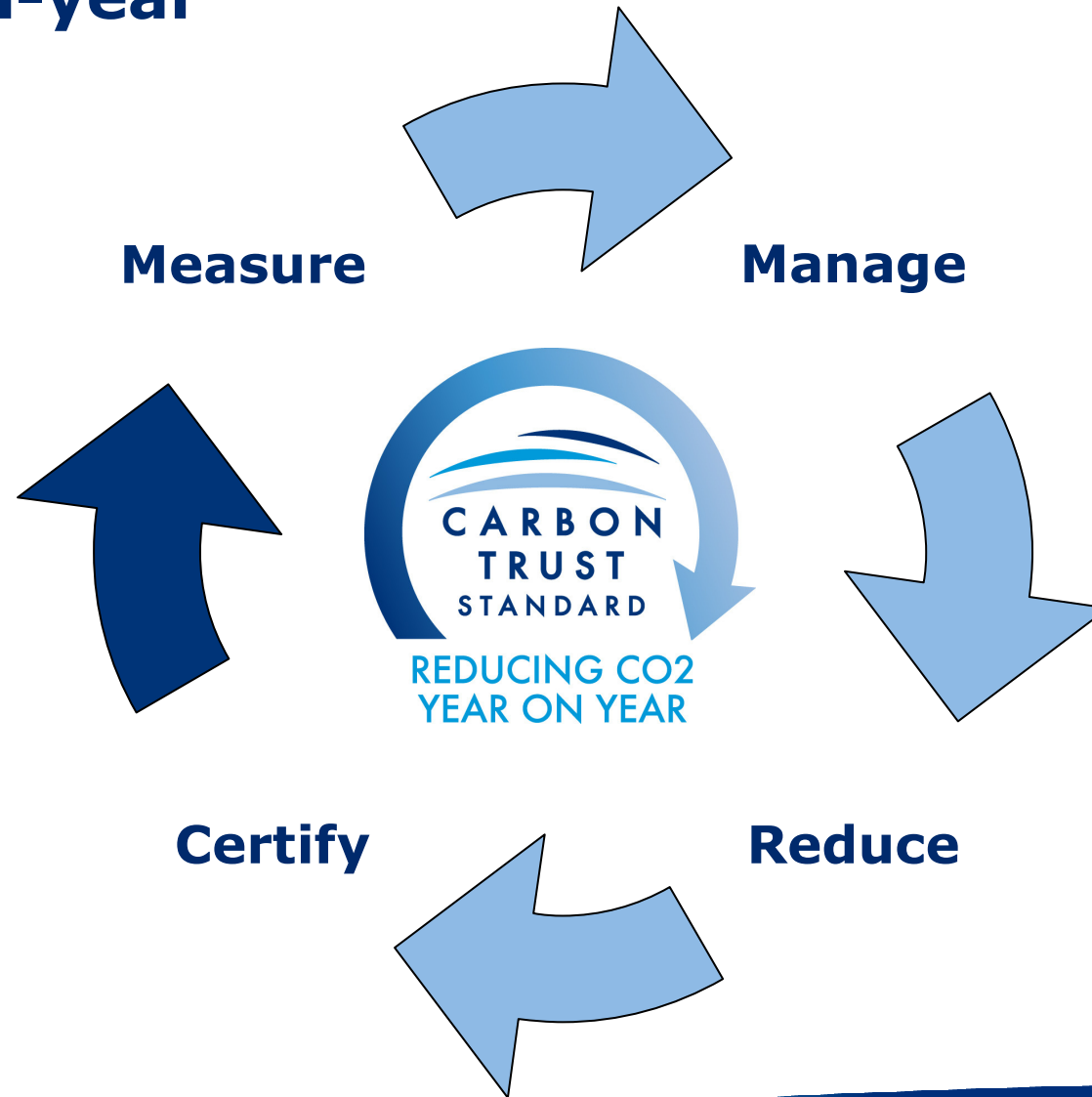
\* Or 'equivalent'  
 N.B. Figures are based on draft legislation



