Jemena Gas Networks (NSW) Ltd

2020-25 Access Arrangement Proposal

Attachment 2.2

JGN's customer engagement

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hear every voice, know where you stand

A member of RPS Group Plc

JEMENA DELIBERATIVE FORUM SUMMARIES

Mid-Program Summaries

April 2019

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Document
Jemena Gas Networks Deliberative Forum Mid-Program Summaries

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INTRODUCTION

Jemena Gas Network (JGN) has engaged Straight Talk to design, facilitate and report on a series of customer engagement activities during 2018. The purpose of the engagement program is to:

- Identify customer priorities and preferences to inform the 2019 Revenue Proposal
- Understand the trade-offs customers are prepared to make in terms of quality of supply vs price
- Explore a wide range of specific issues that will help different parts of the business incorporate customer values, priorities, and ideas into the day-to-day work they do in delivering gas in NSW.

This report covers our first round of engagement held from February-June 2018, segmented by location.

As background, in 2017, Straight Talk was first engaged by Jemena to support them in designing a first phase of engagement and embedding a 'customer first' culture. We worked with communities that were hard-to-reach, from culturally and linguistically diverse backgrounds, and varying socio-economic status. We sought direct feedback from customers on the topics they wanted to be engaged on, the information they needed provided to them, and the type of activities that customers wanted to be involved in.

Our design of the engagement process with Jemena focused on deep and meaningful engagement that they can rely on. We focused on deliberative approaches bringing together several elements including random selection, access to information, and collaborative and consensus decision-making. This is characterised by the 'empower' end of the IAP2 spectrum. Now halfway through, we provide this as an update report and summary of our learnings so far.

This is a summary of deliberative forums held in Bathurst, Griffith, Goulburn, Newcastle and Western Sydney with household customers, and study circles with customers over the age of 55. Engagement commenced in May 2018 and the forums featured randomly selected participants in each community meeting twice on two consecutive Saturdays.

The purpose of these forums was to:

- Create an informed group of everyday citizens who would have the time to learn and understand Jemena's key challenges and work, through a series of activities, to identify what is important to them as customers
- Understand customer priorities, values and expectations of gas now and in the future, to directly shape and inform the Regulatory Proposal
- Ensure consistency, as broadly the agenda for all three forums was the same – there were some minor changes to the order of some activities for Western Sydney.

Study circles were also with randomly selected participants, mostly over the age of 55. A handful of participants were younger, new migrants experiencing financial stress.

All forums broadly followed the same agenda and the study circles asked very similar questions.

All information provided was supported by video or handout materials and Jemena staff were on hand to answer questions and explain technical aspects. Participants were encouraged to 'interrogate' the information and staff as they saw fit in order to be able to participate actively and confidently.

Some of the key learnings are that participants wanted increased access to information to assist with decision making, and in order to provide in-depth feedback, they need to know what impact decisions made today will have on the future bill. Reviewing the long list of questions that Jemena wanted to ask, it is clear that most of them have been asked, in some form, in the early sessions. What remains now is to build on the expertise and understanding within the existing groups so they can explore, in greater depth, key issues.

These lessons learnt will help shape the content and questions for forum three.

The focus for the first two forums, and for the study circles, was to understand customer values and priorities across fairness, price, reliability and future planning.

A future forum (forum three) will 'test' options developed as a result of this customer feedback. These are scheduled for August. Each group will be reconvened in each location and follow the same agenda, for consistency in analysis of results.

A summary of each forum is presented within this report, together with the outcomes of the study circle, and an analysis and amalgamation of all results is presented in the first chapter.

OVERALL RESULTS

WHERE DID WE GO?

Here is a map of the Jemena distribution area, with the communities that were visited in green. There were five first rounds of two deliberative forums and two study circles:

WHO DID WE SPEAK TO?

We spoke with over 100 randomly selected Jemena customers over May and June 2018 across the five communities of Griffith, Goulburn, Western Sydney, Newcastle and Bathurst, and one study circle for low income earners / over 55s located in Parramatta and surrounds. This section details the overall activity results, in a readable format.

Gender	Age group	CALD	Work status	Home status	Household type
Female 59%	Gen X: 52%	CALD: 11%	Full time: 41%	Home owner / mortgage: 58%	Couple with children: 43%
Male 41%	Gen Y: 29%	Non-CALD 89%	Part time: 17%	Renting: 43%	Shared household: 19%
	Baby Boomers: 13%		Casual: 17%		Lone household: 16%
	Gen Z: 7%		Retired: 14%		Couple no children: 15%
			Seeking work: 10%		Single parent: 8%

THEMES

Authentic Listening

Participants stated on numerous occasions they valued hearing from Jemena employees and the knowledge that was shared.

- *"Love how Jemena are interested in what the consumers concerns are and what is important to them ..." (Griffith)*
- *"The opportunity to feel valued of my opinion without judgement..." (Goulburn)*

Fairness

People enjoyed debating the concepts of fairness and felt that they would be more accepting of a fee increase if there was transparency of use. The sessions focused strongly on the outcomes of decisions and flow-on effects to vulnerable customers. There was some discussion as to how these vulnerable customers would cope with any changes into the future.

- *"To take off pressure, bills could perhaps be more upfront about where the money is being distributed - used on. I would certainly be more accepting of the fee increase knowing it was fair and worthwhile." (Participant, Griffith)*

Sharing views

Some participants indicated they changed their view over the course of the sessions on fairness; through sharing views with others that were different to their own. Many attendees were surprised at all the different views across the group.

- "*Looking at others priorities*" (Western Sydney)
- "*Others perspectives regarding what's important*" (Newcastle)

Price and Affordability

Participants mentioned affordability and price were key, however they were also focused on paying for capital expenditure now, for the benefit of future generations.

- *"Fairness and price is what's important to myself and others. Almost everyone I spoke to said they want it to fair for all and the costs to be the same with all companies." (Newcastle)*
- *"To keep the pipelines maintained, a bill to increase this makes sense (...) 'a stitch in time' as Nana says..." (Goulburn)*

Learning and education

Participants reflected on their learning about priorities, gas, gas pricing and production over the course of the sessions. They also indicated they potentially take the gas service for granted.

- *"Didn't know Jemena before" (Newcastle)*
- *"The most valuable thing I learnt today is that I am extremely naïve about how gas arrives into my house i.e. the outlay of service. (Bathurst)*

Transparency

This theme emerged across many comments. People agreed that, in relation to operational and capital expenditure, as well as treatment of vulnerable customers, transparency was key.

- *"It was thought provoking, and feel it is a worthwhile use of community opinion" (Bathurst)*
- *"Transparency of costs" (Western Sydney)*
- *"As the content was more detailed, so informed information is given to the future, which is not only important to now but the next generations" (Goulburn)*

Thirst for knowledge

Participants really threw themselves into the topic area and had really insightful feedback and questions. The information given in the forums was reflected on by participants later as an increase in learning. As an indicator, they came up with many complex questions for the Jemena team, with some examples below:

- *"I now actually understand gas pricing, which will allow me to find the best deal" (Bathurst)*
- *"What does Jemena define as fair?" (Bathurst)*
- *Is Jemena looking into using blockchain technology to improve business systems? (Bathurst)*

COST OF LIVING EXERCISE

Overall, mortgage and rent, followed by electricity, groceries and transport were mentioned. Overall, gas featured sixth on the list. Whilst some agreed their expenses were the same as five years ago, some agreed electricity had moved up the list to be more expensive. We asked this question to be a conversation starter and ice breaker, and a great way to understand where gas sat in terms of overall household expenditure. The overall results are included below.

In terms of each community, there were some slight variations; at Goulburn gas rated fourth on the list, and at Bathurst and Western Sydney, gas was second last on the list of expenses. The results by community are included below, with variations highlighted. Please note the small sample size.

Expense	Overall	Griffith	Goulburn	Western Sydney	Newcastle	Bathurst	Study Circles
Mortgage / rent	**79%**	**90%**	**74%**	**81%**	**84%**	**91%**	**61%**
Electricity	64%	80%	74%	63%	42%	73%	56%
Groceries	59%	80%	61%	56%	84%	45%	44%

Transport	28%	10%	17%	38%	26%	32%	39%
Healthcare	22%	0%	13%	31%	32%	23%	28%
Gas	**19%**	**20%**	**43%**	**6%**	**16%**	**9%**	**22%**
Phone / internet	8%	10%	13%	13%	5%	5%	6%
Education	8%	0%	4%	6%	5%	18%	11%

Q: Rank your cost of living pressures (top 3 box). Base: 108. Don't know / can't say excluded. ** Please note the low base.

Other cost of living expenses mentioned by forum attendees not on this preselected list included:

Animals - for example, horses	Education expenses
Council rates, water rates	Funeral insurance
Other vehicle costs	Insurances - home and contents, car
Childcare	Personal loans

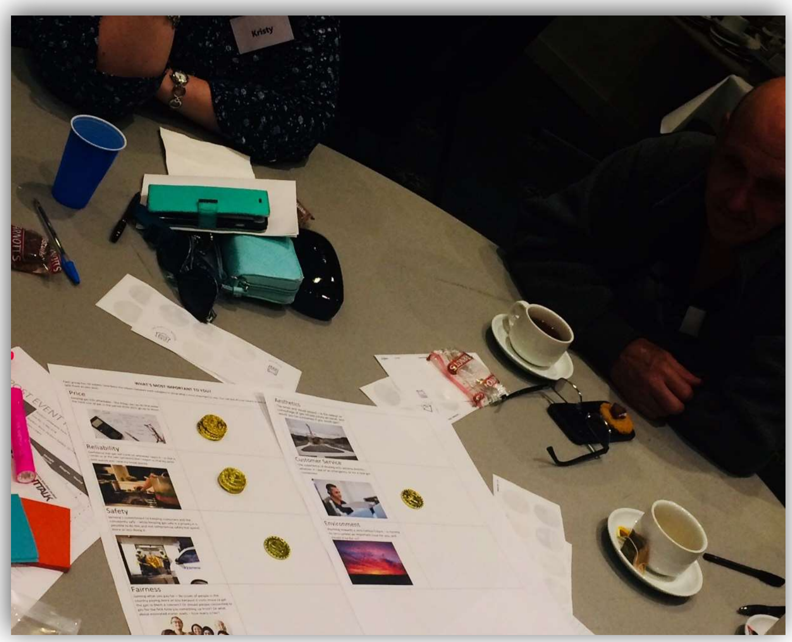
APPLIANCES IN THE HOME

In response to this question, participants reflected on their appliance types in the home. Understandably those who rent have less control over their appliance types and fuel source than those who have purchased a home. We asked this question as an icebreaker for the workshops, to understand the combination of appliances in individual homes and for participants to discuss the reasons why. Most common appliance type by this sample size is gas water heater, followed closely by gas stove top.

Appliance type	Percent	Frequency
Gas water heater	84%	98
Gas stove top	74%	86
Gas heater	49%	57
Gas oven	35%	41
Gas central heating	14%	16

Q: What appliances do you have in your home? By frequency of mention and percent. Base: 116. NB: multiple responses could be selected for this question. * Caution low base

- *"We live in rental, appliances quite old. Not up to me to replace things." (Study Circle)*
- *"I would stay with gas - much more affordable" (Bathurst)*
- *"Blackout - you still can cook" (Newcastle)*
- *"Gas cooking important, must-have" (Western Sydney)*
- *"Gas is a choice" (Griffith)*
- *"Availability a positive, bottled gas an issue" (Bathurst)*



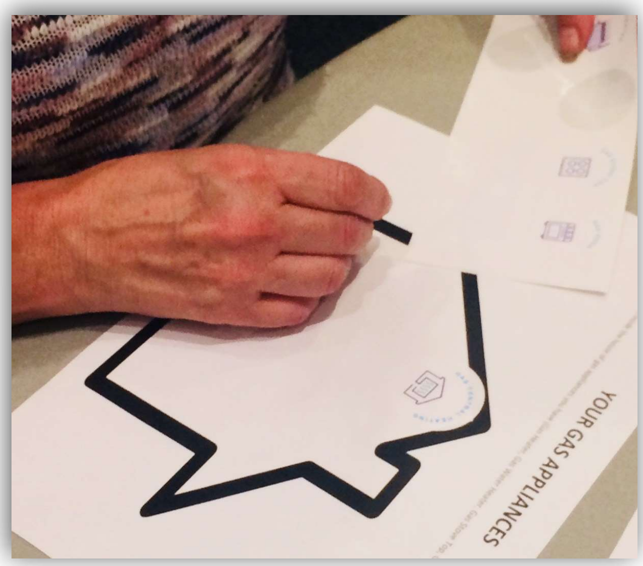
AT WHAT POINT WOULD AN INCREASE IN BILL IMPACT YOUR LIFESTYLE? (BILL SHOCK)

One-third of participants agreed an increase of $50-$80 is the point where they would need to adjust their lifestyle in relation to an unexpectedly high bill. 5% identified $20 or less with the remainder $100 or more. We asked this question because we wanted to understand where the increases sat in terms of impact on the household budget.

Amount	Percent	Frequency
$50	30%	29
$100	19%	18
$140	17%	16
$120	10%	10
$20	5%	5
$80	0%	0

Q: At what point does the gas bill prompt you to change your lifestyle? When it is: $20, $50, $80, $100, $120, $140 higher? Base: 96. NB: Study Circle not asked this question. ** Caution low base size

- *"$80-$100 depending on gas price rises and seasonal impacts (eg warmer winder in the price year)"(Goulburn)*
- *"I think of gas and electricity as one bill. Both are essential to me and I would forgo other things to meet the cost" (Western Sydney)*
- *"$100 is the point where I might panic but we work hard to be comfortable." (Griffith)*
- *"Would continue to use gas and reduce Netflix etc" (Bathurst)*



STRAIGHT TALK hear every voice, know where you stand

PRIORITIES - NOW - OVERALL

There were differences that emerged between the five communities completing the prioritisation exercise as demonstrated below. Although price, reliability and safety moved to the top of the list, fairness was more of a priority in Griffith, Western Sydney and Bathurst. The other two clear outcomes were that overall; aesthetics did not rate at all strongly across any of the forums. Given the major impact of reducing prices and the impact on reliability, this is important information for Jemena.

