



Get Social

The Social Business Roadshow

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Hosted By:





Zucker für den Klimaschutz

SugarCRM im Einsatz bei South Pole Carbon Asset Management AG

**Patrick Biber
IT Manager / System Administrator**



- About Our Business
- Why SugarCRM?
- Working With Our Sugar Partners
- SugarCRM Implementation
- Business Benefits
- Best Practice



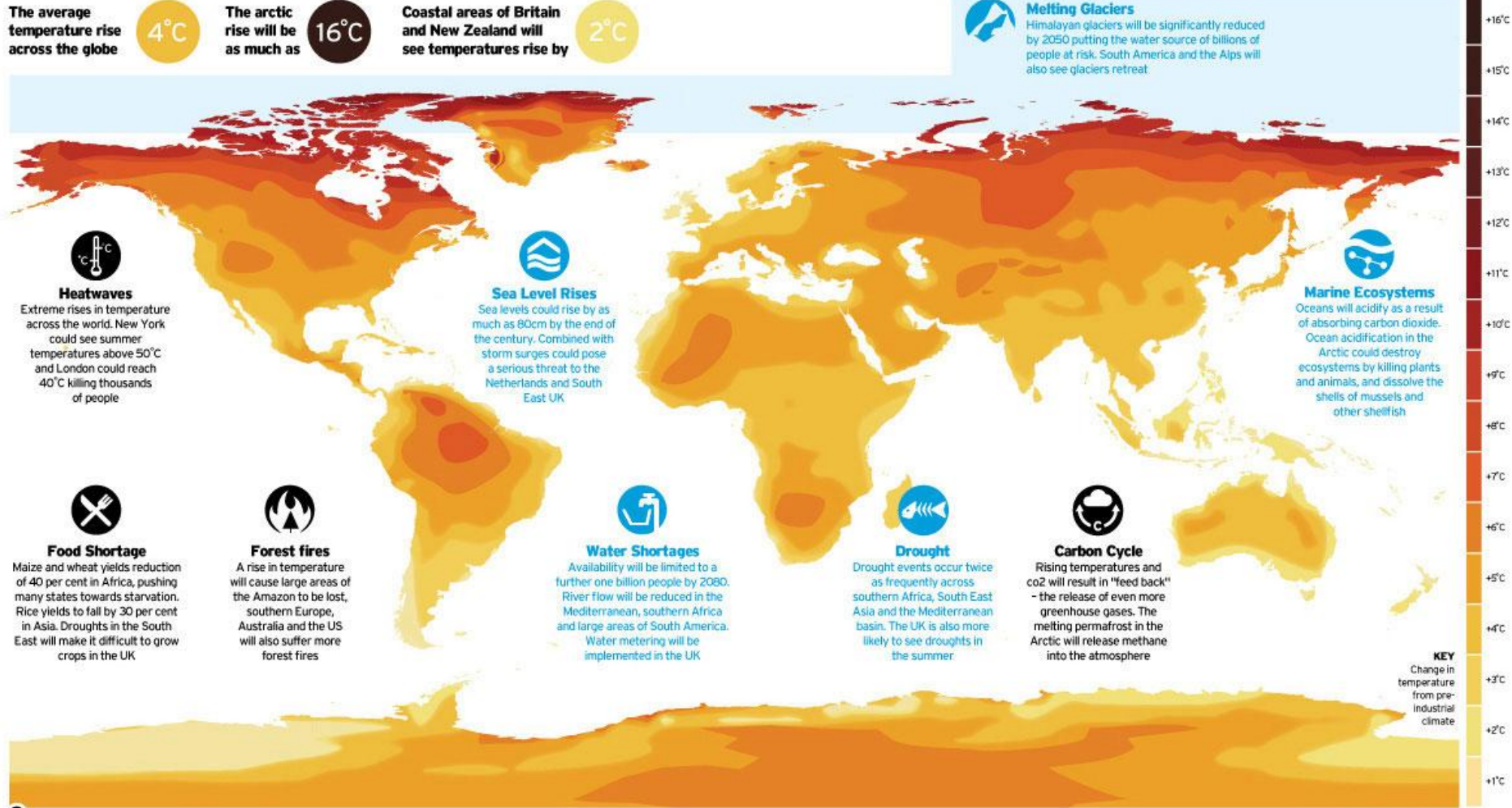
Overview of the carbon business

- Overview of South Pole Carbon
- Services
- References

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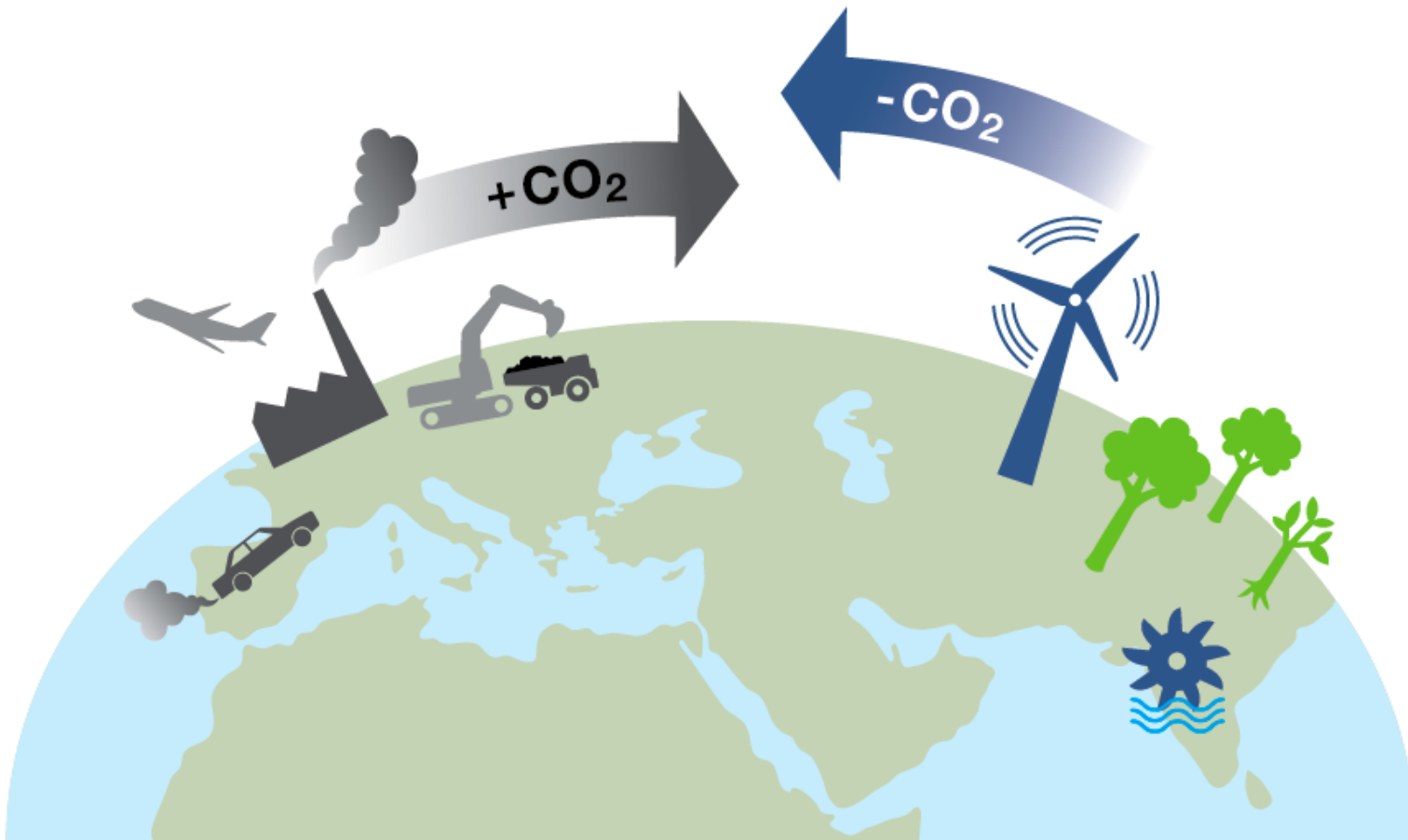


Our challenge – climate change





Our business model: carbon trade





Example of an emission reduction project



Project type:

Standard:

**Annual CO₂
emission reduction:**

Additional benefits:



VCS | VERIFIED
CARBON
STANDARD
A Global Benchmark for Carbon

CCB StandardsSM
The Climate, Community & Biodiversity Alliance

Reforestation with about 20 native tree species

43,000 tCO₂e

- New habitats for endangered species
- Local job opportunities as an alternative to illegal mining and coca plantations
- New, ecologically sensitive methods to battle mosquitos
- Study program for the Universidad de Medellin (CO) and Georg-August-Universität Göttingen (DE).