## **Carbon Trust Standard methodology & criteria**



# The Carbon Trust Standard: demonstrating ongoing reduction year-on-year

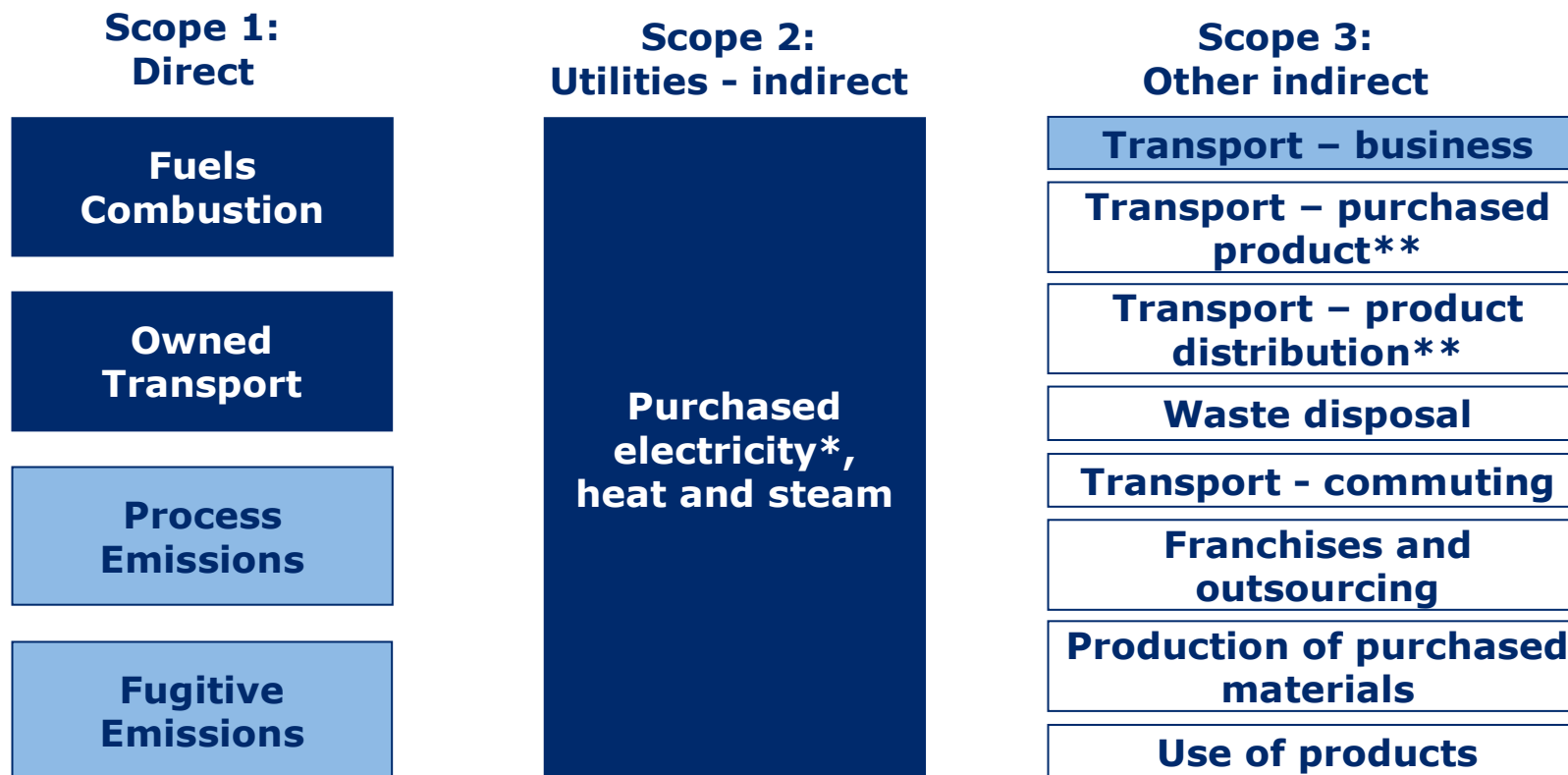


## Key decisions to make

- Boundary
  - **Organisation**
  - Business Unit
  - Sites
  
- Approach
  - Equity Share
  - Financial Control
  - **Operational Control**

# Measurement rules

Based on GHG protocol terminology



 = Minimum for Level 1  
(initial certification)

 +  = Minimum for Level 2  
(re-certification)

