



The Carlyle Group - Simplified UK Carbon Tax Compliance

The Carlyle Group, founded in 1987, is one of the largest global asset managers with over \$203 billion in funds under management. The company invests in some of the world's leading companies that drive growth through innovation and efficiency. Carlyle demands the same top leadership of itself, leading its peers in developing sustainability initiatives and taking environmental issues very seriously to ensure compliance and drive top performance.

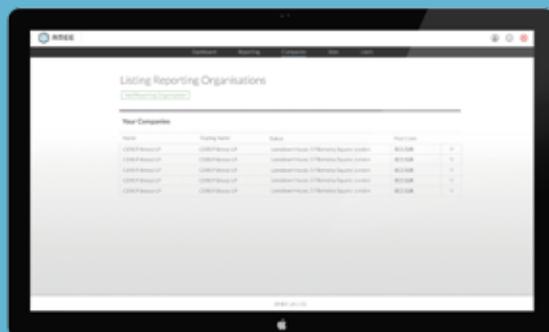
The Challenge

The Carlyle Group is subject to the UK's CRC Energy Efficiency Scheme regulation given its large portfolio of investments based in the UK with some companies exceeding the threshold energy consumption of 6,000 mWh. As a result Carlyle must collect energy consumption data from thousands of sites across its portfolio, calculate carbon emissions, pay a tax currently set at £16 per tonne of carbon, and maintain all supporting documentation readily accessible for audit purposes. The key challenge for Carlyle was to manage this process in an efficient and accurate manner for its team and portfolio companies.



The Solution

AMEE delivered its CRC management application that provides an efficient and intuitive way for companies to report energy data across multiple sites and then aggregate that data at the company and fund level for reporting. We identify key employees in each company who will report data and then provide access to the application and ongoing support. Once data has been submitted Carlyle can generate automated reports for each company and at the fund level providing all required compliance information while storing data in an easily accessible format online.



Listing Reporting Organisations				
The Company				
Name	Reporting Name	Role	Reporting	
AMEE Group LP	AMEE Group LP	Headquarters - Marketing Support Center	60,000	✓
AMEE Group LP	AMEE Group LP	Headquarters - Marketing Support Center	60,000	✓
AMEE Group LP	AMEE Group LP	Headquarters - Marketing Support Center	60,000	✓
AMEE Group LP	AMEE Group LP	Headquarters - Marketing Support Center	60,000	✓

Key Benefits

Overall AMEE has enabled Carlyle to reduce the time spent on CRC compliance while providing accurate reporting and a robust application to maintain data for audit purposes. Key benefits include:

- Reduce cost and time of collecting and reporting data to help Carlyle's team focus on their core work.
- Reduced compliance burden for portfolio companies with simplified data entry and reporting.
- Readily accessible data and reports to reduce audit preparation and risks of non-compliance.
- Robust energy and carbon calculation to help minimize tax and ensure accurate compliance.

"AMEE helped us comply with our CRC reporting and allowance purchasing obligations much more efficiently, saving us significant money, time and manpower in report preparation. The application is very easy to use, provides invaluable monitoring information and ensures a greater level of data accuracy, enabling us to report with confidence."

Louise Dumican, Legal Counsel



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