South Pole – developing solutions worldwide

Best Project Developer
Environmental Finance's
2011 Voluntary Carbon Markets Survey

- Head office
- Satellite office
- Local presence



- 2006: Incorporation in Zurich / Switzerland
- 2011: ten offices worldwide
- 2011: Best Project Developer*
- Over 80 carbon pros from 22 countries
- Projects in 21 countries
- Specialized in high-quality “Gold Standard”
- Developing both voluntary and compliance credits

* Environmental Finance:
Voluntary Carbon Market Survey 2011



Zurich – European carbon capital

Zurich and Switzerland offer perfect conditions for demanding carbon players



- **Swiss Institute of Technology (ETH) in Zurich:** excellent climate scientific background
- **Zurich is leading in carbon research and project development** and is the world's 2nd important carbon trading hub after London
- **Zurich's financial infrastructure:** perfect conditions for a global market of €100bn
- **The Gold Standard** – the industry's leading standard – is based in Geneva
- **The world's first national emissions trading registry** opened in 2007 – in Switzerland
- **Zurich Carbon Markets Association** founded in 2010 – with South Pole as founding member and about twenty institutions and companies on board
- **The world's first scheme to offset carbon emissions from flights** was developed by ETH students who then formed myclimate – and later founded South Pole

ETH

Eidgenössische Technische Hochschule Zürich
Swiss Federal Institute of Technology Zurich





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- Overview of the carbon business
 - Overview of South Pole



Services

- References
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South Pole provides the whole range of carbon asset management solutions



Carbon Asset Development: We develop emission reduction projects together with technology partners



Project Development



- **Carbon Asset Management Services** that guide your projects through the whole carbon project cycle and ensure timely issuance of carbon credits
- **Gold Standard** certification whenever possible
- **Carbon financing solutions** tailored to your needs, including:
 - Upfront payments to reduce investment costs
 - Forward sales at a fixed carbon price
 - Equity investment in carbon credit projects
- **Integrated technological solutions** together with our technology partners
- **Sales of existing credits** through our network of carbon credit buyers

Sales of emission reductions: We identify and contract premium emission reductions for large buyers



Sales

- **Drafting and reviewing** of sourcing strategies
- **Identification of suitable projects** for your requirements from our rich high quality portfolio and through South Pole's network
- **Thorough due diligence** (technical, sustainability, reputational, ...)
- **Ensuring rapid and smooth credit delivery** through:
 - Facilitation of Emission Reduction Purchase Agreement (ERPA) negotiations
 - Management of carbon credit certification
- **Unique access to highest quality** Gold Standard Certificates

Cutting edge consulting services: We provide distinctive advisory services on carbon markets



Consulting

- **Carbon Footprinting Services**
(according to GHG Protocol und Carbon Disclosure Project)
- **Carbon Reduction Strategies Advisory**
- **Development of business concepts** for Climate Neutrality
- **Assessment of carbon potential**, including for the voluntary markets
- **Due diligence services** for carbon credit buyers
- **Drafting and reviewing** of carbon credit commercialisation strategies taking into account anticipated market developments
- **Identification of Gold Standard potential**
- **Methodology development**

Carbon IT solutions: tailor made tools for your carbon projects



Carbon IT

Web Based Project Management Tool

- PMT developed by South Pole for project milestones management, issuance logistics, timekeeping, expenses reporting, and information sharing
- The flow of information in the PMT is based on an RACI diagram developed by South Pole which in turn is based on extensive experience in managing carbon projects.
- The South Pole PMT currently holds information on ca. 900 emission reduction projects, consultancies, and sales projects, accessible for over 80 users

Home Search Projects Vintages Sales Consult Time Expenses Services Users Preferences mhirsbrunner (admin) Logout

Projects - Search Result

advanced search search projects

Emission Reduction Projects switch to vintages overview always show: timeline

Search Criteria search

Projects Overview - 9 Projects

Note that by default only contracted projects are shown. Use the advanced search option to view all projects. You can sort projects by clicking on the arrows. Use shift key for multiple sorting parameters. See all information of a project by clicking on its name, mark a project by clicking on its number. Dark turquoise vintages have not been quality checked.