\* Green tariffs are treated using average grid emissions factors

\*\* From/to point of ownership transfer

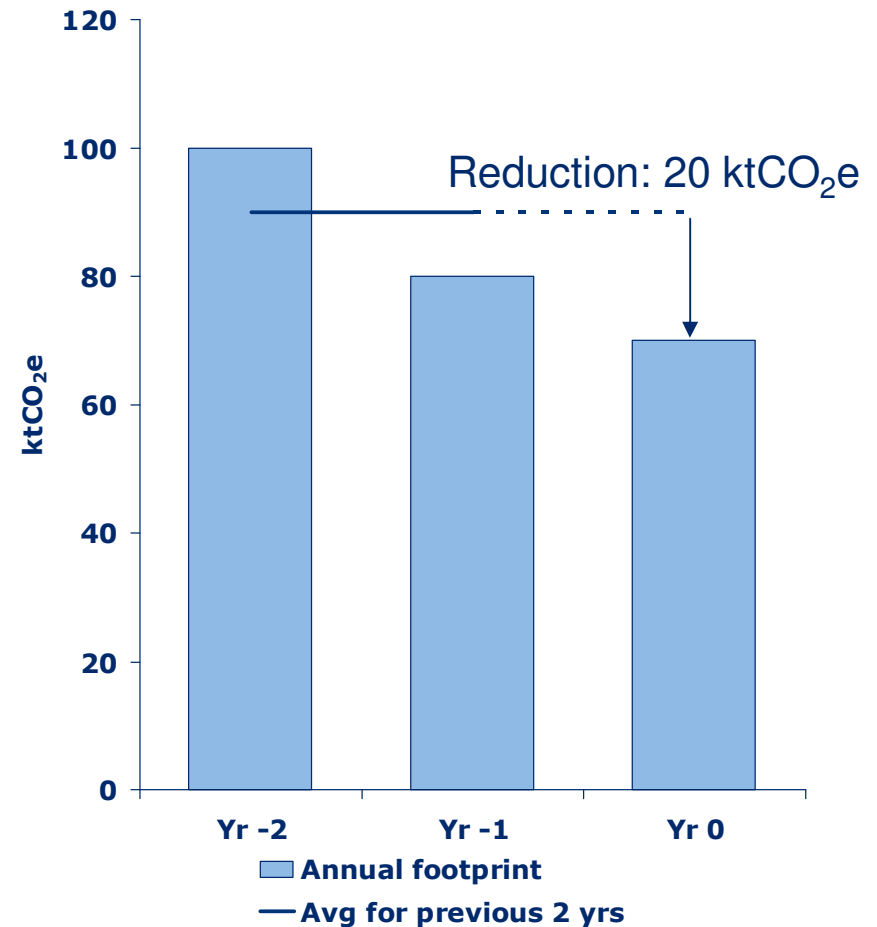


## Regular areas of concern

- Owned Vehicles
  - Information from Fleet Manager
  - Leased vehicles
  
- Fugitive Emissions
  - Maintenance schedules
  
- Business Travel
  - Information requirements

## Reduction rules

- All organisations must show a footprint reduction
- Current emissions are compared to the average for the previous 2 years
- Reduction must be shown in one of:
  - Absolute footprint in tCO<sub>2</sub>e
  - A relative benchmark such as tCO<sub>2</sub>e/£m turnover (min 2.5% per annum improvement required)





# Carbon management rules

Qualitative assessment with a 60% pass mark

## ➤ Governance

- Is there a low-carbon policy?
- Who has overall responsibility for climate change matters?
- How are emissions and reductions performance reported to stakeholders?

