

25 February 2004



Mr Adam Bisits
NEM Advocacy Panel
12 Marshall Avenue
Kew VIC 3101

Dear Adam,

Re: DM Roadmap Workshop – Stage 1 Report

It is with pleasure that we enclose the report covering Stage 1 of the preparation for DM Roadmap Workshops.

This report was the result of a significant level of input from the steering committee and other interested individuals and represents what we believe to be a well-considered and practical advance in preparing for the execution of a DM Roadmap.

As can be seen from the enclosed time records, the actual hours expended by the participants in completing Stage 1 were almost three times that which had been estimated at the outset of this project. In fact, as the steering committee's time spent in reviewing and commenting documentation has not been recorded, it is probable that over three times the estimated hours were in fact applied to the task.

This not only means that the "in kind" contribution required under the terms of the agreement has been well and truly met, but also reflects the level of interest and dedication to achieving a positive outcome that was demonstrated by the participants.

The extra time and effort that was expended also reflects the increased scope of the DM Roadmap workshops that was decided upon. When the initial application for funding was conceived, it was thought that a relatively exclusive list of participants in one or two workshops might be sufficient to achieve an effective roadmap. However, as work progressed, it became clear that a far more inclusive series of workshops and participants was needed to achieve the objective. This result concludes that a series of 4 or 5 workshops is required across the major NEM capital cities.

While this enlarged scope is also accompanied by an increase in the costs to execute the workshops, it is the view of the steering committee that this level of participation is what is required to achieve a Roadmap that has sufficient weight to effectively contribute input to the policy debate.

DPPL is presently engaged in preparing applications for the execution of the DM Roadmap Workshops on behalf of the steering committee and we plan to lodge these in time for consideration at the next NEM AP meeting.

Yours Sincerely,

Franz Grasser
Director

25 February 2004



AP Demand Management Roadmap Workshops

Deliverables for Stage 1 of the Project

The deliverables as stated in the funding agreement are:

- Delivery of a workshop agenda;
- Materials for a workshop;
- A list of intended participants or invitees to the workshop;

All as envisaged in the application.

The funding agreement also requires us to consult with Moreland Energy Foundation (MEFL) in relation to this work.

It also requires DPPL to keep records of progress in the project including in-kind contributions for the purpose of informing the panel and to support the invoice on completion of Stage 1.

At the kick off meeting on January 12, it was agreed that DPPL will provide the secretariat for the effort and that EUAA and BCSE will provide “in kind” contributions in the form of input into the steering committee.

It was also agreed that a steering committee be set up to guide the process with DPPL acting as the secretariat to actually execute the tasks involved.

The steering committee is initially composed of:

- Roman Domanski – EUAA
- Ric Brazzale – BCSE
- John Dick – EAG
- Esther Abram – MEFL
- Julian Turecek – Origin Energy

1. Workshop Agenda

After reviewing the steering committee's inputs into the list of intended participants, it has become clear that at least 4 and perhaps 5 workshops will be required to achieve the desired stakeholder and geographical coverage. The workshops are expected to be held in Adelaide, Brisbane, Melbourne and Sydney with the option of a fifth workshop in either Melbourne or Canberra, depending on acceptances and the final balance between locations.

Consideration was given to running these concurrently at different locations with video hook ups for Plenary sessions, but it was concluded that this would introduce a number of risks and possible complications that could undermine the effectiveness of the workshops.

Consequently, it was decided that the 4 workshops would best be run serially across the different locations over say a 2 week period. This will enable lessons to be learned and applied to subsequent workshops and seems more likely to produce a quality output.

While the list of intended participants (Attachment A) requires fine-tuning to achieve these objectives, it is clear that this can be readily executed once funding to proceed with the workshops has been established.