Project No	Name	Region	Type	Scope	tCO2e12	tCO2e	Last Milestone	SV	PM
300011	MPPL 4.5 MW	India	CDM	Renewable sources	157451	193087	ERPA	ca	st
300012	MPPL 16 MW Shri Chamundi	India	CDM	Renewable sources	228702	743372	ERPA	ca	st
300020	Raus Power 3.6 MW poultry litter	India	CDM	Waste handling and	137000	290000	Service Contract	ca	ksa
300025	Dulmenhe Hydropower	China	CDM	Hydropower	295520	544308	Contract Verific	ca	ld
300059	CYT WWT	Thailand	CDM	Waste handling and	245000	743192	Monitoring	pt	hs
300084	Bangna WWT	Thailand	CDM	Waste handling and	158849	988000	Registration	pt	sr
300096	Lutong Hydropower	China	CDM	Hydropower	189535	305573	Contract Verific	ca	ld
300112	Mexcol Distillery WWT	Latin America	CDM	Waste handling and	32454	85388	Validation	acd	pt
300386	Amayo 40 MW Wind	Latin America	CDM	Wind power	522205	901517	Exclusivity and	acd	cd

CDM Project add project acquisition lead add selected to bookmarks

Acquisition leads can later be changed into contracted projects by the regional manager or higher.

Milestones Overview

always hide

Charts

always hide

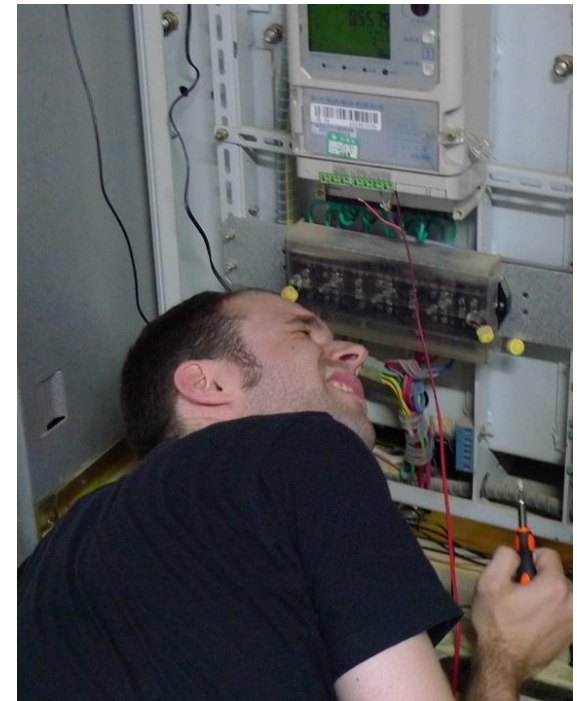
Carbon IT solutions: preparing our projects for the next generation



Carbon IT

MOVERS

- IT tools to support and automate monitoring, reporting and verification for projects and carbon inventories
- cost efficient, accurate data directly from the source
- independent, traceable and standardized data collection
- possibility to link purchased offsets to actual data from the specific project
- another step in South Pole's approach to strengthen carbon offset transparency



installation of MOVERS at a Chinese hydro project



South Pole Carbon's carbon webshop



Carbon IT

- **Developed in-house** to fully reflect our demands and high standards
- **Footprint calculations based on widely shared assumptions** from trustworthy sources
- **Transparent, actual projects** with third-party verified, issued credits only
- **New projects added on a regular basis** to offer our clients the offsetting of their choice
- **Transparent calculation** with individual footprinting report, certificate and traceable retirement in official registry

[Sign in](#) | [Register](#) | [FAQ](#)

[Deutsch](#) [Français](#) [简体中文](#) [繁體中文](#)

Offset Your Carbon Footprint Now

[Why offset with us?](#)

Start by selecting a category:



Flights



Mobility



Energy



Freight



Calculation
Offset
Payment
Certificate



Events



Waste



Overnight



Tons CO₂



Cart

Welcome to our Carbon Footprint Calculator and Offset Shop

Please start by choosing a category above, and experience real carbon neutrality you can trust.