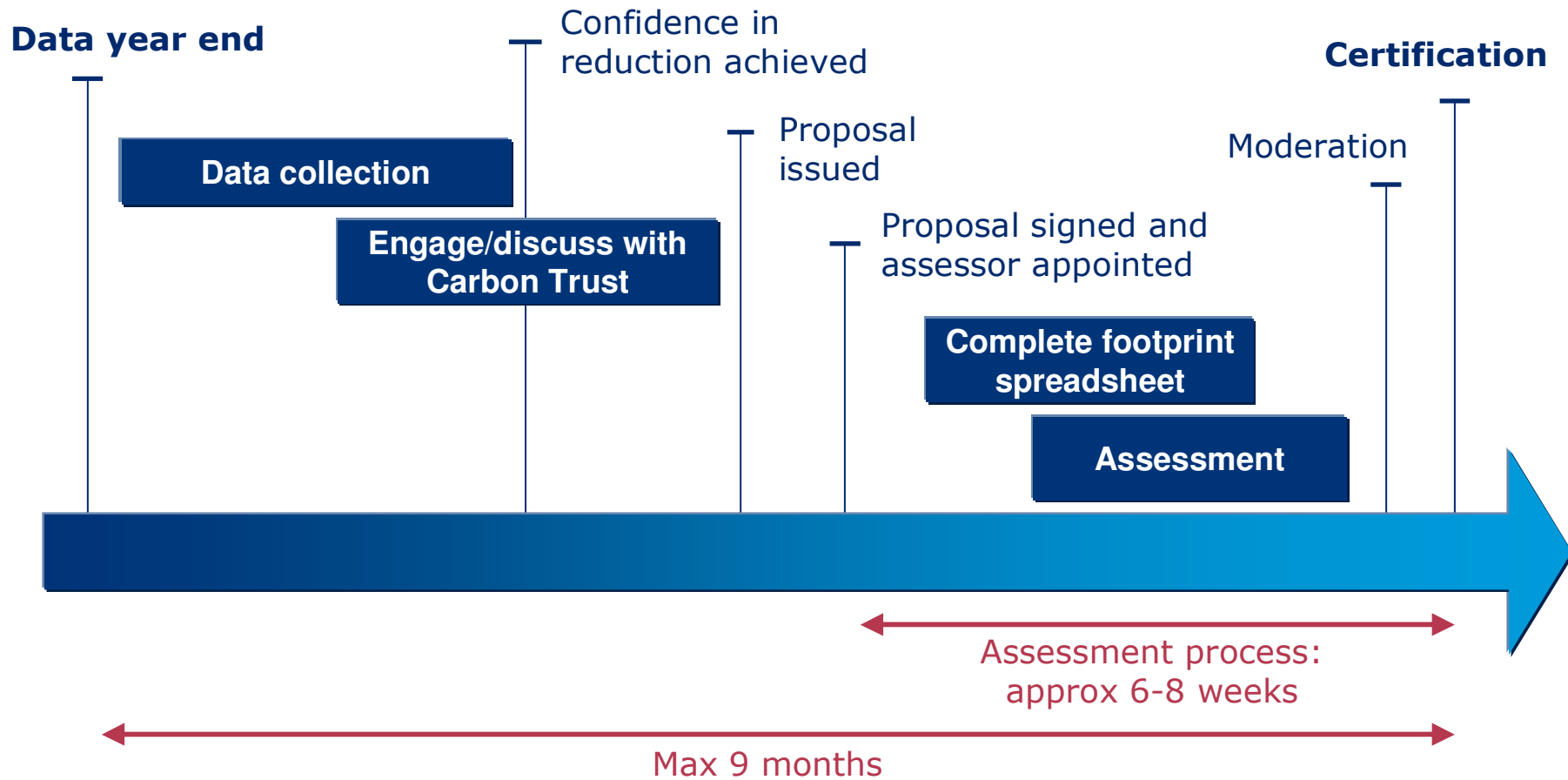
## ➤ Carbon accounting

- Are there procedures for checking and documenting emissions and ensuring data accuracy?

## ➤ Carbon management

- Does the firm actively monitor energy use?
- Are there carbon reduction targets?
- What programmes are in place to ensure operating procedures minimise carbon impact?
- Are there awareness programmes and training for all staff?
- What capital investments have been made and are planned to reduce carbon impact?
- What programmes are in place to reduce lifecycle impacts of products and services?
- Evidence of good practice from site visit?

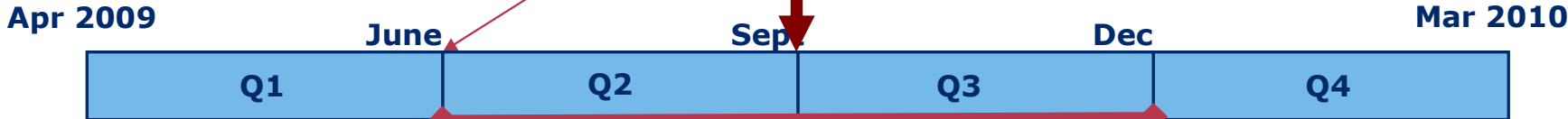
# Achieving the Standard: engagement timeline example



# Planning your assessment timelines



Data available 3 months after EOY



Time available for assessment before data no longer "current"



CRC "Audit" date



# The Carbon Trust Standard: demonstrating ongoing reduction year-on-year



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## **Application Workshop**





# Carbon Trust Standard Offerings

## ➤ **Certification Only**

- Assess your completed application
- Perform site visits

## ➤ **Assisted Certification**

- Project manage the process
- Assist in completion of Assessment forms
- Assess the completed application
- Perform site visits

## ➤ **Certification consultancy**

- Gap Analysis

## Purpose of this session



- Four main objectives of this session:
  - Clarify assessment process
  - Demonstrate application
  - Provide helpful advice
  - Build the confidence to apply

## **This session**

- Overview of assessment process
- The forms
  - Footprint spreadsheet
  - Qualitative assessment
  - Evidence pack
- Hints & Tips
- Q&A