The timeline that has been established for the DM Roadmap process requires that the output of the workshops be available to inform the policy development by MCE. This means that the workshops should preferably be executed in March 2004 to be able to be considered for the April meeting of the MCE. Although in practice this is unlikely to be achieved, if the project is commenced in March, the Roadmap could be available to inform the policy debate by late April or early May 2004.

The Steering committee decided that the workshop processes should be further developed with input from an expert group who have relevant industry knowledge and process experience in dealing with the subject matter of the workshops. This is a highly desirable step given the importance of presenting well-prepared (but not closed or conclusive) material to the workshops. Workshop participants will need to be guided but not steered.

The list of individuals that were identified in this category is:

Alan Pears
Ross Fraser
Jeff Washusen
Ric Brazzale
Terry Jones – CSIRO
Retailer
NSP

A trial run of the workshop processes by these individuals together with the facilitator is considered necessary to ensure the proposed process can deliver the desired outcomes prior to actually commencing the workshops.

The present concept is that the workshops will extend over a full working day, but the scope of the present workshop content may be difficult to complete in this period. This is another key reason that it is considered necessary to conduct the workshop trial.

A draft agenda for each of the workshops has been prepared as Attachment E. It should be noted that this agenda is subject to review and adjustment pending the results of the trial workshop that will be required to establish the veracity and effectiveness of the proposed workshop tools.

The steering committee decided that the positive effect of an independent facilitator was well worth the cost and that the workshops should be run using a professional facilitator.

Such a facilitator will provide the necessary independence in recording workshop outputs, in presenting the sessions as a genuine and open ‘search for knowledge/information/ideas’ and in so doing will increase the participant’s confidence that the workshop is not being skewed or hijacked by sectional interests. It will also provide the benefit that all participants can speak and contribute without fear or favour.

In addition, a professional facilitator will be skilled at keeping the workshop on task and this is likely to be very important, as the scope of the task is likely to be at the limits of what can be achieved in a one-day workshop.

A number of potential candidates for this role were identified and these will be investigated in more detail to establish costing for the funding phase.

2. Workshop materials

A key ingredient required for the success of the DM Roadmap Workshop is the preparation of the workshop materials.

A document that details the objectives, definitions, scope, resources and participants in the workshop needs to be circulated to each of the invitees well ahead (at least 2 weeks) of the actual workshop itself to allow individuals to prepare.

While this documentation will necessarily prescribe the overall workshop process and the participants, it will not prescribe the detail of the subjects to be workshopped and neither will it try to pre-empt any specific outcomes. Instead the documentation will provide a framework to keep the discussion ‘on task’ and to encourage participation and positive contribution from the participants.

This will include a list of issues and discussion points to provide direction and structure in the form of a matrix of these issues in order to provide the basic framework for the workshop.

Comparison Matrix including Activities, Issues and Actions

The Comparison Matrix (Attachment B) provides the list of DM activities and will invite the participants to add or delete activities for consideration at the workshop. Compiling this catalogue of past, present or possible future DM activities will need input from participants to ensure that there are no significant DM activities overlooked, but as already mentioned, these

will be presented to the participants for consideration in the workshop process without prescribing any specific priority or desired outcome.

It is for the workshop to decide which are the most attractive DM activities and those actions required to implement them. For this purpose, an individual Directional Policy Matrix will be prepared and workshopped for each of the DM activities selected for evaluation.

Directional Policy Matrix

The directional policy matrix (Attachment C) has been derived from a typical marketing analysis tool but has been adapted to evaluate the specific issues that arise in attempting to prioritise DM activities.

The steering committee decided that the most important criteria to be evaluated using this tool is the potential to deliver MW of DM and the \$ benefit that can be derived for each MW delivered. The workshop participants will be required to complete a Directional Policy Matrix for each of the DM Activities selected and listed in the Comparison Matrix.

The results of each of the Directional Policy Matrices will in turn be summarised in the Comparison Matrix to allow a final comparison of priorities and actions to be made.