Priority - now	Griffith	Goulburn	Western Sydney	Newcastle	Bathurst	Total
Price	**8**	**9**	**12**	**11**	**11**	**51**
Reliability	5	7	8	9	10	39
Safety	4	7	8	9	5	33
Fairness	5	3	5	4	6	23
Environment	4	7	3.5	5	4	23.5
Customer Service	2	7	3.5	2	3	17.5
Aesthetics	2	0	0	0	0	2

PRIORITIES - FUTURE

This question prompted some participants to rethink their initial views on fairness, and they expressed surprise at different views. Prior to this activity, we showed videos demonstrating many different perspectives about the future of hydrogen technology. Participants were asked, as a table, to rank future priorities, with their same ten coins to 'spend' against each priority (Please note, in later forums, this activity was simplified, and participants were asked to rank each priority from 1 to 4 as a table).

Overall, Zero Carbon energy for all of Australia was a priority across the communities. However, there were still some variations within the individual groups. For example, at Goulburn, there was a general consensus about individuals meeting their own energy needs. This was contrasted with Griffith and Western Sydney, that focused on the highest priority being Zero Carbon energy for all of Australia. Newcastle prioritised energy efficiency above all (although only just above zero carbon).

We asked this question to encourage customers consider the future priorities for energy and for Jemena. It is helpful to encourage participants to consider different perspectives, and alternative points of view. It is also helpful for Jemena to understand how customers intend to engage and their expectations of the network role in the future. The overall results are on the following page.

Priority - future	Griffith	Goulburn	Western Sydney	Newcastle	Bathurst	Total
Zero Carbon energy for all of Australia	**9**	**7**	**12**	**11**	**14**	**53**
Reducing our need for energy (energy efficiency)	8	10	11	12	9	50
Individuals meeting their own energy needs	7	14	11	8	9	49
Reducing the cost of energy for all customers	6	9	6	9	5	35

Regarding the fifth question, around having multiple sources of energy in your home, participants discussed reducing our need for energy through education. They also felt that this offered flexibility in regards to different uses. As forum attendees commented:

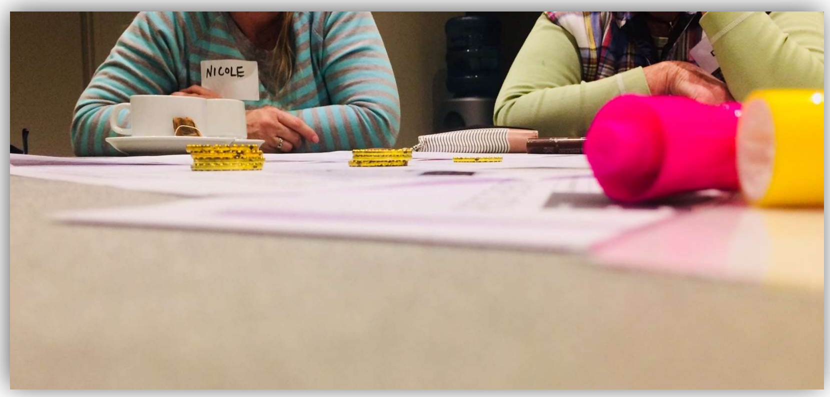
- *"Yes - flexibility, comfort, guard against no power..." (Bathurst)*
- *"Like [that] for longer outages to still be able to cook or shower..." (Newcastle)*

It was evidenced that there are a range of different views across these communities and differences of opinion, even with a small amount of people who are a representative sample. It was challenging to reach consensus on any of these aspects, even though respectful deliberative discussion between participants.

FAIRNESS QUESTIONS - RESULTS

On the second day with participants we started to delve into specific issues where Jemena has decision to make, or where there are options that would allow us to reduce costs. The aim of these discussions was to feed into the options for further consultation, and to understand what information customers would need to be able to make recommendations in these areas.

We asked questions around depreciation, capital expenditure, vulnerable customers and gas pressure across the network. These questions were completed as table discussions in groups of 4 to 6 people. Where possible, table scores were collated in response to each question from verbal feedback and summarised by the facilitator, who took the 'temperature' of the room. When this was not available, individual written comments and notes were categorised and analysed.



Q1: With uncertainty whether our pipes will actually be used beyond 2050, would it be fairer for current customers to pay more for new investments we make on the network relative to future customers?

After deliberation and discussion, in general forum attendees agreed across their tables that yes, this would be fair. A third of attendees want more information in order to decide. A breakdown of the written notes and comments are included below.

	Griffith	Goulburn	Western Sydney	Newcastle	Bathurst	Study Circles	Total
Yes - Fair	19	19	10	13	13	17	91
No - Not fair	8	1	2	3	1	0	15
Communications and transparency comment	0	0	0	3	0	5	8
Undecided / need more information	4	10	7	2	3	1	27

Q2: Would it be fairer for new customers to contribute to the cost of their connection, when in the past they haven't had to contribute?

The majority of forum participants agreed that yes, it would be fair. Attendees compared this to practices in other industries, though they were concerned about the potential consequence of fewer people joining the gas network, and the subsequent impact on prices.

	Griffith	Goulburn	Western Sydney	Newcastle	Bathurst	Study Circles	Total
Yes - Fair	**12**	**15**	**15**	**22**	**28**	**13**	**105**
No - Not fair	5	3	6	10	9	1	34
Incentive suggestion	6	8	8	1	5	0	28
Undecided / need more information	4	3	5	5	4	1	22

Q3: Is it fair that everyone pays a little more to help fund programs led by Jemena to assist vulnerable gas customers? *

(*Note: Q3 asked in Griffith, Goulburn, Study Circles and Western Sydney only)

Generally, across all communities, although narrow majority answered yes, other answers were split into thirds between no – not fair, and identifying who is vulnerable, as you can see from the detail below, and the overall theme was ensuring those who were vulnerable got the most benefit (for example, selection criteria). This question did not have sufficient customer support to consider taking it forward in further consultation.

	Griffith	Goulburn	Western Sydney	Study Circles	Total
Yes - Fair	**23**	**8**	**21**	**9**	**61**
No - Not fair	16	3	2	0	21
Identify who is vulnerable	6	2	10	2	20
Undecided / need more information	8	3	10	7	28

Q4: Is it fair that the pressure in the network is lower in some areas than others meaning some customers can't use modern gas appliances, specifically hot water?

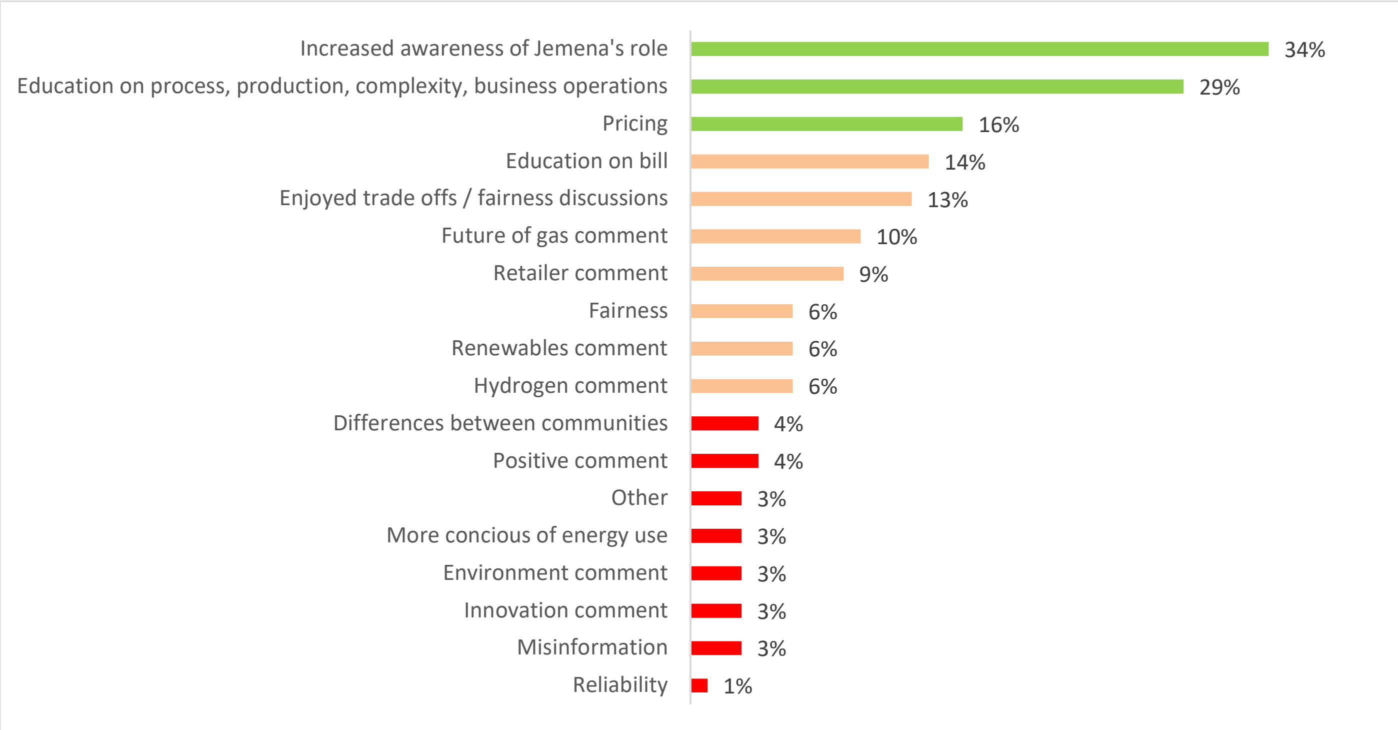
Many attendees needed more questions answered and more information prior to deciding on this. After deliberation, four of the six forums agreed no, this was not fair, that upgrades should happen because everyone should get the same service, however a third of respondents overall thought that yes, it was fair, provided households were made aware of the poor pressure prior to moving into the area.

	Griffith	Goulburn	Western Sydney	Newcastle	Bathurst	Study Circles	Total
No - Not fair	**8**	**7**	**23**	**19**	**13**	**4**	**73**
Yes - Fair	5	7	7	8	7	3	37
This is a complex question and I need more information and education	6	3	23	8	13	5	60

WHAT DID YOU LEARN?

The response to these questions are broken down in terms of top theme. Although designed as an icebreaker, this was a useful exercise for participants to reflect on what they had heard. These questions were asked to help participants reflect on their learning, particularly on the topics of understanding gas, pricing vs reliability and the complexity of bills. This information can be built on, potentially utilised for future communications and marketing. Top response (1 in 3 participants) mentioned they had increased awareness of Jemena's role.

Q1: What do other people think about gas, gas pricing and the future of gas?



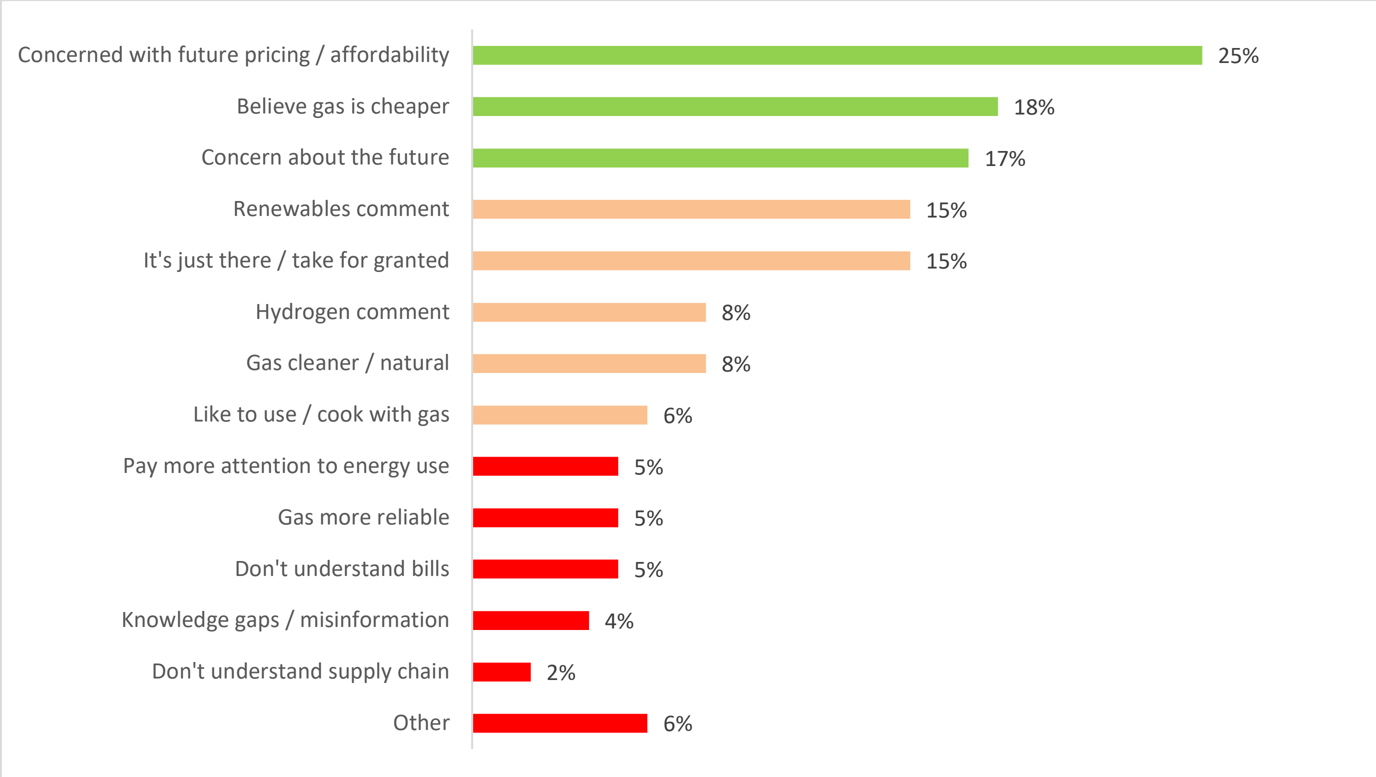
Base: 160 comments.

Some indicative comments from the top three categories are below:

- "*Wasn't aware of the breadth of Jemena's role*" (Goulburn)
- "*The gas supply chain, understanding the delivery*" (Newcastle)
- "*Tension between pricing, reliability and fairness*" (Bathurst)

Q2: What have you learnt - either last week or from the resources that seems important to you?

One quarter of forum attendees commented on their concerns around future pricing and affordability.