# Introduction to the process

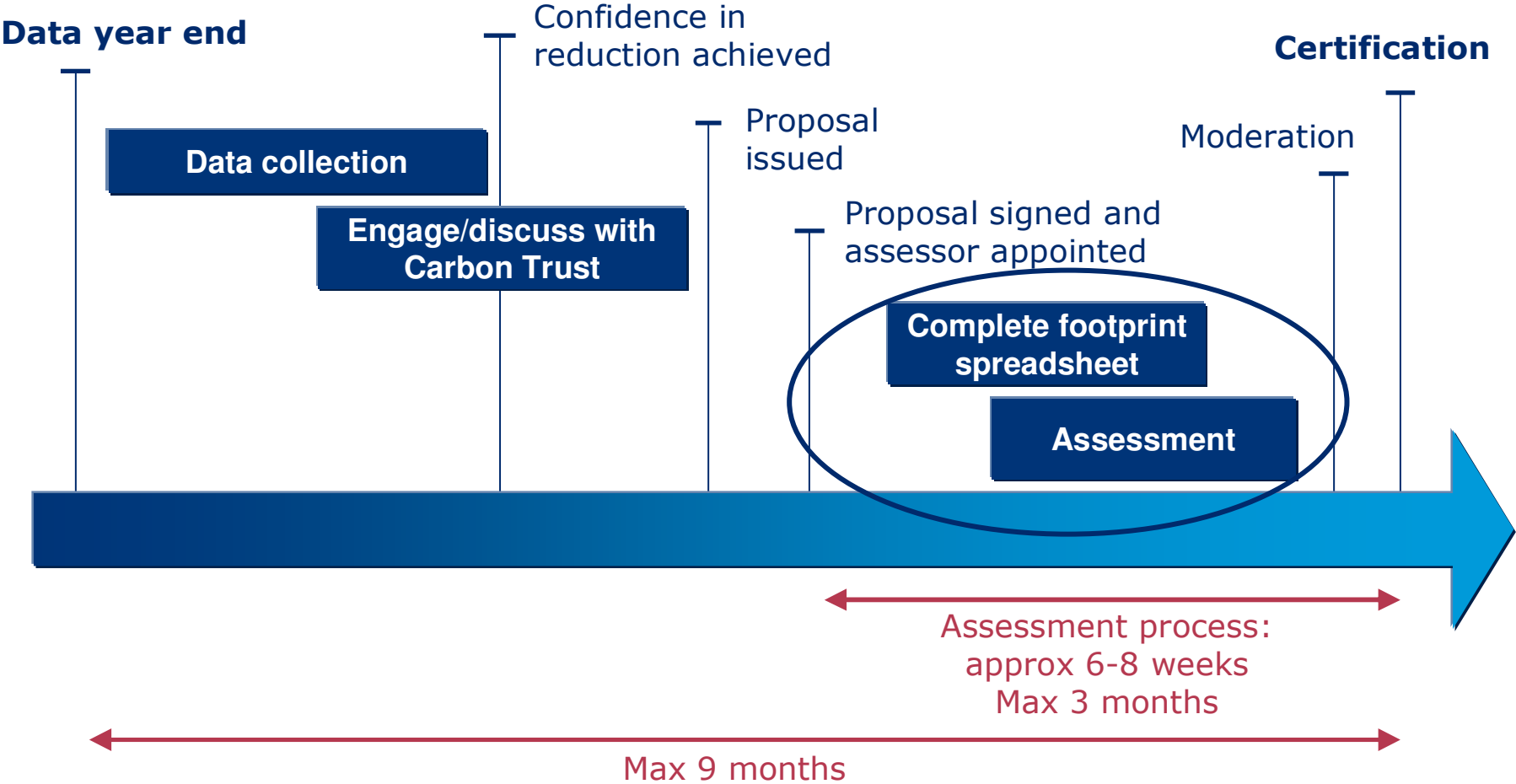


- An application for the Carbon Trust Standard contains :
  - The carbon footprint spreadsheet
  - Assessment form – qualitative questions
  - The evidence pack


- Documents are available on the website

A screenshot of the Carbon Trust Standard website. The header includes the Carbon Trust Standard logo, the title "The Carbon Trust Standard", a "Welcome" message with a "Login" link, and a search bar. A navigation menu contains links for "Home", "About us", "Get certified", "Using the Standard", "Latest news", and "Information centre", with the latter circled in red. A red arrow points from the "Information centre" link to the "Find out more" button in the main content area. The main content area features a banner with the text "Other organisations have achieved the Standard. You can too." and a "Find out more" button. Below the banner are sections for "Welcome to the Carbon Trust Standard", "Recent achievers" (listing O2, Grange, and Manchester Airport), "In focus" (discussing the Carbon Reduction Commitment), and "2009 Standard Bearers Showcase" (welcoming 10 decision makers).

# Overall Process Timeline



## Assessment Activities

- Assisted Certification or Certification Only
  - Initial discussion with your assessor
    - Clarify boundary & understand the organisation
    - Set out the way forward
  - Complete the forms
    - Raise questions and clarifications with your assessor
    - Submit the forms & evidence before on-site audit
  - Undertake on-site audit
    - Audit trail for data, confirm qualitative aspects
    - Ensure availability of key people & infrastructure
    - Receive initial feedback
  - The assessor will finalise forms and submit for moderation
- 



## **This session**

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# Carbon footprint spreadsheet



- Level 1 (pale blue cells) are compulsory:
  - Electricity
  - Gas
  - Other on-site fuel
  - Fuel used in vehicles
  
- Level 2 (pink cells) are optional at initial certification
  
- Any assumptions made should be qualified
  
- Common emissions factors are included in spreadsheet; others should come from govt source if possible i.e. Defra in the UK