The other issue that needs to be taken into account in these matrices is the time dimension. It was agreed that these should be based on the ESAA projections for new investment in the ES that are in the public domain. These projections, which have been widely publicised, talk about the need for \$30 billion in new investments by 2012 to meet demand growth.

A short and longer-term target of 2007 and 2020 were also selected as points of analysis for the workshop process. It was suggested that the use of different colours or shading be used to avoid the need for a multiplicity of individual Directional Policy Matrices.

The Workshop Process

The workshop will be designed to work through the matrices above in such a way as to determine importance, identify impediments and assign enabling actions that could achieve successful implementation of specific DM activities. This outcome will provide the basic component required for the preparation of the road map. In addition, this output will form the basis of specific actions that will be required to take the next steps in the implementation of DM.

After the trial workshop has been completed, the final workshop documentation can be completed and a presentation developed that explains this process and desired outcomes as an introduction to participants.

The present thinking is that each workshop will be an all day event, but this will need to be reviewed once the scope of the workshops' task is more fully developed and the number of workshops finalised. While the workshop is all about remaining on task and producing a

useful and tangible outcome, it is well established that such events can benefit from the more informal exchange of ideas that is associated with smaller groups in less formal surroundings.

Perhaps some informal breaks can be introduced into the proceedings or another option might be to break down into smaller groups doing more detailed work on specific DM activities before returning with findings to the plenary. This will need to be established once participant numbers become firm and after the trial workshop has been completed. It should be noted that this approach has the potential disadvantage that different groups might not apply criteria and weightings equally and this could lead to uneven results from the Directional Policy Matrix.

The overall objectives of the workshop are:

- To provide a roadmap that serves as guidance and the focal point for enhanced demand side efforts in the NEM for the ultimate benefit of energy users.
- To bring together a representative group of industry stakeholders who collectively have the knowledge, skills and motivation to help create a roadmap that drives the successful implementation of demand management into the future as an economically and technically viable alternative to supply side investments.
- Achieve buy-in to the results of the workshop to ensure that the roadmap becomes the focal point of future DM activities of the various participants, jurisdictions and stakeholders.
- Use the roadmap as the basis for an action plan to secure funding and any other contributions required to actually implement targeted activities to ensure that real benefits are achieved.
- It is important to note that it is not the objective of this workshop to re-invent the wheel. Rather, the objective is to seek out those activities where immediate gains can be secured by putting some focus and substance into the effort.
It is very apparent that there are a large array of DM options and issues that need to be drawn together into a coherent future strategy that the roadmap will provide.
- This process is timely as there are heavy investments being foreshadowed across the NEM and DM options need to be fully considered in the new policies being developed in the energy sector by the COAG and MCE processes. One way or another, these investments will be paid for by end users and DM options may offer more economic options to traditional supply-side solutions.

Definition of Demand Management

For the purpose of the workshop, it has been decided to adopt the definition that was used in IPART's *"Inquiry into the role of demand management and other options in the provision of energy services"* of October 2002.

This definition is as follows:

'Demand management' may be defined in terms of three attributes: who does it; with what effect and for what purpose. The tribunal has consciously chosen a broad definition consistent

with the terms of reference for the inquiry. In this report the tribunal uses the term 'demand management' to cover actions:

- *taken by generators, networks, retailers, other energy service intermediaries and end users, either separately or in partnership*
- *to alter the level or pattern of consumption of energy, or use of the distribution network*
- *in response to the costs of the supply of energy or environmental preferences or policies.*

This definition recognises the overlaps and interrelationships between various DM technologies and options, the potential parties involved, and the various purposes of DM – all of which make a simple definition inappropriate.

Studies & Reports

A list of significant DM studies and reports has been compiled (Attachment D) and will be issued to the participants for their reference and preparation. These bodies of work illustrate that there has been a significant effort applied over a number of years to find ways to implement DM and the contents of these are an important source of the information required to complete the matrices in the workshop processes.