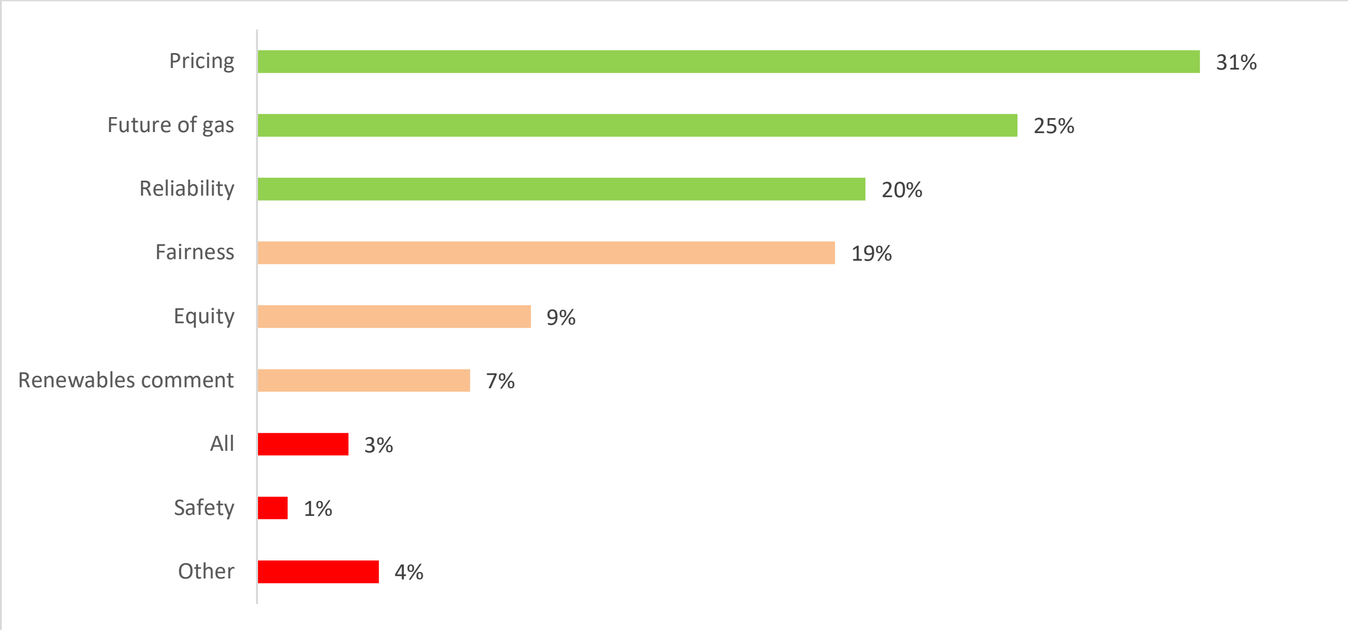
Base: 103 comments.

Some example comments that demonstrate the top three response areas are as follows:

- *"Unless you have an in-depth conversation explaining things like environment, safety etc most people only care about price." (Newcastle)*
- *"Better than electricity (Western Sydney)*
- *"What are / will be the environmental impacts of future hydrogen network?" (Bathurst)*

Q3: Today we are going to explore fairness, the future of gas, pricing and reliability. Which of these is most important to you? Why?

One third of participants indicated pricing was most important to them, followed by the future of gas, and reliability (of supply) fairness (hand in hand with choice) and equity. Please see the following page for breakdown of comments.



Base: 76 comments.

To give a flavour, some indicative comments from the top three categories are included below:

- *"Pricing - Sydney is a very expensive city…" (Western Sydney)*
- *"Reliability - without reliability - none of the other aspects matter" (Newcastle)*

GRIFFITH

WHO DID WE SPEAK TO?

We spoke with randomly selected participants on 12 and 19 May 2018 who were demographically representative of the Griffith area, including attendees from the nearby communities of Leeton and Narrandera.

THEMES

Authentic Listening

Participants stated they valued hearing from Jemena employees and the knowledge that was shared.

- *"Love how Jemena are interested in what the consumers concerns are and what is important to them …" (Participant, Griffith)*

Fairness

Participants enjoyed debating the concepts of fairness at Griffith and felt that they would be more accepting of a fee increase if there was transparency of use.

- *"To take off pressure, bills could perhaps be more upfront about where the money is being distributed - used on. I would certainly be more accepting of the fee increase knowing it was fair and worthwhile." (Participant, Griffith)*

PRIORITIES - NOW

Participants were asked to rank, as a table, seven priorities overall for Jemena now, and were given ten gold coins to 'spend' against each of the priorities. This meant teams were forced to prioritise, and work together. As you can see from the ranking exercise below; overall, price rated most highly. This was followed equally by reliability and fairness. Fairness was of higher concern to Griffith participants compared to some of the other communities. This was reflected in the conversations had by participants across the two forums.

Priority - now	Table A	Table B	Table C	Total
Price	**3**	**3**	**2**	**8**
Reliability	2	2	1	5
Fairness	2	1	2	5
Safety	1	2	1	4
Environment	1	1	2	4
Aesthetics	1	0	1	2
Customer Service	0	1	1	2

PRIORITIES - FUTURE

Prior to this activity, we showed videos demonstrating many different perspectives about the future of hydrogen technology. Participants were asked, as a table, to rank future priorities, with their same ten coins to 'spend' against each priority (Please note, in later forums, this activity was simplified, and participants were asked to rank each priority from 1 to 4 as a table). We asked these questions to encourage customers to consider the future priorities for energy, from a broad customer base perspective. This question prompted some participants to rethink their initial views on fairness, and they expressed surprise at different views. Participants were also prompted consider future technologies, often for the first time. It was helpful to encourage participants to consider different perspectives, and alternative points of view. The overall results are below.

Priority - future	A	B	C	Total
Zero Carbon energy for all of Australia	**3**	**3**	**3**	**9**
Reducing our need for energy (energy efficiency)	3	3	2	8
Individuals meeting their own energy needs	2	2	3	7
Reducing the cost of energy for all customers	2	2	2	6

FAIRNESS QUESTIONS – RESULTS

The reason we asked these questions was to ascertain customer perceptions and opinions about fairness. We framed these as questions around depreciation, capital expenditure, vulnerable customers and gas pressure across the network. These questions were completed as table discussions in groups of 4 to 6 people. Where possible, table scores were collated in response to each question from verbal feedback and summarised by the facilitator, who took the 'temperature' of the room. When this was not available, individual written comments and notes were categorised and analysed.

Q1: With uncertainty whether our pipes will actually be used beyond 2050, would it be fairer for current customers to pay more for new investments we make on the network relative to future customers?

Following from the results of earlier activities, Griffith participants were a little more split on this question. However, after some deliberation, the top response amongst the tables and individuals was yes, it would be fair. Others wanted more information during this decision-making process. Some example comments are below:

- *"The fairest way would be to start charging an extra cost per bill"*
- *"I'd like the bill to stay where it is now. I'm on a tight budget."*

Q2: Would it be fairer for new customers to contribute to the cost of their connection, when in the past they haven't had to contribute?

Most respondents and tables within the workshop suggested that yes, it would be fair, and others had suggestions for how to administer this program. Less than half of participants suggested that no, it wasn't fair, and that regional distance and geography played a part. Some comments that describe these differing positions are below:

- *"Yes. If it is a low and less noticeable fee, the 'sharing' of these fees would be fairer."*
- *"Should be the one price."*

Q3: It is fair that everyone pays a little more to help fund programs led by Jemena to assist vulnerable gas customers? *

(*Note: Q3 vulnerable customers question asked in Griffith, Goulburn, Study Circles and Western Sydney)

Most participants and the table discussions indicated that yes, it was fair to assist vulnerable customers. Some participants indicated that no, there were other programs that support people and others also felt there should be some measures to identify who is vulnerable. Some of the comments demonstrating these different perspectives are below:

- *"Up to $5 is reasonable"*
- *"It's a government social problem, not a Jemena problem"*
- *"It would be hard to decide who is vulnerable"*

Q4: Is it fair that the pressure in the network is lower in some areas than others meaning some customers can't use modern gas appliances, specifically instantaneous hot water?

Most participants felt this would be fair, and other participants felt this would be not fair. Others felt this was a complex question and wanted more information prior to deciding. We will take this forward as a learning for forum three. Some of the comments that support these opposing views are:

- *"Yes - slight gradual increases for gradual changes, only upgrading where necessary, wanted and sustainable."*
- *"I believe it is not fair. If all customers are charged the same price they should have the same product advantages i.e. pressure."*

FEEDBACK

At the end of each session, detailed feedback from participants was sought, via our anonymous feedback forms. Attendees rated all aspects of the workshops including opportunities to participate and engage, the facilitation, the workshop content, workshop objectives, venue and timing. In terms of the results, majority of feedback scores were 4.7 and above (out of 5), across all these aspects. Participants were particularly impressed by opportunities to participate, the facilitation, and Jemena staff being so willing and open to engage with customers.

- *"Love how Jemena are interested in what the consumers concerns are and what is important to them in regard to gas"*

GOULBURN

WHO DID WE SPEAK TO?

We conducted workshops with forum participants held on Saturday 12 and 19 May 2018, hailing from Goulburn and surrounding farming communities into the Southern Highlands.

THEMES:

Fairness and sharing views

Some participants indicated they changed their view over the course of the sessions on fairness - through sharing views with others that were different to their own. Many were surprised at all the different views across the group.

Price and Affordability

Participants mentioned affordability and price were key, however they were also focused on paying now for capital expenditure for the benefit of future generations.

PRIORITIES - NOW

Participants were asked to rank seven priorities, as a table, overall for Jemena now, and were given ten gold coins to 'spend' against each of the priorities. This meant teams were forced to prioritise, and work together. Participants indicated overall that price, reliability, safety, customer service and environment is important to them. At Goulburn, fairness rated less highly than some of the other communities in this research. Please note that price was not absolutely reflected across all tables (as evidenced by the scores below) and aesthetics and fairness were less important to this group.

Priorities - now	Table A	Table B	Table C	Table D	TOTAL
Price	**1**	**4**	**1**	**3**	**9**
Reliability	2	3	1	1	7
Safety	2	0	3	2	7
Customer Service	3	2	1	1	7
Environment	2	0	3	2	7
Fairness	0	1	1	1	3
Aesthetics	0	0	0	0	0

PRIORITIES - FUTURE

Prior to this activity, we showed videos demonstrating many different perspectives about the future of hydrogen technology. Participants were asked, as a table, to rank future priorities, with their same ten coins to 'spend' against each priority (Please note, in later forums, this activity was simplified, and participants were asked to rank each priority from 1 to 4 as a table).

At Goulburn, it was all about individuals meeting their own energy needs. There were also some groups who also prioritised reducing our need for energy (energy efficiency).

Priorities - future	A	B	C	D	TOTAL
Individuals meeting their own energy needs	3	3	4	4	**14**
Reducing our need for energy (energy efficiency)	2	3	3	2	10
Reducing the cost of energy for all customers	4	3	1	1	9
Zero Carbon energy for all of Australia	1	1	2	3	7

Within Goulburn, participants also believed having multiple sources of fuel in the house was thought to be good for choice and convenience.

FAIRNESS QUESTIONS – RESULTS

The reason we asked these questions was to ascertain customer perceptions and opinions about fairness. We framed these as questions around depreciation, capital expenditure, vulnerable customers and gas pressure across the network. These questions were completed as table discussions in groups of 4 to 6 people. Where possible, table scores were collated in response to each question from verbal feedback and summarised by the facilitator, who took the 'temperature' of the room. When this was not available, individual written comments and notes were categorised and analysed.

Q1: With uncertainty whether our pipes will actually be used beyond 2050, would it be fairer for current customers to pay more for new investments we make on the network relative to future customers?

Within Goulburn forums, most customers and table groups responded that yes, it would be fair (19 comments recorded). Next most frequent comment in relation to this question was around more information required to make this decision. Several people indicated there were renewables or alternative energy sources to be considered, and fewer responses indicated they were unsure, and the question is complex. Only one person indicated no. Some comments that describe these positions are:

- *"My priority is the continued maintenance of the pipes for safety. If we are paying a little extra (although I am not in a position of financial security) I would rather pay a little extra for the safety of the future whatever that may be."*
- *"Needs direction from government - government should also be versatile in looking at options ..."*

- *"To keep the pipelines maintained, a bill to increase this makes sense (...) 'a stitch in time' as nana says..." (Goulburn)"*

Q2: Would it be fairer for new customers to contribute to the cost of their connection, when in the past they haven't had to contribute?

Majority of participants responded that yes, it would be, and these participants also had suggestions about implementation. Some indicated that no, it would not be fair.

- *"My personal experience is that it is fair"*
- *"You need incentives as well"*
- *"Scare people away by charging"*

Q3: Is it fair that everyone pays a little more to help fund programs led by Jemena to assist vulnerable gas customers? *

(*Note: Q3 vulnerable customers question asked in Griffith, Goulburn, Study Circles and Western Sydney)

Some participants thought this was fair, and others thought Jemena would need to identify who was vulnerable. A few indicated this was not fair. Although there were a range of views in the room, all except one table could agree. Here are the comments that reflect the scope below.

- *"I think Jemena should support vulnerable customers regardless whether it comes from profits or is charged to consumers. Makes Jemena more humanistic [sic] and involved in the community"*
- *"Advocate for vulnerable clients to get education regarding programs / support before offering this funding"*
- *"No - I feel that there are organisations that already do this - Centrelink provides supplements to assist their clients"*

Q4: Is it fair that the pressure in the network is lower in some areas than others meaning some customers can't use modern gas appliances, specifically instantaneous hot water?

Overall, a third of participants indicated this was fair. The other third of attendees indicated this was not fair. A few wanted to upgrade for safety reasons, and a few participants also indicated this was a complex question. Some of the comments representing these different views are:

- *"Fairer to pay the same rate and receive the same service."*
- *"I don't think it's fair that the existing customers pay for the upgrade. As long as pressure is fair and safe it's fine."*

FEEDBACK

At the end of each session, detailed feedback from participants was sought, via our anonymous feedback forms. Attendees rated all aspects of the workshops including opportunities to participate and engage, the facilitation, the workshop content, workshop objectives, venue and timing. Feedback from participants was overall very positive. The scores ranged from 4.4-4.9 out of 5, with majority of scores being 4.8 and above. Participants were particularly impressed by the content, timing and facilitation. Some of the comments that reflect this are detailed below:

- *"I enjoyed the format and especially the moving of people and tables, and the speed dating exercise"*
- *"Interesting. Nicola kept us on our toes and ran the group extremely well"*

WESTERN SYDNEY

WHO DID WE SPEAK TO?