	Units	Emission factor (kgCO <sub>2</sub> e / unit)	Year -2 Year end date 31-Dec-06
<b>Direct Emissions (scope 1)</b>			
Stationary sources			
Gas	kWh	0.1850	17,361,465
Oil	kWh	0.2520	3,586,192
Biomass	kWh		
Other (specify)			
Owned transport			
Diesel	litres	2.6304	22,604
Petrol	litres	2.3154	10,066
Other (specify)			
Process / Fugitive (specify source):			
Refrigerant gas - R404a	kg	3260	1,466
<b>Imported power/utilities (scope 2)</b>			
Purchased Grid Electricity	kWh	0.5370	8,925,676
Green Tariff Electricity	kWh	0.5370	

# Carbon footprint spreadsheet



- Basic data you will need:
  - Annual consumption data in kWh for each fuel or energy stream covering each year over the 3 year period
  - 3 years data on benchmark e.g. annual turnover, product output volume etc
  - Owned or leased vehicles annual fuel consumption by type of fuel
  
- Potential extra data requirements:
  - Acquisitions or divestments made during the period (if applicable)
  - Imported power or heat from CHP (if applicable)
  
- Reduction is calculated on a relative and absolute basis

## Carbon footprint spreadsheet

### Instructions

Please fill in the sheets with BLUE TABS. Grey tabs are for information or assessor use only

### Footprint calculation

Enter energy use data on the 'Footprint Calculation' sheet.

Blue cells are 'level 1' emissions. This information is required to achieve the Standard.

Pink cells are 'level 2' emissions. This information is optional for the first certification.

### Reduction

The reduction in footprint over 2 or 3 years is calculated on the 'Reduction' sheet.

Enter turnover and/or benchmark information on this sheet to calculate a relative reduction.

### Data sources

Please enter data sources for audit / verification purposes



## Full spreadsheet

You are using this spreadsheet in a simplified view, which is suitable for 80% of applicants for the Standard.

Organisations with a more complex footprint should click the button below to switch to the full view. This is designed for organisations that:

- import or export power or heat from CHP
- have undergone structural changes that significantly impact the footprint (acquisitions, divestments, outsourcing, insourcing)
- have more emissions sources than will fit in the 'footprint calculation' sheet (e.g. petrol, diesel, LPG and aviation fuel)
- wish to include process, fugitive or other emissions sources
- are SMEs using the 2% project reduction rule

(You need to enable macros for the button to work. If you have any problems using this please contact your account manager)

[Switch to full version](#)

# FOOTPRINT CALCULATION

Complete for level 1 footprint  
 Additional requirements for level 2 footprint  
 Automatic calculation

Organisation name		Assessor name	
Date spreadsheet completed		Assisted certification?	
Data year end date		Level of footprint (1 or 2)	

Footprint level

Units	Emission factor (kgCO <sub>2</sub> e / unit)	Year -2	Year -1	Year 0
		Year end date	Year end date	Year end date

### Direct Emissions (scope 1)

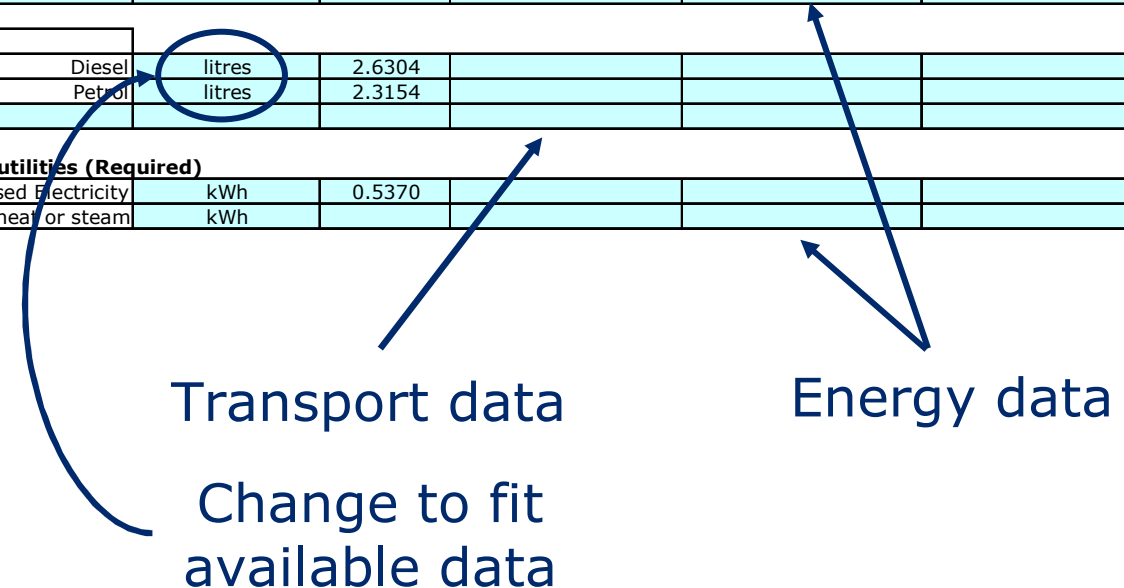
Stationary sources				
1	Gas	kWh	0.1850	
1	Oil	kWh	0.2520	
1	Other (specify)			