However, nowhere has all this work and what it means in practice been consolidated into a coherent strategy for DM. The DM road map is intended to commence this task.

One of the ways in which this will be achieved is that those involved in the preparation of these studies and reports will be invited participants in the workshops. This should enable the content of these bodies of work to be directly accessed during the workshops without the need for each individual to be “full bottle” across each of the areas.

This body of work also illustrates the key issue that the DM Roadmap is attempting to illuminate:

With billions of \$ of economic potential, (ref ESAA) and with all of the work that's gone into the studies and reports in Attachment D, why have DM measures delivered so little?

If the workshop process can produce a roadmap that provides the answers to this question, it will have been time and money well spent.

Completion of the DM Roadmap

After the Workshops are completed and the results collated, it will become apparent whether there are any significant differences in the outputs of each of the workshop groups. Any such differences then need to be illuminated and communicated back to the participants as a precursor to the finalisation of the DM Roadmap.

While it is impossible to predict how many differences emerge from the workshops and how difficult these may be to resolve, we have to be realistic and allow for a process to complete this last step.

The preferred method is to use advanced video link tools to allow a hook up between the workshop participants that will also produce the final agreed DM Roadmap on line.

It is envisaged that this link up might take around 3 hours, but it could also be more or less depending on the number of issues, their significance and the depth of feeling of the participants. This is another area where the skill of the facilitator will be instrumental in achieving a consensus outcome.

3. Workshop participants

An initial list of workshop participants (Attachment A) has been established with a view to achieving the objectives described above.

This initial list is heavily skewed towards Melbourne and to a lesser extent Sydney.

However, it is fully expected that this will be re-balanced by the selection of more market participants from SA and QLD and also by encouraging Industry Associations and Consultants and others to travel to workshops away from their home bases. This list is an initial one, which can still be culled, and it should be noted that while not all invitees are likely to attend, it gives a fairly strong indication that a total of 4 or 5 workshops will be required to complete the roadmap exercise. It should also be noted that, whilst there are many common elements to DM throughout the NEM, there are also some important regional differences and characteristics.

If necessary and if all else fails, a second workshop in Melbourne could be an option in addition to workshops in Sydney, Brisbane and Adelaide.

This fine-tuning of numbers and locations is a matter that can be executed once the funding to proceed with the workshops has been secured.

This list of participants is comprehensive to ensure that the inputs and outputs of the process encompass the full range of potentially effective DM activities and initiatives. It is also representative of the various stakeholders and market participants so that a broad range of issues is captured and there is 'buy in' from a range of potential contributors.

An important aspect of the workshop process is that it is imperative to restrict the numbers attending a workshop. When groups become too large, it can inhibit potentially valuable contributions and it can also have an adverse effect on achieving individual buy-in and consensus in the group. For this reason it is envisaged that an individual workshop should consist of no more than 15 to 20 people, and the number of workshops should be restricted to the minimum practical to achieve the objectives.

It is probably no exaggeration to state that getting the participants to the process right is likely to be the single most important factor in the success of this effort.

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Attachment A DM Roadmap Workshop Participants