We hosted participants who are demographically representative of Western Sydney in on Saturday 26 May and 2 June 2018. Participants were from Toongabbie, Epping, North Parramatta, Harris Park, Ryde and Seven Hills plus Baulkham Hills. A mix of age groups, genders and household types, participants languages spoken at home included Hindi, Malayalm, Teleguau, Bengali, Vietnamese, Russian, Phillipino, Chinese and Bangoli.

THEMES

Learning and education

Participants reflected on their learning about priorities, gas, gas pricing, and production over the course of the sessions. They also indicated they potentially take the gas service for granted.

Transparency

This theme emerged across many comments. Participants agreed that in relation to operational and capital expenditure, as well as treatment of vulnerable customers, transparency was key.

PRIORITIES - NOW

Participants were asked to rank seven priorities overall for Jemena now, as a table and were given ten gold coins to 'spend' against each of the priorities. This meant teams were forced to prioritise, and work together. As you can see from the table below, price came out as an overall winner, with reliability and safety as equal second. Fairness was number four in the list, neither high nor low compared to other communities. Although at one table, customer service was equally important, generally customer service, environment and aesthetics were lower overall as priorities.

Priorities - now	Table A	Table B	Table C	Table D	TOTALS
Price	**2**	**2**	**4**	**4**	**12**
Reliability	2	2	1	3	8
Safety	2	3	1	2	8
Fairness	1	1	3	0	5
Customer Service	2	1	0	0.5	3.5
Environment	1	1	1	0.5	3.5
Aesthetics	0	0	0	0	0
TOTALS	10	10	10	10	

PRIORITIES - FUTURE

Overall, participants prioritised zero carbon, closely followed by individuals meeting their own energy needs and energy efficiency.

Priorities - Future	A	B	C	D	Total
Zero Carbon energy for all of Australia	**1**	**3**	**4**	**4**	**12**
Individuals meeting their own energy needs	4	2	3	2	11
Reducing our need for energy (energy efficiency)	2	4	2	3	11
Reducing the cost of energy for all customers	3	1	1	1	6

FAIRNESS QUESTIONS – RESULTS

The reason we asked these questions was to ascertain customer perceptions and opinions about fairness. We framed these as questions around depreciation, capital expenditure, vulnerable customers and gas pressure across the network. These questions were completed as table discussions in groups of 4 to 6 people. Where possible, table scores were collated in response to each question from verbal feedback and summarised by the facilitator, who took the 'temperature' of the room. When this was not available, individual written comments and notes were categorised and analysed.

Q1: With uncertainty whether our pipes will actually be used beyond 2050, would it be fairer for current customers to pay more for new investments we make on the network relative to future customers?

With this group, many agreed that yes it would be fairer for current customers to pay more. Many participants also wished to have more information prior to making the decision, and many had a comment about future energy sources and the network use. Two indicated that no, it wouldn't be fair. Several other comments were made about being unsure, the complexity of the topic and future supply. Some examples of these three top response categories are below:

- *"No problem supporting it"*
- *"Alternative use for gas infrastructure if gas no longer required"*
- *"2050 gas might not be the source"*

Q2: Would it be fairer for new customers to contribute to the cost of their connection, when in the past they haven't had to contribute?

During discussion, participants in this session were split on opinions. After they had deliberated, overall, the tables consisting of forum attendees agreed that yes, this would be fair. Some attendees had a suggestion as to implementation, and some indicated this would not be fair. Some of the comments representing these diverse views are:

- *"[You would] pay anywhere else"*
- *"Developers should pay"*

- *"Some people can't afford the cost of a connection - it's fairer for all if the costs are shared and therefore lower"*

Q3: Is it fair that everyone pays a little more to help fund programs led by Jemena to assist vulnerable gas customers? *

Most participants in this group indicated that yes, it's fair that everyone pays a little more. Some wanted protocols to identify who is vulnerable, and others wanted more educational programs to assist people. Some indicative comments are below:

- *"I think everyone I personally know would be happy paying a tiny amount, nominally $1 or $5 e.g. for 'social services'."*
- *"[I] would suggest [it's] duplicating services of vouchers"*
- *"Helping to put hot water systems in for rebates"*

(*Note: Q3 vulnerable customers question asked in Griffith, Goulburn, Study Circles and Western Sydney)

Q4: Is it fair that the pressure in the network is lower in some areas than others meaning some customers can't use modern gas appliances, specifically instantaneous hot water?

Many forum participants stated this was a complex question and wrestled with this intricacy in the session. Most requested more information (for example, details on the impact on day to day living, planned upgrades prioritising areas with lower amenity) about this decision. After this conversation, majority were of the view was that no, it was not fair and that everyone should be able to access the same pressure regardless of where they are located in the network. Some of the comments demonstrating this range of views are included below:

- *"Everyone should pay for the upgrades"*
- *"Can gas companies do something about this without charging?"*
- *"Want to understand and what's the impact on bills"*

FEEDBACK

At the end of each session, detailed feedback from participants was sought, via our anonymous feedback forms. Attendees rated all aspects of the workshops including opportunities to participate and engage, the facilitation, the workshop content, workshop objectives, venue and timing. Average rating of the by participants was 4.47 out of 5 across all areas of the workshops. Participants were complimentary about most aspects of the workshop but were particularly impressed by the variety of opinions, being listened to, and the education on what's behind the network and energy supply. Indicative feedback was as follows:

- *"I learnt a lot of new things and that it is hard to make some of these decisions"*
- *"Overall I enjoy this process"*

NEWCASTLE

WHO DID WE SPEAK TO?

We spoke with demographically representative participants from across Newcastle and surroundings such as East Maitland, Hamilton, Windale, Mayfield, Bar Beach and Charlestown on Saturday the 16 and 23 June 2018.

THEMES

Fairness

Participants focused strongly on the outcomes of decisions and flow-on effects to vulnerable customers. There was a lot of discussion as to how they would cope with any changes into the future.

PRIORITIES - NOW

Participants were asked to rank seven priorities overall for Jemena now, as a table and were given ten gold coins to 'spend' against each of the priorities. This meant teams were forced to prioritise, and work together. Although there was some variation between the tables, overall, price, followed by reliability and safety were the top picks at Newcastle. As one participant mentioned: "*It's more important that it's safe than it looks good.*"

Priority - now	Table A	Table B	Table C	Table D	TOTALS
Price	**5**	**2**	**2**	**2**	**11**
Reliability	1	3	2	3	9
Safety	3	2	2	2	9
Environment	0	2	2	1	5
Fairness	0	1	2	1	4
Customer Service	1	0	0	1	2
Aesthetics	0	0	0	0	0
TOTALS	10	10	10	10	40

PRIORITIES - FUTURE

Newcastle participants prioritised reducing their need for energy, or increasing energy efficiency. This was slightly different to many of the other communities, as all others had prioritised zero carbon.

Priority - future	A	B	C	D	Total
Reducing our need for energy (energy efficiency)	**4**	**3**	**1**	**4**	**12**
Zero Carbon energy for all of Australia	3	4	2	2	11
Reducing the cost of energy for all customers	1	1	4	3	9
Individuals meeting their own energy needs	2	2	3	1	8

FAIRNESS QUESTIONS – RESULTS

The reason we asked these questions was to ascertain customer perceptions and opinions about fairness. We framed these as questions around depreciation, capital expenditure, vulnerable customers and gas pressure across the network. These questions were completed as table discussions in groups of 4 to 6 people. Where possible, table scores were collated in response to each question from verbal feedback and summarised by the facilitator, who took the 'temperature' of the room. When this was not available, individual written comments and notes were categorised and analysed.

Q1: With uncertainty whether our pipes will actually be used beyond 2050, would it be fairer for current customers to pay more for new investments we make on the network relative to future customers?

Although most participants indicated that yes, it would be fair, several participants flagged the need for transparency and communication around this investment of funds with customers. Some also indicated that no, it would not be fair for those on lower incomes. Here are some comments that represent the spectrum of views below:

- *"Intergenerational equality...."*
- *"$2 ok but no margin. Let us know the reason for it..."*
- *"But $7 can be a lot for some groups i.e. pensioners. We have a social responsibility to ensure equity."*

Q2: Would it be fairer for new customers to contribute to the cost of their connection, when in the past they haven't had to contribute?

Participants were split in their feedback; some felt that yes this was fair, similar to other elective or essential services (electricity, NBN). Some thought that no, this was fair. Others required more information about cost before feeling informed enough to decide, or the cost should be spread amongst all users. Some of the wide-ranging comments are indicated below:

- *"It would be fair for a developer/ builder to incorporate the cost - at least a contribution - of a new physical connection into the house."*
- *"Some people can't afford the cost of a connection - it's fairer for all if the costs are shared and therefore lower"*
- *"All depends on what the charge would be, to enable them to make more informed decision"*

Q4: Is it fair that the pressure in the network is lower in some areas than others meaning some customers can't use modern gas appliances, specifically instantaneous hot water?

Majority of the tables and customers said no, it was not fair, and that everyone should pay for an increase to pressure as it may be a small amount when spread amongst many customers. Some customers agreed this was a complex question with need for more information. A small proportion indicated this was fair, as if the pressure impacted a small proportion of people it would not be worth the upgrade.

- *"Customers don't notice much price increase when Kensington 2kPa network was rehabilitated."*
- *"How many people in the low pressure areas want instantaneous hot water?"*
- *"Why do customers pay more for themselves to have new pipes while they have already paid for new pipes in other areas?"*

FEEDBACK

At the end of each session, detailed feedback from participants was sought, via our anonymous feedback forms. Attendees rated all aspects of the workshops including opportunities to participate and engage, the facilitation, the workshop content, workshop objectives, venue and timing. In terms of feedback on the session, participants rated all the elements across the workshop on average 4.4 out of 5.

Participants were particularly impressed by the ability to discuss a topic in detail and discuss fairness, equity and equality. Some comments are included below:

- *"Ability to be involved on decisions on the future of gas"*
- *"Interesting workshop - staff were excellent. Thought provoking. Thank you"*
- *"I liked that they seem to legit care about their customers"*

BATHURST

WHO DID WE SPEAK TO?

We spoke with participants reflective of the community of Bathurst and surrounds. The group included participants from surrounding communities such as Orange, Millthorpe, Windradyne, Wallerawang and Gormans Hill. Some also came from the newer estates in Kelso.

THEME

Thirst for knowledge

Participants really threw themselves into the topic area and had really insightful feedback and questions. As an indicator, they came up with many complex questions for the team to answer which ranged from use of blockchain to Jemena's approach to fairness (being an equity or equality model).

PRIORITIES - NOW

Participants were asked to rank seven priorities overall for Jemena now, as a table and were given ten gold coins to 'spend' against each of the priorities. This meant teams were forced to prioritise, and work together. Overall, teams prioritised price, reliability and fairness overall. There were a few variations; as you can see, one group said reliability overall and for another group fairness was at the top of the list overall. Two groups included safety as their second priority.

Priority - now	Table A	Table B	Table C	Table D	TOTALS
Price	**2**	**3**	**3**	**3**	**11**
Reliability	1	4	3	2	10
Fairness	3	1	1	1	6
Safety	1	0	2	2	5
Environment	2	1	0	1	4
Customer Service	1	1	0	1	3
Aesthetics	0	0	0	0	0
TOTALS	10	10	9	10	39

PRIORITIES - FUTURE

For Bathurst, the top future priority for participants was zero carbon energy for all of Australia.

Priority - future	A	B	C	D	Total
Zero Carbon energy for all of Australia	**3**	**4**	**3**	**4**	**14**
Individuals meeting their own energy needs	4	1	4	3	12
Reducing our need for energy (energy efficiency)	2	3	2	2	9
Reducing the cost of energy for all customers	1	2	1	1	5

FAIRNESS QUESTIONS – RESULTS

The reason we asked these questions was to ascertain customer perceptions and opinions about fairness. We framed these as questions around depreciation, capital expenditure, vulnerable customers and gas pressure across the network. These questions were completed as table discussions in groups of 4 to 6 people. Where possible, table scores were collated in response to each question from verbal feedback and summarised by the facilitator, who took the 'temperature' of the room. When this was not available, individual written comments and notes were categorised and analysed.

Q1: With uncertainty whether our pipes will actually be used beyond 2050, would it be fairer for current customers to pay more for new investments we make on the network relative to future customers?

Participants were able to achieve close to consensus across three tables in answer to this question, as majority responded yes, it would be fair. There were some other comments around transparency, communications on how the funds would be used. One participant mentioned that it may become more expensive for those left on the network. Some examples of the debate are included below:

- *"$7 acceptable compared to 3 times or more [that it] might be in future..."*
- *"I am happy to pay $7 per annum to recover the pipes and to start thinking about our future. For our next generation"*
- *"Any price increases to cover infrastructure costs would have to be minimal so as not to disadvantage low income earners and the struggling families"*
- *"The more people that leave the network, makes it more expensive for those left..."*

Q2: Would it be fairer for new customers to contribute to the cost of their connection, when in the past they haven't had to contribute?

After some deliberation and debate, most participants indicated that yes, this would be fair. Others indicated that no, this was not fair and the costs should be shared amongst all customers. Many attendees had a suggestion about how this could be implemented to reduce the impact on those joining the network. Some of these perspectives are included below:

- *"I strongly feel that land developers / new land home owners should contribute to new connections. I feel that this will help spare the lower income earners from sharing the burden of upfront cost."*
- *"All depends on what the future use of the network will be to allow cost recovery."*
- *"Customers should share the costs of the connection, connections should be free. This gives new customers incentive to sign-up"*

Q4: Is it fair that the pressure in the network is lower in some areas than others meaning some customers can't use modern gas appliances, specifically instantaneous hot water?

Participants discussed details of this question, and the majority agreed, that no, it wasn't fair, and we should assist low income earners who were most impacted on the network. Some felt this was a complex question that would require more education for those who were in low-pressure areas. A minority of people thought that yes, it was fair, as more users on the network were needed to justify the cost of an upgrade. A selection of the range of views from these categories are included below.