Owned transport				
1	Diesel	litres	2.6304	
1	Petrol	litres	2.3154	
1	Other (specify)			

### Imported power/utilities (Required)

1	Purchased Electricity	kWh	0.5370	
1	Imported heat or steam	kWh		

Comments

Use the comments to explain the data

Footprint Calculation



# FOOTPRINT CALCULATION

Complete for level 1 footprint  
 Additional requirements for level 2 footprint  
 Automatic calculation

Organisation name		Assessor name	
Date spreadsheet completed		Assisted certification?	
Data year end date		Level of footprint (1 or 2)	

Footprint level

Units	Emission factor (kgCO <sub>2</sub> e / unit)	Year -2	Year -1	Year 0
		Year end date	Year end date	Year end date

Comments

### Direct Emissions (scope 1)

#### Stationary sources

1	Gas	kWh	0.1850				
1	Oil	kWh	0.2520				
1	Other (specify)						

#### Owned transport

1	Diesel	litres	2.6304				
1	Petrol	litres	2.3154				
1	Other (specify)						

### Imported power/utilities (Required)

1	Purchased Electricity	kWh	0.5370				
1	Imported heat or steam	kWh					

### Other Indirect Emissions (Optional)

#### Business travel

2	Travel by hire car	km	0.1200				
2	Travel by taxi	km	0.2580				
2	Travel by bus	passenger km	0.1073				
2	Travel by rail	passenger km	0.0602				

#### Travel by plane:

##### Long haul:

2	First Class	passenger km	0.3519				
2	Business Class	passenger km	0.2551				
2	Premium Economy	passenger km	0.1407				
2	Economy	passenger km	0.0880				

##### Short haul:

2	Business Class	passenger km	0.1531				
2	Economy	passenger km	0.1021				
2	Domestic:						
2	Average	passenger km	0.1911				



# REDUCTION

Input required  
Automatic calculation

Annual Footprint

Units	Year -2	Year -1	Year 0
	Year end date	Year end date	Year end date

Comments

Notes

## Footprint and benchmarks (unadjusted)

Absolute footprint (after exports)	kgCO <sub>2</sub> e	-	-	-
------------------------------------	---------------------	---	---	---

## Benchmark denominator (specify)

					e.g., FTEs, tonne product, no. of items
Turnover	£mn				

## Footprint relative to benchmarks

Absolute footprint	tCO <sub>2</sub> e	-	-	-
Relative benchmark		-	-	-
Turnover benchmark	tCO <sub>2</sub> e / £mn	-	-	-

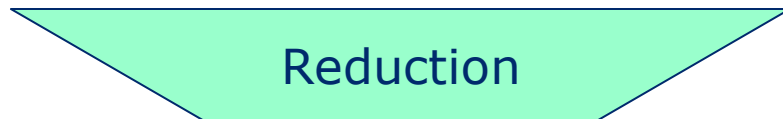
Benchmark data

Reduction calculation	Reduction requirement	Historic data	Base year data	Assessment	Reduction %
Absolute footprint	0.0%	-	-	-	-
Relative benchmark	2.5%	-	-	-	-
Turnover benchmark	2.5%	-	-	-	-

Reduction Measures

Pass / Fail

One 'Pass' Required



## **This session**

- Overview of assessment process
- The forms
  - Footprint spreadsheet
  - Qualitative assessment
  - Evidence pack
- Hints & Tips
- Q&A

# Assessment form



- Qualitative questions to assess the following areas
  - Governance
  - Carbon accounting
  - Carbon management
  
- Filled in by the applicant and assessed by assessor
  
- All questions should be supported by evidence
  
- Pass mark is 60% (48 / 80)