Categories	Organisation	Individual	Workshop Location				Title	Comments
			Melb	Syd	Bris	Adel		
1) Industry Associations								
	ACA (Australian Cc	Charles Britton			1		Senior Policy Officer, IT and	Marrickville NSW 2204
	AEEMA (Australian	Brian Douglas			1		Deputy Chief Executive	Canberra ACT 2601
	AEPCA (Australian	Peter Szental	1				Managing Director ECS	Melbourne VIC 3004
	ATA (Alternative T	Rachel Ollivier	1				CEO	Fitzroy VIC 3065
	BCSE (Australian E	Ric Brazzale	1				Executive Director	Carlton VIC 3053
	EAG (Energy Actio	John Dick	1				President	North Melbourne VIC 3051
	ESAA (Energy Supj	Harry Schaap	1					Melbourne VIC 3000
	EUAA (Energy Use)	Roman Domanski	1				Executive Director	Box Hill VIC 3128
	EUAA (Energy Use)	Josh Hankey			1		Development Manager - QI	Hawthorne QLD 4171
2) Market Participants								
TNSP's	Powerlink	Alison Gray				1	Manager Network Assessm	Virginia QLD 4014
	Transgrid	Phil Gall			1		Manager Regulatory Affairs	Sydney South NSW 2000
	Vencorp	Joe Spurio	1					Melbourne VIC 8005
	ElectraNet	???						
	Transend	???	1					
DNSP's	Country Energy	Leith Elder			1		Assets Development Mana	QUEANBEYAN ACT 2620
	Energy Australia	Robert Smith			1		Contestable Market Design	Sydney NSW 2000
	Integral Energy	Frank Bucca			1		Demand Management & Ut	Blacktown NSW 2148
	United Energy	Aaron Reid	1				Marketing Manager	Moorabbin VIC 3189
Generators	Auspower	Jeff Donley	1					Melbourne VIC 3000
	Loy Yang Power	Ken Thompson	1				General Manager Marketing	Traralgon VIC 3844
	Southern Hydro	Darryl Flukes	1				General Manager, Energy T	Melbourne VIC 3000
Retailers	Origin Energy	Julian Turecek	1				National Manager Regulati	Melbourne VIC 3000
	TXU	Len Gill	1				General Manager	Melbourne VIC 3000
	AGL	Alex Cruikshank	1				Manager NEM Developmer	Melbourne VIC 8001
	Engex	David Rylah			1		Wholesale Markets Manage	North Sydney NSW 2000
	Ergon	Blair Hammond				1	Manager Market Developm	Brisbane QLD 4000
Others	D Cypha Trade	Carolyn Beshay			1		Marketing & Communicati	Sydney NSW 2000
	NEM - AP	Adam Bisits	1				Chairman	Kew VIC 3101
	Nemmco	Kate Summers	1				Power System Support Spe	Melbourne VIC 3000
	Next Gen	Ken Edwards	1				Director, Energy	Melbourne VIC 3000
	Westpac	David Krsevan			1		Energy Trader - Financial M	Sydney NSW 2000
3) NGO's								
	Cool Communities	Kirsten Macey				1	Facilitator	QLD 4000
	Cool Communities	Felicity Calvert			1		Facilitator	NSW 2000
	CCSA (Conservati	Jessica Gilding				1		SA 5000
	Cool Communities	Andrew Nance				1	Energy Facilitator	SA 5000
	Cool Communities	Michelle Burton	1				Facilitator	VIC 3000
	Environment Victo	Darren Gladman	1					VIC 3000
	Environment Victo	Daniel Voronoff	1				Energy Facilitator	VIC 3000
	ICLEI (Internationa	Alison Cleary	1					VIC 3000
								Will assist to identify local government reps with experience

MEFL (Moreland E Esther Abram	1		CEO	Brunswick	VIC 3056
TEC (Total Enviror Jeff Angel		1	Executive Director	Sydney	NSW 2000
TEC (Total Enviror Jane Castles		1		Sydney	NSW 2000
Business SA ???			1		

4) Government

DIER Tasmania	Scott Dobie	1			General Manager, Infrastruc Hobart	TAS 7000
DITR	Sally Moxon		1			
DITR	Helen Bennett		1		Team Leader - Energy Mark CANBERRA	ACT 2601
DITR	Helen Ratcliffe		1		Assistant Manager - Retail, CANBERRA	ACT 2601
SEAV	David Young	1			Chief Executive	Melbourne VIC 3000
SEAV	Paul Murfitt	1				Melbourne VIC 3000
SEDA	Chris Dunstan		1		Project Leader	Sydney NSW 2000
Victorian Govern	Mark Dess	1			Greenhouse Policy Unit	
Local Government	Various	1	1	1	1	