- *"If not a sub-standard service then expenditure is not justified…"*
- *"If the increase [was] kept minimal and the sustainable price so as to not disadvantage people on low incomes, pensioners etc might not be able to absorb any extra costs"*
- *"The only other option would be to offer people with lower pressure a discount might be appropriate - provided that the retailer passes the savings on…"*

FEEDBACK

At the end of each session, detailed feedback from participants was sought, via our anonymous feedback forms. Attendees rated all aspects of the workshops including opportunities to participate and engage, the facilitation, the workshop content, workshop objectives, venue and timing. Across the ratings for facilitation, participation, venue, objectives and timing, on average participants rated the session 4.9 out of 5.

Participants were particularly impressed by impressed by the venue, opportunities to have a say in an engaging way, and pleased with the facilitation. Some feedback is included below:

- *"The discussions were great, we all had different views and worked together…"*
- *"Looking forward to September to see some of the outcomes of our discussion"*

STUDY CIRCLE - OVER 55S / LOW INCOME EARNERS

WHO DID WE SPEAK TO?

We spoke to participants on Wednesday 6 and 13 June 2018. The majority of forum attendees were over 55, from a mix of western Sydney suburbs and housing types. There were a handful of participants in the group representative of new arrivals and low income earners, including Khmer, Gujarati, Tamil, Punjabi and Arabic. Several participants worked for non-government organisations that provide EAPA vouchers, such as Harris Park Community Centre.

THEMES

Discovery and education

Participants had the opportunity to discuss complex topics broken down into simplified concepts, and ask questions of the Jemena team in an informal and engaging way, learn about how to read their bills, and share their opinions with each other.

Budgeting

Many participants spoke about financial hardship in relation to themselves, friends and family and what is done in this space to support them. Some participants paid for elderly parents' electricity and gas bills. Two participants, new arrivals, indicated they change retailers every six months to find a better deal on their gas and electricity and this was part of their household budgeting strategy.

Fairness questions – results

The reason we asked these questions was to ascertain customer perceptions and opinions about fairness. We framed these as questions around depreciation, capital expenditure, vulnerable customers and gas pressure across the network. These questions were completed as table discussions in groups of 4 to 6 people. Where possible, table scores were collated in response to each question from verbal feedback and summarised by the facilitator, who took the 'temperature' of the room. When this was not available, individual written comments and notes were categorised and analysed.

Q1: With uncertainty whether our pipes will actually be used beyond 2050, would it be fairer for current customers to pay more for new investments we make on the network relative to future customers?

Almost all participants indicated yes - it would be fairer. Some of the other comments related to requiring more information, incentives, supply and monitoring, and communications or transparency around this. No participants indicated no to this question. Some examples of the feedback are:

- "*Pay more now to help out future generations*"
- "*Make it transparent*"

Q2: Would it be fairer for new customers to contribute to the cost of their connection, when in the past they haven't had to contribute?

After some discussion, majority of participants agreed that Jemena should charge for a new connection. Others indicated the cost could be recouped over time. One indicated it was a large upfront cost that could be difficult for some.

- "*Many countries charge for a new connection everywhere*"
- "*Pay some upfront or recover all*"

Q3: Is it fair that everyone pays a little more to help fund programs led by Jemena to assist vulnerable gas customers? *

(*Note: Q3 vulnerable customers question asked in Griffith, Goulburn, Study Circles and Western Sydney)

In response to this question participants gave a unanimous yes that vulnerable customers should be assisted. A few participants were involved in the EAPA scheme delivered by their employers; non-government organisations. Participants were also clear that there should be some rules to avoid people taking advantage of the system. Some of these comments are below:

- "*Increase capacity, allow organisations to have more help*"
- "*Wonderful scheme - I wouldn't mind paying $1 towards it*
- "*It would still need to be means tested*"

Q4: Is it fair that the pressure in the network is lower in some areas than others meaning some customers can't use modern gas appliances, specifically instantaneous hot water?

Forum attendees believed this was a complex question and there was need for more education, information and transparency around this topic. After discussion, many agreed that no, it was not fair. There were a couple of comments around communications to those on the lower pressure areas. There was also a view that it was only fair that everyone was supplied with basic necessities, if gas is a necessity. Some of the comments are included below:

- *"Reasonable – how much for it to go up?"*
- "*Upgrade, but if not, it should be cheaper…Gas is an essential service*"
- "*Need for transparency*"
- "*[I] want an idea of the costs around it*"

Feedback

At the end of each session, detailed feedback from participants was sought, via our anonymous feedback forms. Attendees rated all aspects of the workshops including opportunities to participate and engage, the facilitation, the workshop content, workshop objectives, venue and timing. Across the scores, participants rated all the elements of the workshop an average 4.5 out of 5.

Participants were complimentary about most aspects of the workshop but were particularly impressed by the facilitation. Some of the feedback and quotes from participants was as follows:

- *"Learning new things"*
- *"Different views and expressing my view"*

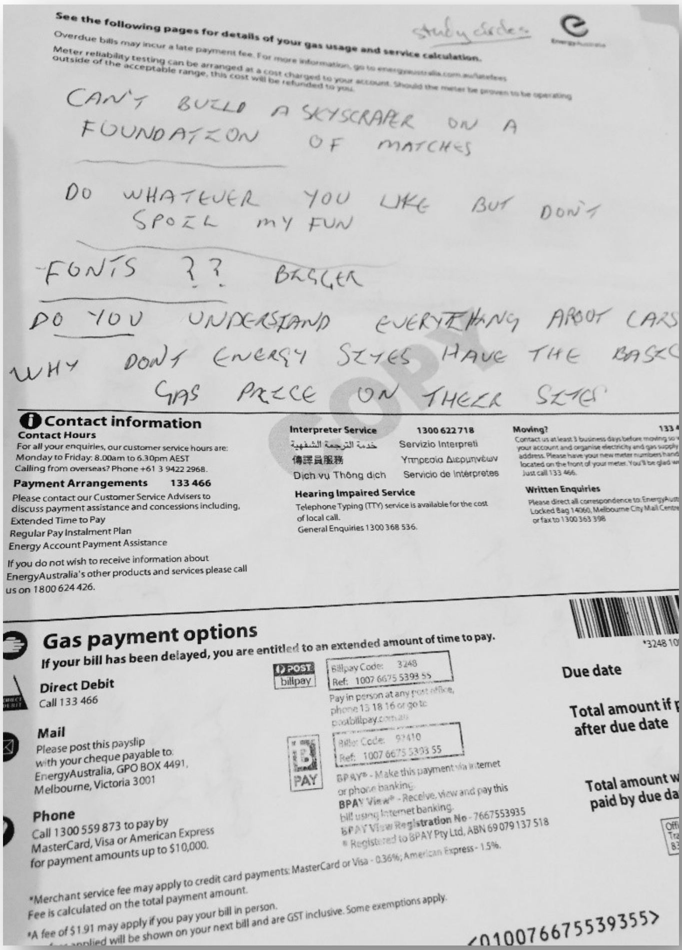


Figure 2 (right): Participant feedback hand written on their own bill, pertaining to the font size on the Bpay payment options, which was raised in the study circle by participants.

NEXT STEPS

When Straight Talk reviewed the long list of questions that Jemena wanted to ask for the next stage, we found that most of them have been asked, in some form, in the early sessions. What remains now is to build on the expertise and understanding within the existing groups so they can explore, in greater depth, key issues.

Based on our conversations with customers, we see the next steps are around having more in-depth conversations with customers relating to:

- Preferences and/or priorities relating to decisions that will directly influence customer bills
- Price path – allowing the customer to have a say in their preferred path from 2-3 options
- Maintenance
- Network upgrades/improvements
- Vulnerable customers
- Deferrals (just in time approach)
- Cost recovery (connections, disconnections and reconnections)
- Price differentials/service differentials between city and regions
- Information/education options to help customers manage their energy usage/reduce their bills
- Meter readings/estimations

Customers have already told us, quite clearly, that in order to provide in-depth feedback they need to know what the impact of their decisions will have on the bill – individually, by item or option, but also cumulatively, so they can then decide on the priority and subsequent costs.

A 'building block' pricing module is suggested – i.e., a $1million vulnerable customers program would cost approximately 50 cents per year for each customer; while this on its own is acceptable as it is relatively low, what would customers accept if their choices were:

- $7 a year to improve pressure across the network
- $15 a year to ensure reliability of service through upgrades
- $5 a year to 'future proof' the system against hacking and terrorist attacks
- a total increase of $28.50 a year, per customer.

Some of these activities could be demonstrated through 'building blocks' – colour-coded laminated blocks that each small group and/or the whole group could arrange in terms of the optimum outcomes for customers, with the least amount of cost? They could also be demonstrated through mock up bills or other activities relating to have customers thinking though future outcomes.

This is the basis for our work with Jemena so far, and the next steps to take to build on this deliberative forum consultation methodology.

We have taken this work forward to frame the forum three content, objectives and intended outcomes. We look forward to working on the next stage of this project in close contact with the Jemena team.

19 DECEMBER 2018

Jemena Large Customers Forum – Combined Results

Consultation Report

Document status

Version	Purpose of document	Authored by	Reviewed by	Review date
v 1.00	First version of report	M Spencer	R Fox	12/12/2018
v 3.00	Second version incorporating feedback	M Spencer	M Armstrong	17/12/2018

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RPS

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Executive Summary

Why this engagement?

Over the past 18 months, RPS Straight Talk has been supporting Jemena, to conduct large-scale engagement with household, small business and CALD customers to inform its Revenue Proposal to the Australian Energy Regulator (AER). We have engaged with 333 people over 154 hours across 58 individual sessions. Whilst this has resulted in rich data and key findings around residential customer views, we identified an opportunity to jointly engage, and consult on the collective views of large customers. This forum supplements our considerable one-on-one engagement already undertaken with large customers. Furthermore, at a session held in October, Jemena's Customer Council identified a strong need to engage with large customers as part of its submission of the Revenue Proposal to the Australian Energy Regulator.

It was evident from the beginning of this process, that the large customer group has broadly different needs to residential customers and are more skilled in their understanding of the energy market. Therefore, it was agreed that a different approach would be crafted as compared to the deliberative forums with household customers. Although Jemena was seeking feedback on similar issues - the price path, the energy trilemma, fairness, and hydrogen -the consultation structure was somewhat modified. This allowed us to more accurately represent the views of large customers and structure a consultation environment and questions that would solicit the most authentic responses.

In a proactive response, Jemena and RPS Straight Talk facilitated a feedback session at a recent forum held in Sydney on the 30 November 2018. This sought thoughts, feedback, opportunities and challenges from 37 representatives of Jemena's large demand customer base.

Report structure

This report provides:

- an overview of engagement process
- the key themes raised by customers
- a matrix of key issues.

The appendices provide a detailed analysis of the responses, the participant feedback about the forum, and a list of companies represented in this engagement process.

Overview of engagement

On 30 November 2018, Jemena hosted a four-hour working lunch with 37 large customer representatives at the Four Seasons Hotel Sydney.

RPS Straight Talk prepared and facilitated a core 45-minute session at the lunch which posed questions around the energy trilemma, fairness and the price path. Later in the forum, immediately following presentations on these topic areas, RPS Straight Talk focused on posing key questions, encouraging plenary discussion and written feedback on hydrogen, and the NSW 2050 vision. Because of the audience's need to ensure business and commercial matters remained confidential, we focused on producing a written feedback booklet with six topic areas and up to five questions in each topic area.

The written booklets allowed those who were not comfortable speaking verbally – or with the competition – about their opinions on the topics at hand. At this session, the Jemena team members were present at each table, one to take notes and the other to ask questions. This encouraged participants to openly discuss at their tables and provide feedback in a plenary session. At the end of the forum, we sought feedback from participants, to work towards continuously improving future consultation with the sector.

Key insights:

EMERGING VALUES

Affordability and reliability are most important from 2020-25 across both large users and retailers, with large users expressing a secondary preference for environment and reliability.

Environment is an emerging theme from 2025 onwards for large users, and affordability and reliability is still a strong theme for retailers going forward.

GAINING TRUST

5 in 10 participants surveyed agree they trust Jemena more than before because of this forum. They expressed appreciation for the communication, engagement and opportunity to share ideas in a respectful environment.

PRICE PATH

Around three quarters of large users, and three quarters of retailers, expressed a preference for spreading price recovery of costs equally across the five-year period. Across these two groups, there is a strong preference towards minimal fluctuations to better manage costs.

ENERGY LEADERSHIP

Many large users indicated they are already implementing efficiency measures or utilising alternative energy. They understand government policy plays a role and are looking to Jemena to provide leadership in the research and technology space for a carbon neutral 2050, inclusive of low-cost hydrogen solutions.

Retailers indicated they are responding to the targets of investing in renewables, however some felt their role is limited

Matrix of key issues raised by topic area

The Energy Trilemma	Fairness	Price Path	Price Impacts	Hydrogen	NSW 2050 Vision
• Affordability and reliability are a priority for 2020-2025 • Environment and affordability, is a priority from 2025 onwards.	• Balancing the need of large demand customers is a priority for the next five years • Balancing the need of small business is a priority from 2025 onwards • Believe fairness is a priority for the medium-term • Believe planning for the network is a priority for the medium-term.	**Result from large users:** • 77% of large users indicated they were comfortable with recovering an equal amount every year • 23% of large users indicated they wanted to recover less in the earlier years, but more in the later years. **Result from retailers:** • 75% of retailers indicated they were comfortable with an equal amount every year • 25% of retailers wanted to recover less in early years, but more in later years.	Large customers would adjust through the following mechanisms: • If network charges increase by 5%, large business would investigate alternative energy sources or charge customers more. • If network prices went down by 5%, participants would invest in new production techniques or assets for the business.	Top feedback around hydrogen (in order of priority): • Want government policy to assist with the transition to hydrogen. • Concerns that hydrogen is still an expensive process and needs to be made viable for use at large scale. • Most believe Jemena should be proactive in investing in this technology.	Large customers would only support Jemena implementing changes that cause a network price increase between 2020 and 2025 if: • There was a reduction in overall costs • Gas supply and reliability improved • If total network price was reduced. A proportion or large users indicated they would never support the changes In terms of retailers: • 75% indicated they would only support this if the Australian Energy Regulator Supported it • 25% indicated they would never support the changes.

Figure 1: Matrix of key issues raised by category in detail

Appendix A

Detailed Results Analysis

Question 1: The Energy Trilemma

Participants were asked to mark where they believed Jemena should be balancing affordability, reliability and the environment by colouring in one box on each of the triangles.