<b>The Carbon Trust Standard</b>			
<b>ASSESSMENT FORM</b>			
<b>APPLICANT INFORMATION</b>			
Company name:			
Applicant type:		<input type="checkbox"/> Organisation <input type="checkbox"/> Subsidiary/Part organisation <input type="checkbox"/> Site	
Estimated annual energy spend:		<b>Segments</b> <i>Very Large: Annual energy spend &gt;£5m</i> <i>Large: Annual energy spend &gt;£500k or over CRC threshold, but below £5m</i> <i>Medium: Annual energy spend £50k to £500k</i> <i>Small: Annual energy spend below £50k</i>	
Segment:			
Period of assessment: <i>(dd/mm/yy to dd/mm/yy)</i>		<i>Refers to the period over which historic emission data is provided:</i> <i>For very large/large organizations, 3 year historic period</i> <i>For medium organizations, 2 year historic period</i> <i>For small organizations, 1 or 2 year historic period</i>	
Industry classification:			
<b>Private Sector</b>		<input type="checkbox"/> Transport & Infrastructure	
<input type="checkbox"/> Utilities and waste		<input type="checkbox"/> Construction & Property	
<input type="checkbox"/> Industrials and manufacturing		<input type="checkbox"/> Hospitality & Leisure	
<input type="checkbox"/> Manufacture of Basic Materials		<input type="checkbox"/> Healthcare & Pharmaceuticals	
<input type="checkbox"/> Chemicals		<b>Public Sector</b>	
<input type="checkbox"/> Household & Consumer Goods		<input type="checkbox"/> Armed Forces and Emergency Services	
<input type="checkbox"/> Food Production & Agriculture		<input type="checkbox"/> Central Government Departments	
<input type="checkbox"/> Beverages, Brewing & Tobacco		<input type="checkbox"/> Education	
<input type="checkbox"/> Retail & Distribution		<input type="checkbox"/> Executive Agencies	
<input type="checkbox"/> Financial Services		<input type="checkbox"/> Local and Municipal Government	
<input type="checkbox"/> Hi-Tech & Professional Services		<input type="checkbox"/> NHS Trust	
<input type="checkbox"/> Telecoms & Media		<input type="checkbox"/> Other Public Buildings	
Contact:		Position:	
Address:			



## Qualitative Criteria

- Section I: Governance
  - 1. Policy** – does the organisation have a policy on carbon?
  - 2. Responsibility** – who is responsible for managing carbon?
  - 3. Reporting & Communications** – what internal / external, formal / informal communication on carbon exists?
  
- Section II: Accounting
  - 4. Accounting Process** – how is carbon accounting delivered and managed?

## Qualitative Criteria (cont.)

- Section III: Carbon Management
    - 5. Monitoring** – what ongoing management of emissions is undertaken?
    - 6. Targets** – what targets exist? Are they appropriate and linked to policy and carbon management plans?
    - 7. Reduction Programmes** – what are the planned activities that have / will deliver emissions reductions?
    - 8. Investments** – what are the investments that have been made that have delivered carbon reductions?
    - 9. Training** – what training and awareness activities are delivered to staff?
    - 10. Products & Services** – how is the organisation influencing the wider community (eg customers & suppliers)?
- 

# Example question: Governance



**1. Policy:** Does your organisation have a low-carbon/energy policy?

- Social responsibility programme (attached as evidence) sets goals to reduce carbon emissions
- Action plans are set and performance indicators reviewed annually

Assessor comments:

- Recognise their environmental impact both operationally and through their products
- Environmental issues integrated in day to day running of business
- Long term social responsibility objectives include aim of zero carbon

Mark:  
5 / 5

# Example question: Carbon Accounting



**4. Accounting process:** Are there procedures for preparing, quality checking and documenting an accurate carbon footprint?

- Energy consumption data collected monthly
- Reported monthly via a web portal
- External review of sustainability report

Assessor comments:

- Energy figures for customer are based on bills. Metered energy figures would be more accurate
- Fleet emissions are based on expenses and estimated price. Litres of fuel bought should be recorded

Mark:  
7 / 10

# Example question: Carbon Management



**9. Training:** Are there awareness programmes for all staff and appropriate training for those with responsibility for carbon emissions?

- New staff training soon to include carbon management
- Staff engagement activities relating to transport are planned

Assessor comments:

- Room to improve on current practice
- Interest in environmental issues at management level but no staff awareness training
- No mention of issues in employee handbook
- Courses should be identified for staff involved in energy management

Mark:  
1 / 5

# Evidence Pack

- Electronic documents only
- Keep it focussed (20 pages)
- Make more available for the assessor to review



## Hints & Tips

- Data:
  - Make all assumptions & calculations clear
  - Document sources and ensure they are available for audit
  
- Qualitative Criteria:
  - Overlaps but distinct criteria, each must be addressed
  - Use the assessment criteria to focus answers & evidence
  - Make sure key people are available for audit
  
- Get value from the process, assessor feedback
  
- Use, but don't abuse, your assessor!



# Agenda

**09.30 – 10.00 Registration**

**10.00 – 10.10 Introductions – Brendan Reid, Carbon Trust**

**10.10 – 10.35 CTS benefits & methodology – Adam Leaver**

**10.35 – 11.00 Case Study: David Stutchfield, University of St Andrews**

**11.00 – 11.20 Coffee Break (20 mins)**

**11.20 – 12.20 CTS assessment walk-through - Adam Leaver**

**12.20 – 12.45 Case Study: David Currie, Scottish Court Service**

**12.45 – 13.00 Closing remarks – Brendan Reid**

**13.00 – 14.00 Lunch and Networking**





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# Contact details and more information



- **Website:** [www.carbontruststandard.com](http://www.carbontruststandard.com)
  - Case studies
  - Rules and tools
  - Enquiry form
  - News + updates
  
- **Helpline:** **0800 019 1443**
  
- **Dedicated account management team**





**Recognition for real carbon reduction**