ICLEI will provide reps for each workshop

5) Jurisdictions

ACCC	Sebastian Roberts	1			Director - Regulatory Affairs	Melbourne VIC 3000
ESC	David Cornelius	1			Project Director	Melbourne VIC 3000
ESCOSA	Lew Owens			1	Industry Regulator	Adelaide SA 5000
ESCOSA	Bob Burgstade			1		Adelaide SA 5000
IPART	Eric Groom		1		Director Analysis and Policy	Sydney NSW 2000
NECA	Paul Dunn			1		Adelaide SA 5000
QCA	Garry Henry		1		Director	Brisbane QLD 4000

Enquire who should represent ACCC

Replace Eric with Fiona Towers or Michael Seery

6) Consultants & Others

Charles Rivers Ass	Jim Snow			1	Vice President	Aspley QLD 4043
CSIRO	Stephen White		1		Business Development Manager	Newcastle NSW 2300
Embedded Genera	Mike Westwood	1				Box Hill VIC 3128
Energetics	Tony Cooper		1		Managing Partner	North Sydney NSW 2060
Energy Advice	Rick Gallienne	1			Director	Mulgrave VIC 3170
EON	Muriel Watt		1			
Firecone	Jamie Carstairs	1			Director	Melbourne VIC 3000
Fraser Consulting	Ross Fraser	1			Director	Malvern VIC 3144
Gallagher Associat	Jim Gallagher	1			Principal	Park Orchards VIC 3114
Key Energy and Re	Mark Searle	1			Principal Consultant	Caulfield South VIC 3146
Marsden Jacobs	Jeff Washusen	1				Camberwell VIC 3124
Sustainable Soluti	Alan Pears	1			Director	Brighton VIC 3168
Sustainability Cent	Mark Diesendorf		1		Director	Epping NSW 1710
UNSW	Hugh Outhred		1		Associate Professor	Sydney NSW 2060
UTS Sydney	Frank Muller		1			Broadway NSW 2007
UTS Sydney	Keith Tarlo		1		Senior Research Consultar	Broadway NSW 2007
Electricity Consum	Richard Blandy			1	Chairman, School of Intern	Adelaide SA 5000

7) Energy Users

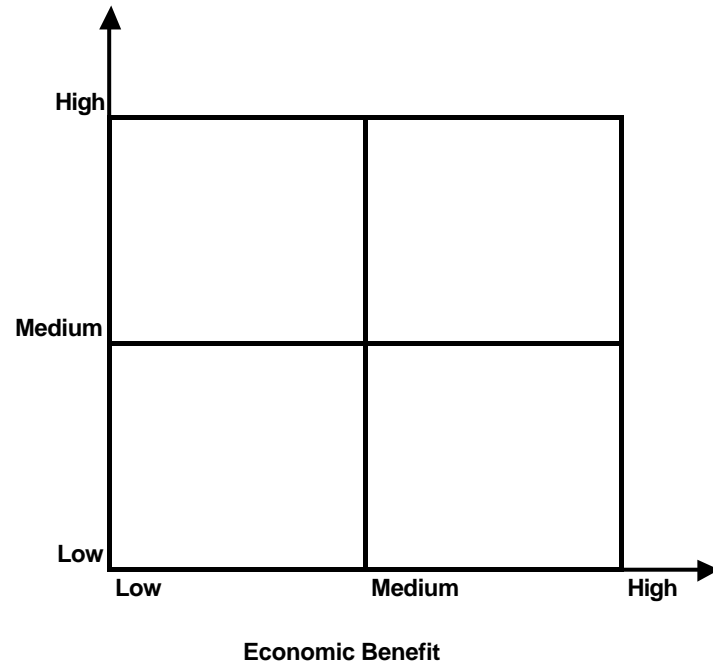
Adelaide Brighton	Michael Jones			1	Group Technical Manager	Port Adelaide SA 5015
Amcor	Peter Dobney	1			National Energy Manager	Richmond VIC 3121
Melbourne Water	Ken Baxter	1			Energy & Greenhouse Emis	Melbourne VIC 3001
Murray Goulburn	Leon Ryan	1			Project Engineer	Melbourne VIC 3056
One Steel	John Davies		1		Strategic Sourcing Manage	Mayfield NSW 2304
SA Water	Keith Hendry			1	Project Manager Corporate	Adelaide SA 5000
Sydney Water	John Petre		1		Energy Planning Manager, I	Sydney South NSW 1232
Yamasa Seafood A	John Shaw	1				Laverton North VIC 3028
BCC	Andrew Aitken			1		