LARGE USERS COMPARED WITH RETAILERS

Concerning 2020-2025

Between 2020 and 2025, most large users feel the focus should be on affordability, followed closely by environment and reliability (probably as an equal mix of the two). This is represented by the heat map on the left. In terms of retailers, between 2020 and 2025, all felt the focus should be on affordability, as you can see the heat map on the right.

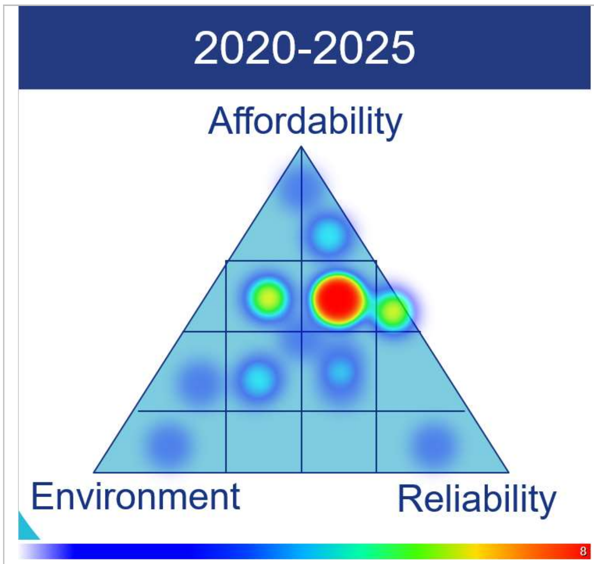

Figure 2: Heat Map produced that details where **large users** believe Jemena should focus for 2020-2025

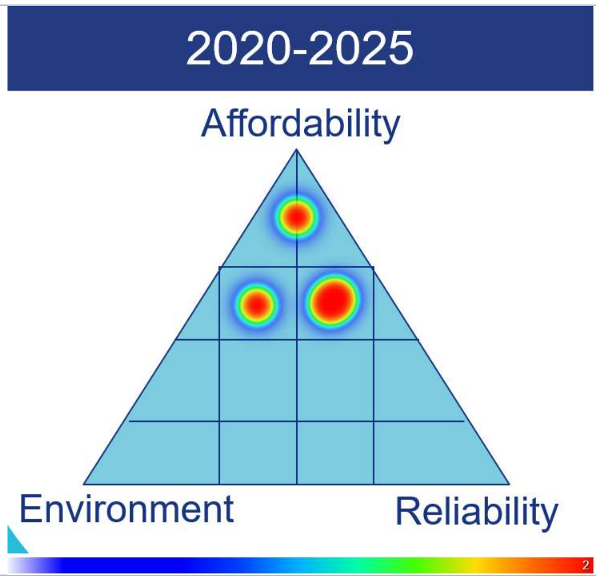

Figure 3: Heat Map produced that details where **retailers** believe Jemena should focus for 2020-2025

Indicative large user comment

- *"Although reliability is assumed so therefore the client wants affordability - those making purchase decisions often only looking at numbers."*

Indicative retailer comment:

- *"Affordability would be the focus for most businesses in the country"*

Concerning 2025 and beyond

LARGE USERS

For 2025 and beyond, there is still a strong preference to keep affordability for large users. This is demonstrated by Figure 4 heat map. However, many also believe environment and reliability to be a priority for this period, as demonstrated by the heat map (left). Readers will notice this is contrasted by the desires of retailers (right). As demonstrated by the heat map, retailers are still focused on affordability, with an additional preference towards environment and reliability.

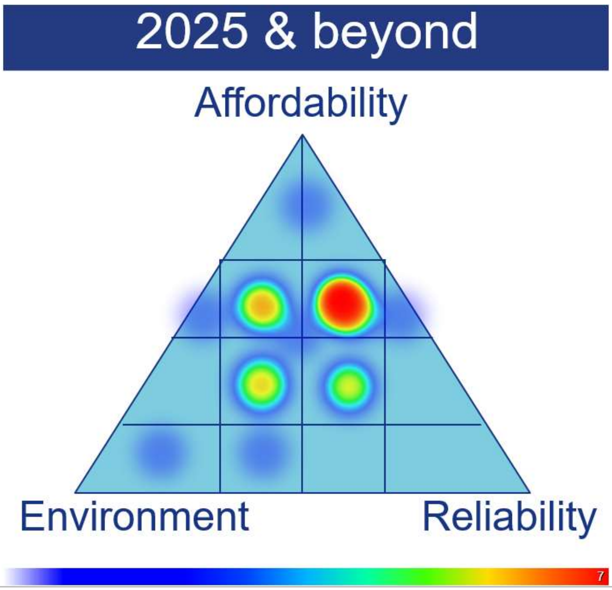	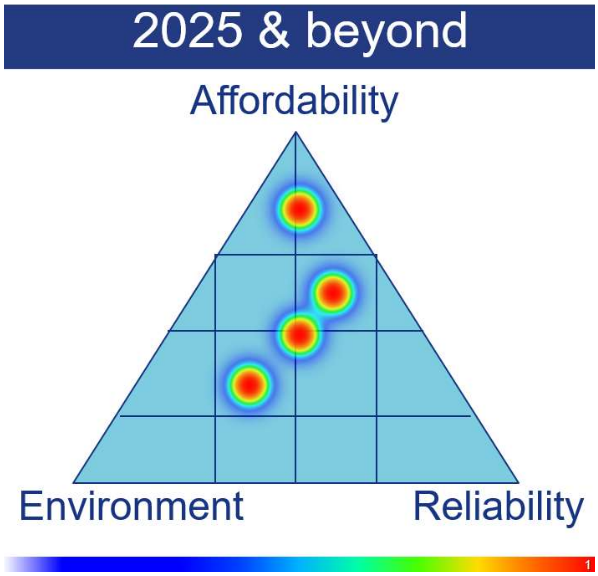
Figure 4: Large users heat map detailing where they believe Jemena should focus for 2025 and beyond	Figure 5: Retailers heat map, detailing where they believe Jemena should focus for 2025 and beyond

Large user comments:

- *"Affordability and reliability are the two biggest concerns we have as a business. Environment is a long-term goal."*
- *"As a supplier of patient services reliability and affordability are key. However environmental impact is also a key future consideration."*

Retailer comments include:

- *"Environment will be delivered through new generation and green alternatives".*
- *"Affordability is an urgent need to be attended".*

Other comments

LARGE USERS

Many large users felt the provision of services in the next five years should focus on affordability as the most pressing need for business and look to the future for addressing environmental concerns.

Like household customers, some thought that reliability is a 'given'. Others believed that, for their business (for example, health care) reliability was a non-negotiable. A couple of participants thought that it was not the distributors' role to focus on environment. There were some participants who emphasised the importance of keeping manufacturing alive in Australia through keeping it competitive. Representative comments from this activity are included below as a wordle. The bigger and darker the word, more frequently it was mentioned.

Figure 6: Wordle of large users received in response to this topic area.

RETAILERS

Retailers are focused on the customer needs as the first priority, and this reflects which includes affordability, followed by price and reliability. The provision of data services and information to customers (including data billing and maximum daily quantity) was important.

Figure 7: Wordle of retailer comments received in response to this topic area.

Question 2: Fairness

LARGE USERS

Affordability – short term, medium term and long term

In terms of how Jemena should respond to affordability in the short, medium or long term, ‘medium term’, nearly five in ten indicated ‘medium term’, followed by four in ten ‘short term’

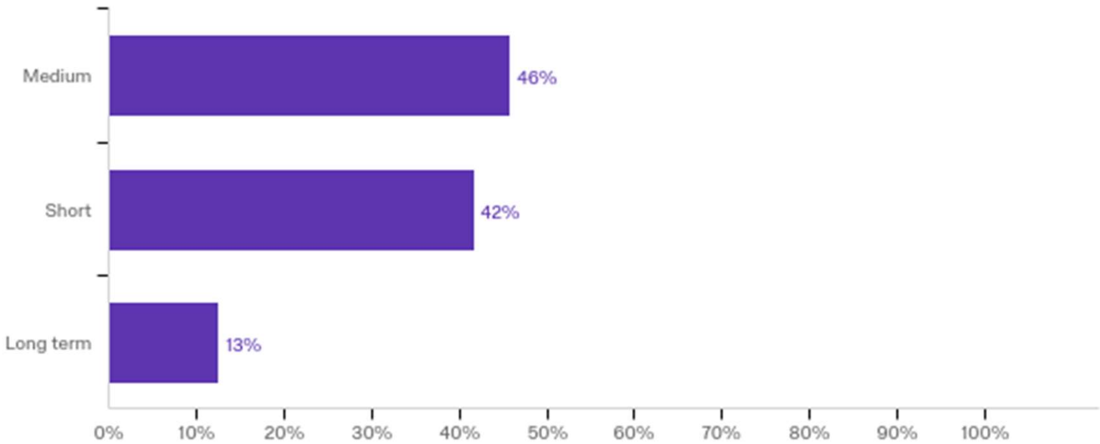

Figure 8: Large users responses ranking affordability for the short, medium or long term. Participants could only indicate one response to this question.

RETAILERS

In terms of retailers, for affordability, 50% are focused on the long term. This is followed by short and medium term (25%).

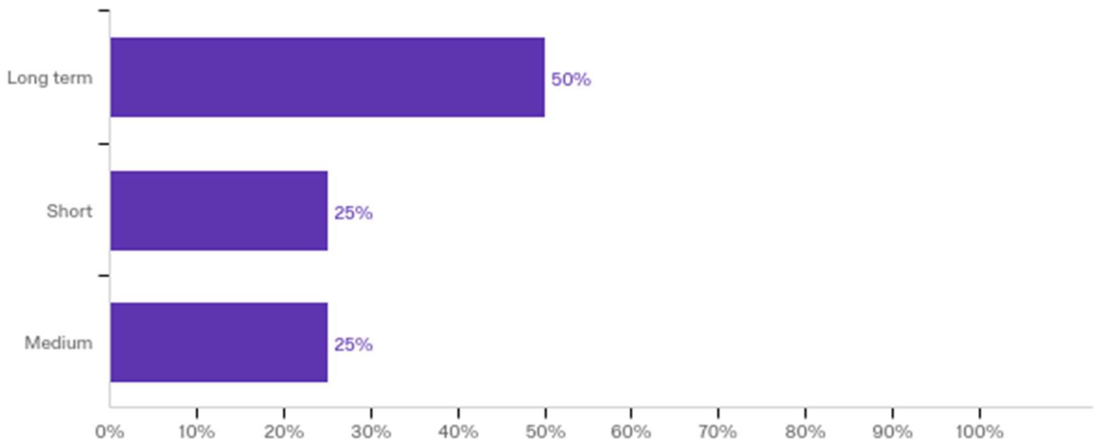

Figure 9: Retailers focused on the long term at 50%. Participants could only indicate one response to this question.

Planning the network – short term, medium term and long term

LARGE USERS

Five in ten large users indicated Jemena should address planning the network in the medium-term. Four in ten ten indicated long term. Participants could only indicate one response to this question.

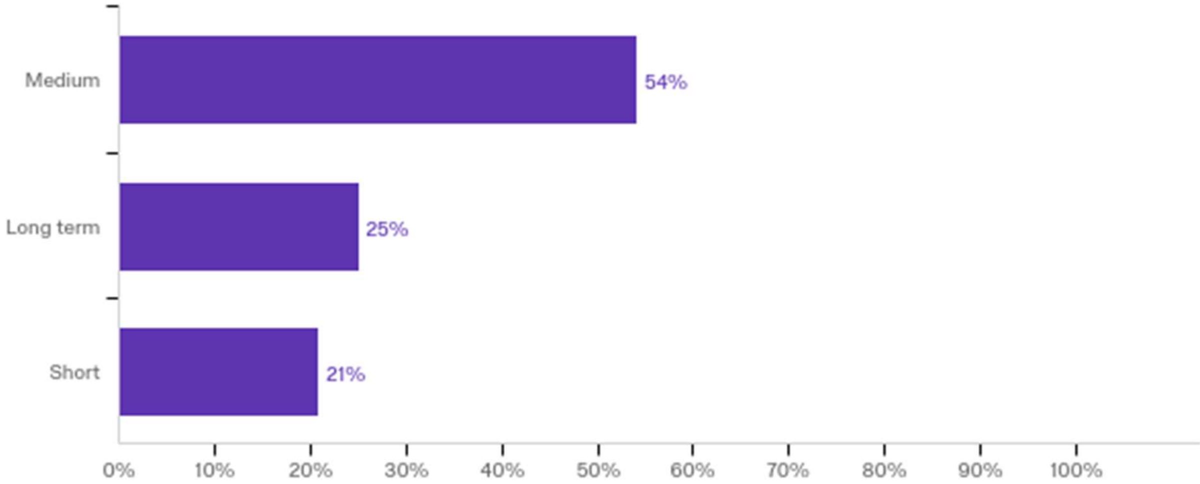

Figure 10: large users responses ranking planning the network for the short, medium or long term. Participants could only indicate one response to this question.

RETAILERS

In terms of planning the network, in contrast to large users, 75% of retailers indicated Jemena should focus on the long-term. 25% indicated medium term.

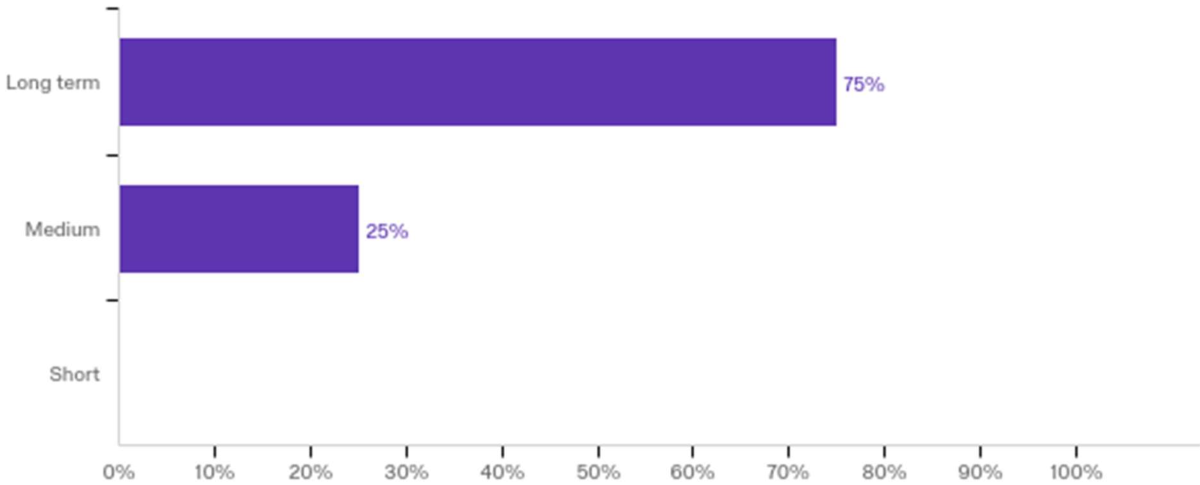

Figure 11: retailers responses ranking planning the network for the short, medium or long term. Participants could only indicate one response to this question. Note low base.