Offset your carbon footprint with transparent, real emission reductions fitting your needs and preferences:

- Choose from several high quality offsetting projects (instead of opaque portfolios).
- Achieve real climate neutrality now with our already verified credits (instead of a promise for future investments).
- Get a maximum emission reduction per invested capital (instead of paying high intermediary and marketing cost).
- Receive your detailed footprinting report at no extra cost (instead of just guessing how your footprint has been calculated).

South Pole offers proprietary high quality projects only, developed against the strictest international standards, e.g. The Gold Standard, VCS, CCBS. South Pole was elected Best Project Developer in Environmental Finance's Voluntary Carbon Markets survey 2011

Check the detailed facts provided with the specific projects! In addition, and at no extra cost, you get a footprinting report based on your data. You can see an example certificate and an example footprinting report by clicking on the icons:



[Certificate](#)



[Report](#)

Your information is processed using the latest security technologies, and will not be transferred to third parties (check our [Terms and Conditions](#) for details).



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References

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South Pole Carbon's references: extensive network of high quality buyers



Unparalleled carbon market expertise

- Participation in the UNFCCC Methodology Panel
- Involved in major climate change negotiations since 1997
- Carbon advisory to international organizations (World Bank, European Commission, World Economic Forum, GTZ, Africa Progress Panel, World Food Programme, ...) and to registered CDM projects with a volume of 100 million tCO₂e until 2012

Extensive client network

- Top-rated compliance buyers
such as the Austrian Government, Swiss Government, Climate Cent Foundation (Switzerland), Italcementi Group, LUSO Carbon Fund (Portugal), EGL, ...




Italcementi Group



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra



Stiftung Klimarappen
Fondation Centime Climatique
Fondazione Centesimo per il Clima
Climate Cent Foundation

- Well-known voluntary buyers
such as BP, Unilever, Axpo, Swiss Re, WWF, Austrian Post, Eneco Energy, RBC, Greenpeace, Ben & Jerry's, Transoflex, ...) 



Point Carbon™

bp





Why SugarCRM

- We need a product that is **able to grow** with us; we are using the *Community Edition*, the upgrade to the *Enterprise Edition* is in evaluation.
- We want to **own our data** and have **full control** over it.
- The database has to be **accessible** from other application.
- It has to run on our **LAMP-Server environment**.
- We want to be able to **understand the technology** behind.
- **Active Community on Sugarforge: More than 10 million downloads**
 - **Developers: 30,430** – in the forum you can find **6,100 entries** for the **German Language Pack** alone.
- We are **able to change the Partner and the Hosting**, we could even change the CRM, because **all the data is stored in our MySQL DB**.
- With the Sugar Designer, we can make **quick changes** on the Web Interface without leaving the update path.



Working with our Sugar Partner

- SugarCRM is hosted in Basel on a SyGroup server, they **take care 24/7**.
- CS2 gave us a **very good training** to understand how we can use SugarCRM to satisfy our needs.
- CS2 was also able **answer our technical questions** about the email integration.

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Our Sugar CRM Implementation

- Our **Sales** team in Zurich, Beijing and Bangkok **track all direct communications** with large clients (email, meetings, calls) with *Sugar*.
- Our **Marketing** team uses *SugarCRM* as **mass mailer** for internal and external newsletters, our **website's visitors** can subscribe directly into *Sugar*.
- Our **Management and local Directors** use *Sugar* to get to **know our clients** and to see with which **departments and persons** of a company we already did business.

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Business Benefits

- We do **know** our clients
 - We can **follow up** with our clients
 - We can **get in touch** with clients and potential clients via easily personalized newsletters
 - We can run **specific campaigns** modeled after certain profiles by email and phone
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- *Sugar CRM* is our **Sales and Marketing tool**



Best Practice/Advice for others

- If you do your own installation, you should have a **stable hosting with root access** such as a VPS or your own server
- You should be able to **configure the server according to your needs** – or you need a helping hand
- Take care of **backup** including the DB backup, a **direct communication channel with the hoster and service provider** help a lot.
- **Be careful when installing third party applications on Sugar**
- Don't change elements on the web interface too easily, **it's easy and nice to edit it** with the *Sugar Designer* in the admin panel
- **Involve the users:** it's their tool for their success

Thank you!



For more information on South Pole Carbon Asset Management Ltd., go to:

<http://southpolecarbon.com>

To calculate and offset your carbon footprint, go to:

<https://shop.southpolecarbon.com>

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