Totals 42 27 8 11 88

Mel Syd Bris Adel Overall

Attachment C DM Roadmap Workshop Directional Policy Matrix

MW Savings



Attachment D – DM Roadmap Workshop Studies & Reports used as information resources

Study/Report Name	Author(s)	Source	Subject/Purpose	date	status	Comments
Inquiry into the role of demand management and other options in the provision of energy services	IPART	IPART website http://www.ipart.nsw.gov.au/	To determine how DM can contribute to energy supply	October 2002	completed	
Electricity Demand Side Management Study	VENCOR/ Charles River	VENCORP website http://www.vencorp.com.au/html/index.htm	To determine if Government can assist in achieving proper DS participation	September 2001	completed	
Distribution Network Barriers to Embedded Generation	COAG/Charles River (Parer)	COAG website http://www.energymarketreview.org/	To assess impediments and consider overcoming barriers to embedded generation	October 2002	completed	
Demand Management Technical and financial Feasibility	IPART/Charles River	IPART website http://www.ipart.nsw.gov.au/	To determine economic feasibility of DM	March 2002	completed	
Policy Options for Energy Efficiency in Australia	ACRE/Alan Pears/Deni Greene	ACRE NSW Website http://www.acre.ee.unsw.edu.au	To put energy efficiency on the agenda	January 2003	completed	
Driving Energy Efficiency	BCSE	BCSE website http://www.bcse.org.au/	Discussion paper for policy development for energy efficiency	November 2003	completed	
Sustainable Energy Jobs Report	SEDA/Allens	SEDA website http://www.seda.nsw.gov.au/	Looks at jobs from SE, includes DM section	January 2003	completed	
?	MCE/Firecone	DITR website http://www.industry.gov.au/				
Towards a National Framework for Energy Efficiency –	MCE/E2G2	DITR website http://www.industry.gov.au/	Discussion paper seeking inputs for energy efficiency	November 2003	completed	

Issues and Challenges						
Assessment of Parer "Pay as bid" proposal	Firecone/COAG	COAG website http://www.energymarketreview.org/				
A Demand Side Response Facility for the National Electricity Market	EUAA/Pareto	EUAA	Report on the trial of a DSR facility	November 2003	Not yet issued	

Attachment E – DM Roadmap Workshop Agenda

Time	Agenda Item	Presenter/Participants
09:00	Welcome and introductions (around table)	Facilitator
09:15	The overall objectives of the DM Roadmap Workshops	Steering committee member
09:30	How will the outputs of the multiple DM Roadmap Workshops be finalised into a Roadmap document	DPPL
09:45	Explaining the DM Roadmap Workshop Process	Facilitator
10:30	Morning Break	All
11:00	First workshop session – Energy Efficiency and interval metering matrices	All
12:30	Break for Lunch	All
13:30	Second Workshop Session – Load Shedding and Demand Control Technology matrices	All
15:00	Afternoon Break	All
15:30	Third Workshop Session – Embedded Generation, Fuel Switching and alternatives to air-conditioning matrices	All
16:30	Presentation of Comparison Matrix showing the day's workshopped results	Facilitator
16:45	Group Discussion of results	All
17:00	Thanks and advice on next steps	Facilitator
17:10	Close proceedings	Facilitator