Balancing customers – 2020 – 2025

LARGE USERS

During this activity, we asked participants to mark in a triangle where Jemena should balance the need of residential, small business and large customers for 2020-2025. As demonstrated by the resulting heat map below, large users were in favour of meeting the needs of large demand customers during this period. Reasons given included:

- *"Immediate priority for where the pain is felt most and where people are employed"*
- *"Large users substantially underwrite the cost of operating the network. if large users shut down, those costs will need to be recovered from smaller users."*

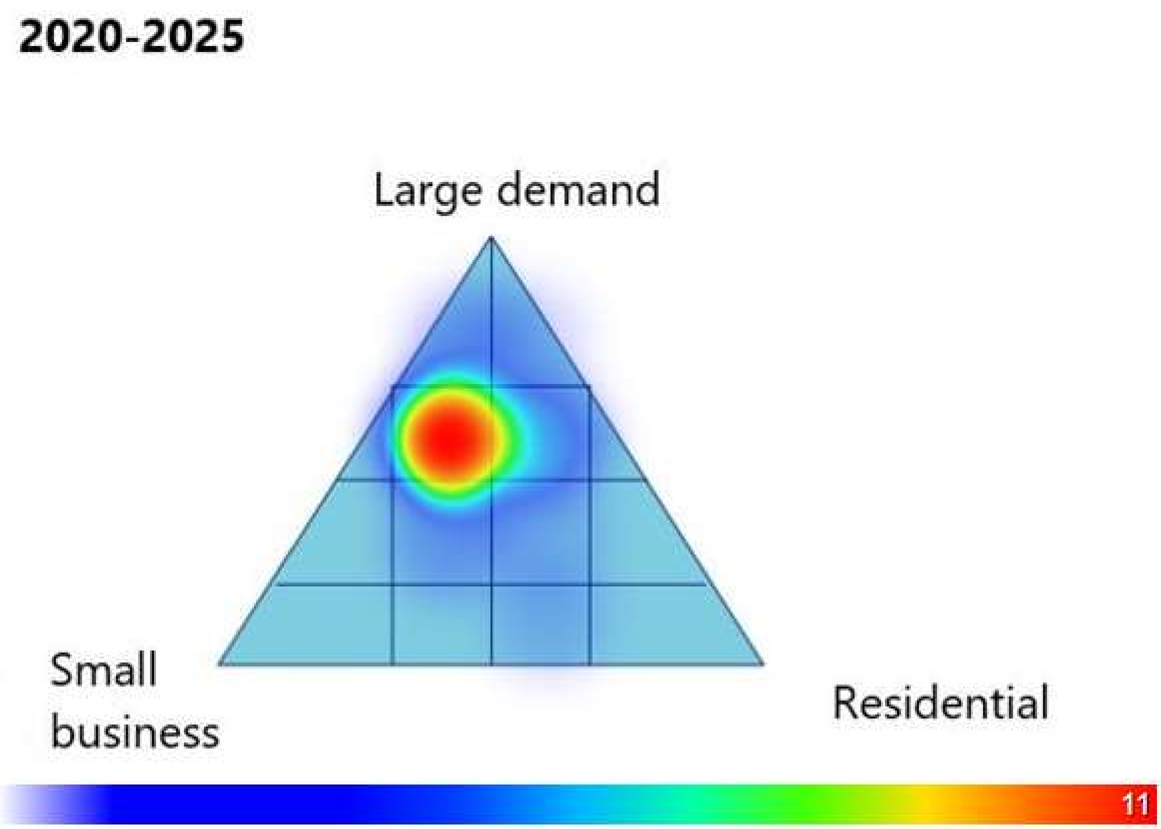

Figure 12: Heat map results in terms of the 2020-2025-time period (large users)

RETAILERS

As demonstrated by the resulting heat map on the next page, retailers are in favour of meeting the needs of large demand customers during this period, followed by small business and residential. Reasons given included:

- *"Immediate priority for where the pain is felt most and where people are employed, later residential, large customers."*

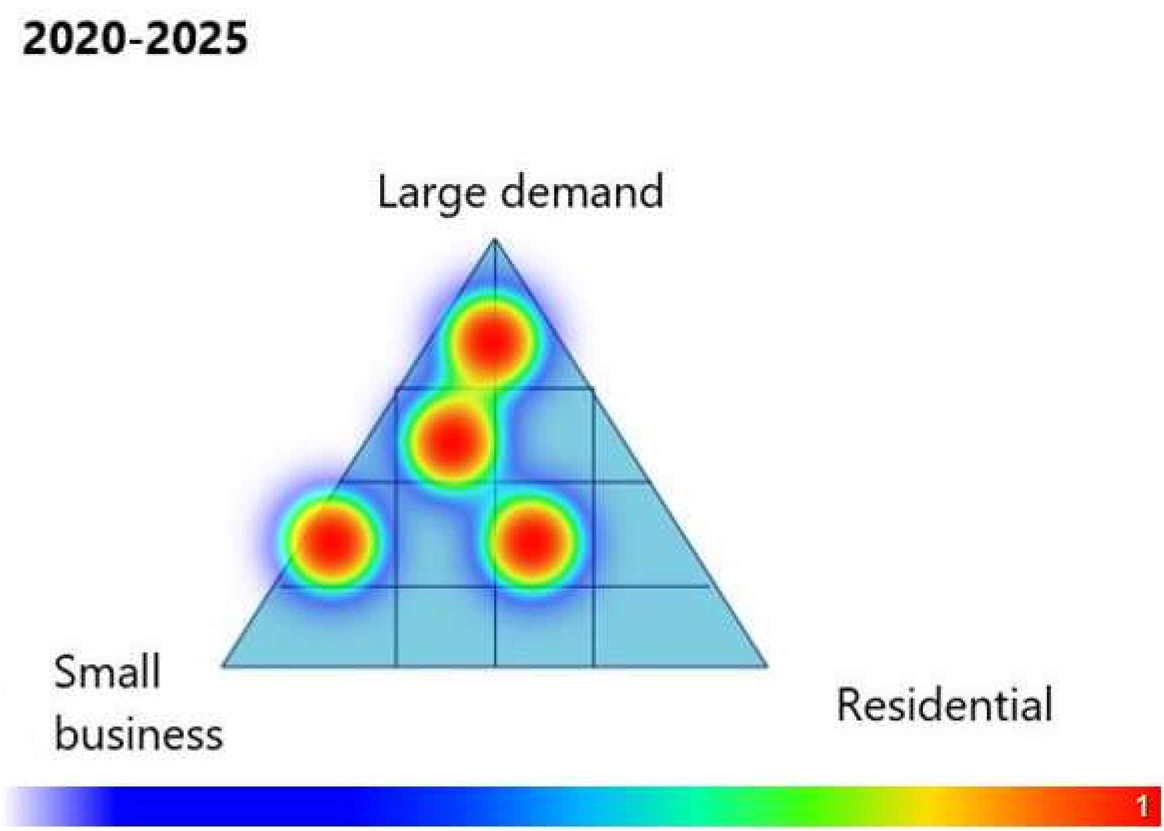

Figure 13: Heat map results in terms of the 2020-2025-time period (retailers)

2025 and beyond

LARGE USERS COMPARED WITH RETAILERS

During this activity, we asked participants to mark in a triangle where Jemena should balance the need of residential, small business and large customers for 2025 and beyond. As for the outcome for large users, there was more of a shift towards small business in the results, although large users still feature heavily.

The result for retailers is slightly different; they believe Jemena should balance the needs of residential and small business customers in 2025 and beyond.

This is demonstrated by the heat maps side by side of results from both segments on the next page.

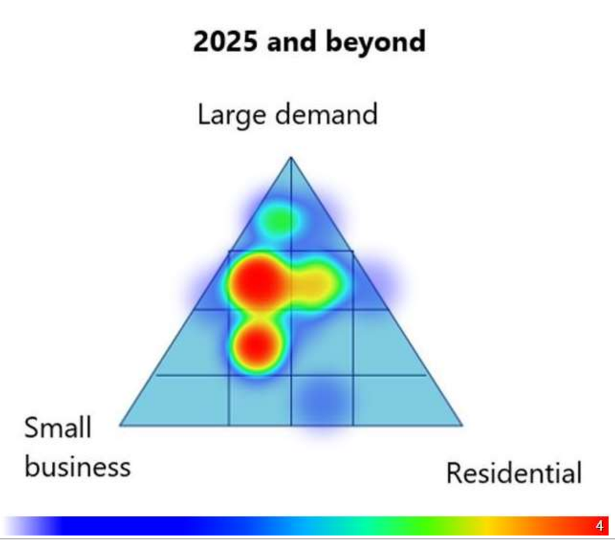

Figure 14: Heat map results in terms of 2025 and beyond favours small business and large demand customers (large users).

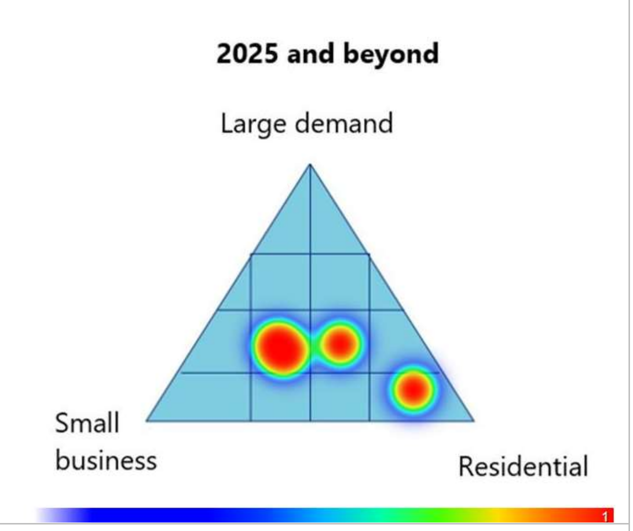

Figure 15: Heat map results in terms of 2025 and beyond favours residential and small business customers (retailers).

Some of the reasons given by large users included:

- *"I believe the future will be more sustainable with a focus on smaller community scaled business and higher density residential populations. The direction will clearly be towards de-carbonisation of the network as the alternative cost of electrification will be too high."*
- *"We need business both large and small but also residential needs must also be part of that mix."*
- *"Business drives the economy not residential. Small and large will employ if they don't jobs disappear. Residential can always find alternative sources."*

Reasons given by retailers included:

- *"Immediate priority for where the pain is felt most and where people are employed, later residential, large customers."*

Question 3: The Price Path

For our 2020-25 plan, we need to take a view on the timing for recovering our costs over the 5-year period. We asked for views on two broad options:

- Recover an equal amount each year
- Recover less in early years, but more in later years

LARGE USERS

Around 75% of large users indicated they were comfortable with recovering an equal amount every year, with 25% indicating they wanted to recover less in the earlier years, but more in the later years. The table indicates this below.

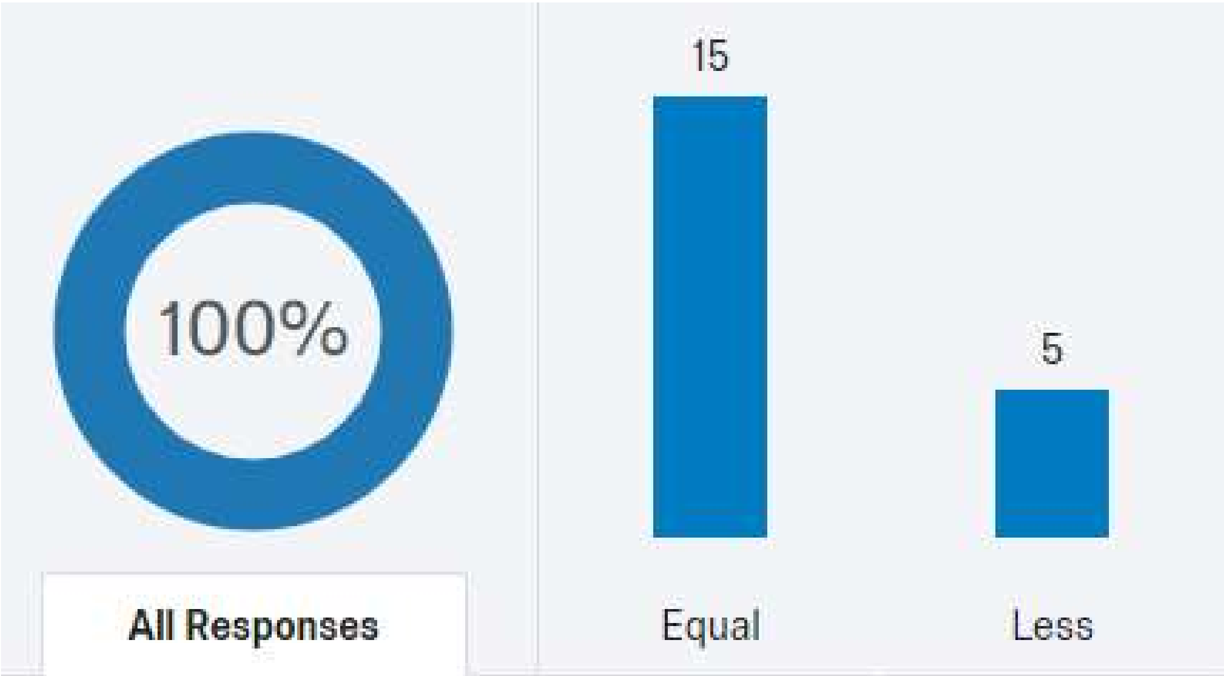

Figure 16: those large users who indicated equal, versus less option for the price path response. Please note this is shown in count, not percent, due to low numbers.

Reasons given by large users for Equal amount each year included:

- *"Recover an equal amount each year. First option is preferable - steady state is easier to work with when forward planning."*
- *"Preference to long term pricing consistency rather than significant variability in either direction"*
- *"Ideally we would have a preference to have a stable price path. Throughout charges and ease to flow-on and to interpret impact on the retailer, and how it ensures transportation costs are managed, within pricing points to end consumers."*
- *"Recover an equal amount each year. Otherwise you're accumulating a future problem. Recovering more in later years is a recipe for disaster."*

Reasons given by large users for less in the early years included:

- *Recover of less in earlier years will relieve total cost pressure on users while gas prices remain high."*

RETAILERS

Similar to large users, 75% of retailers indicated they were comfortable with recovering an equal amount every year, with 25% indicating they wanted to recover less in the earlier years, but more in the later years.

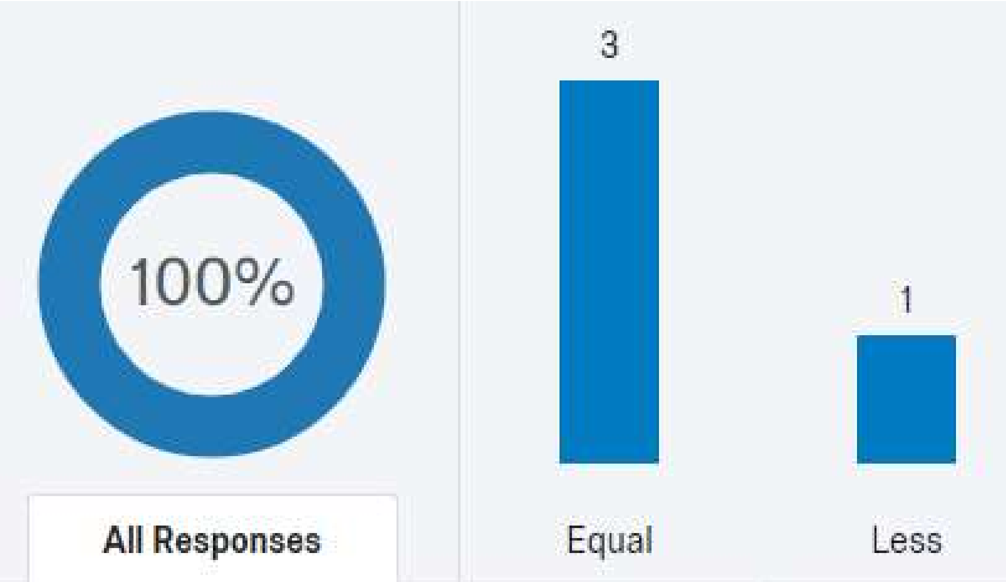

Figure 17: retailers responses to the Price Path question. Please note this is shown in count, not percent, due to low numbers. Caution low base.

Indicative comments from retailers are below:

- *"Equal – certainty, and no unexpected 'balloon' payments"*
- *"Recover less in early years, but more in later years The gas shortage has resulted in high prices. The renewable energies will ease the situation in the mid-term timing. We need to keep the cost lower in the short-term."*

Question 4: Price Impacts

LARGE USERS

Business response if network charges increased by 5%

Figure 18 (page 18) shows the responses from participants to the question of how they would respond to a 5% increase in price. The top response was to investigate alternative energy sources, followed by charging customers more, and then revising their gas processes. Also included on the following pages are the sample responses in each of the categories.

Indicative feedback from large users for each of these top categories is below:

- *"Continue working on alternative energy source to replace gas at accelerated rate. And work on energy reduction projects, reduce spending on other more valuable work for us.:*
- *"There would be no impact on productivity. We would be looking at implementing gas reduction projects to reduce our spend."*

RETAILERS

Business response if network charges increased by 5%

Figure 19 (page 18) shows the contrast between the retailer response to this question around how they would respond if the charges increased by 5%, as compared to the large users. The top response was to charge customers, followed equally by close of businesses, negative growth, no impact, and a comment about customers feeling price shock.

Example comments from retailers included:

- *"As a retailer we pass through, however, this may mean less sales as businesses use less or close to avoid the cost."*

Impact if network prices went down by 5%

LARGE USERS

Figure 20 (page 19) shows the responses from large users to the question of how they would respond to a 5% decrease in price. The top response was to increase investment in the production of new assets for the business, followed by increasing margins, and increased savings for customers. A minority of participants indicated this would not have an impact at all.

Example comments from large users:

- *"With prices coming down we might be able to redirect those funds into improving our manufacturing process to our customers benefit."*
- *"Joy! Improve our margin."*
- *"5% will not affect growth / expansion plans."*

RETAILERS

Figure 21 (page 19) shows the retailers response in contrast with the large users to this question around how they would respond if the charges decreased by 5%. Retailers responses were fairly equal between themes – split between increased margin, savings for customers and no impact.

Example comments from retailers:

- *"N/A."*
- *"Broad experience is reaction is neutral, not a large impact."*

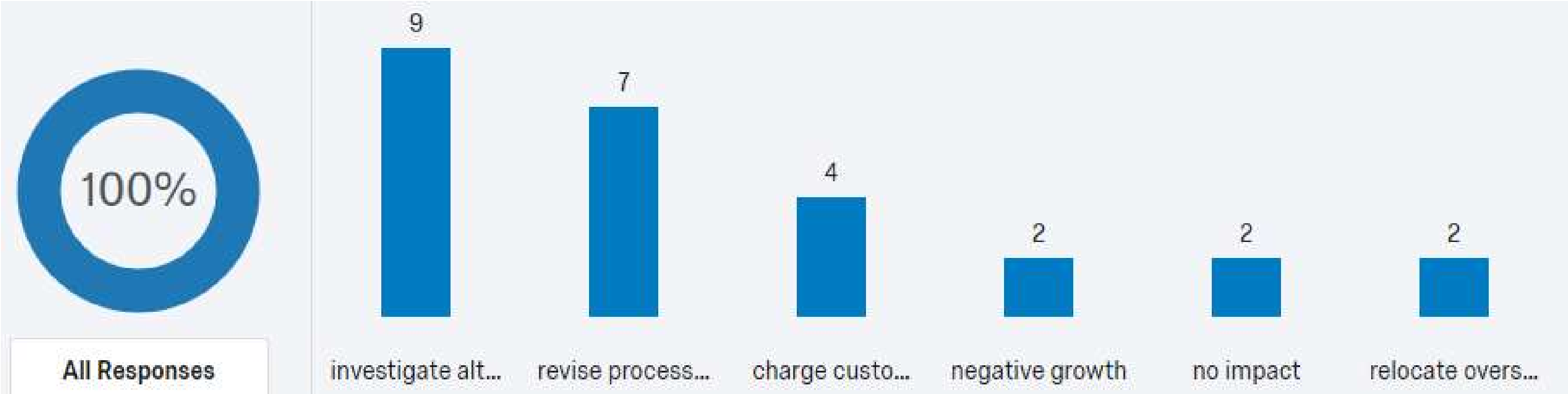

Figure 18: Top responses by category from **large users**, if network charges increased by 5%. Please note this is included as count not percent due to low numbers.

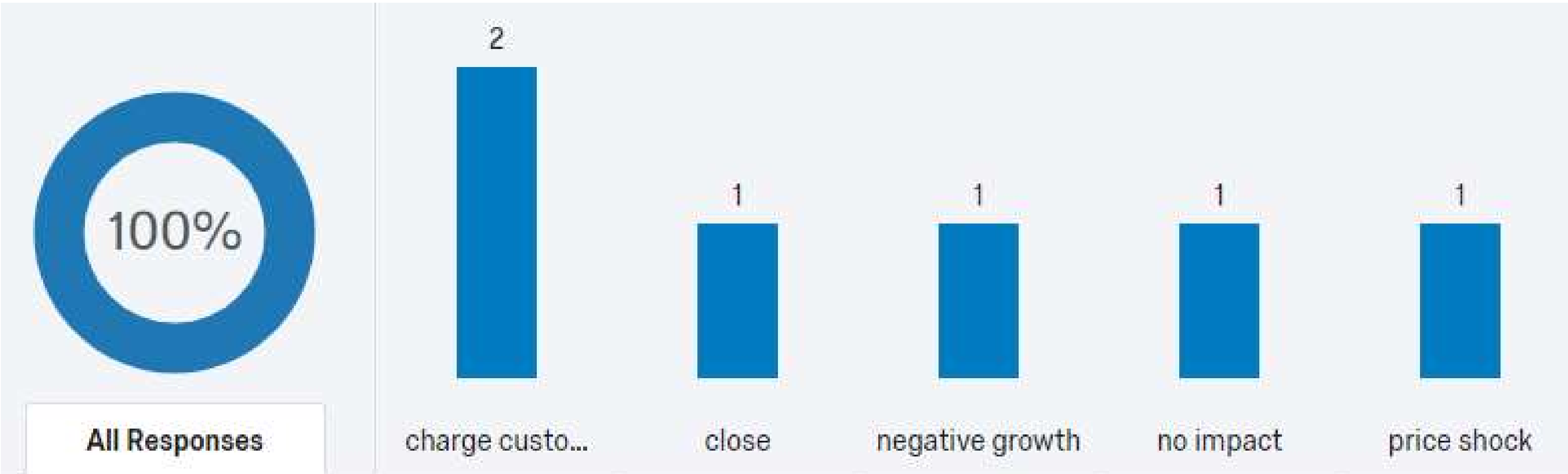

Figure 19: Top responses by category from **retailers** if network charges increased by 5%. Caution low base.

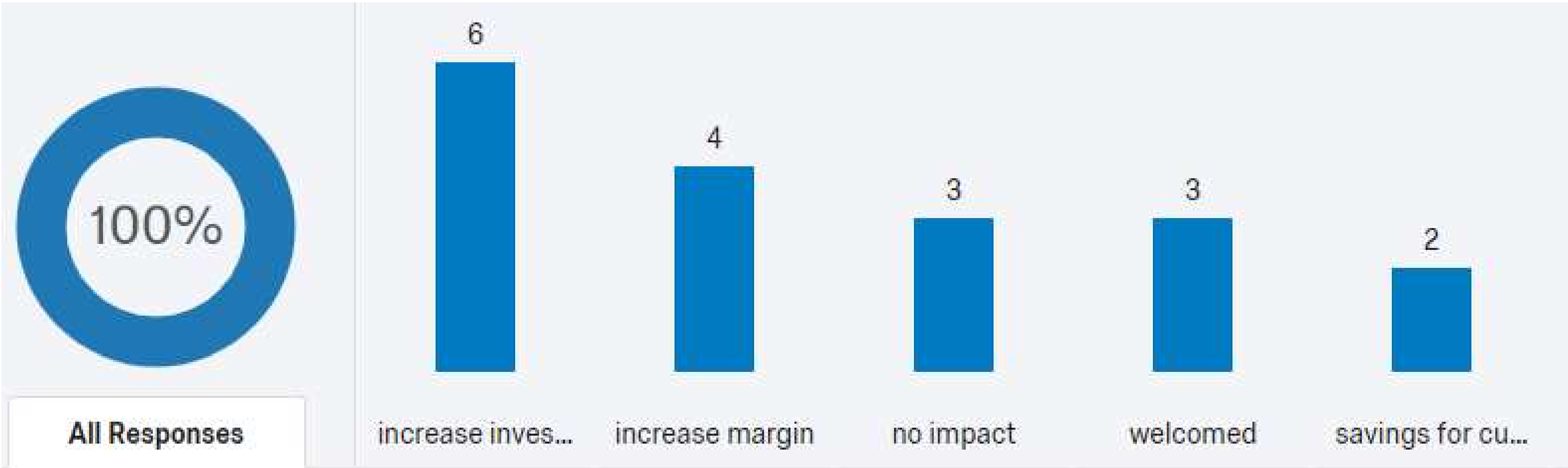

Figure 20: Top responses by category from **large users** on what the impact would be if network prices went down by 5%. Please note this is included as count, not percent, due to low numbers.

Figure 21: Top responses by category **from retailers** on what would the impact be if network prices went down by 5%. Please note this is included as count, not percent, due to low numbers. Caution low base.

Has your business triggered / or made any of these changes in the past in response to changes in your gas network price?

LARGE USERS

Responses from large users to this question were more mixed. The most popular response had been to introduce energy efficiencies; followed by introducing production efficiencies and an overall 'yes', followed by. production efficiencies.

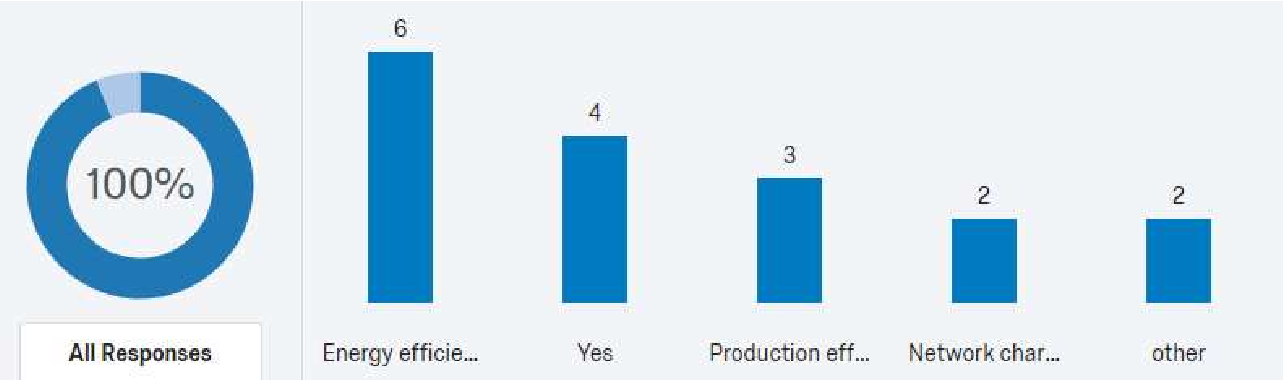

Figure 22: Large users top responses by category around changes made in response to network prices. Please note this is included as count, not percent, due to low numbers.

Some of these responses from large users included:

- *"Actions to install energy efficient plant and improved maintenance routines."*
- *"Work done to reduce demand charges. Clearly it has been the substantial movement in gas price that has driven changes in recent years. But network charges still remain a substantial component of total delivered cost."*

RETAILERS

Responses from retailers were less specific. Some indicated there was no impact, and the other indicated it was not applicable to them.

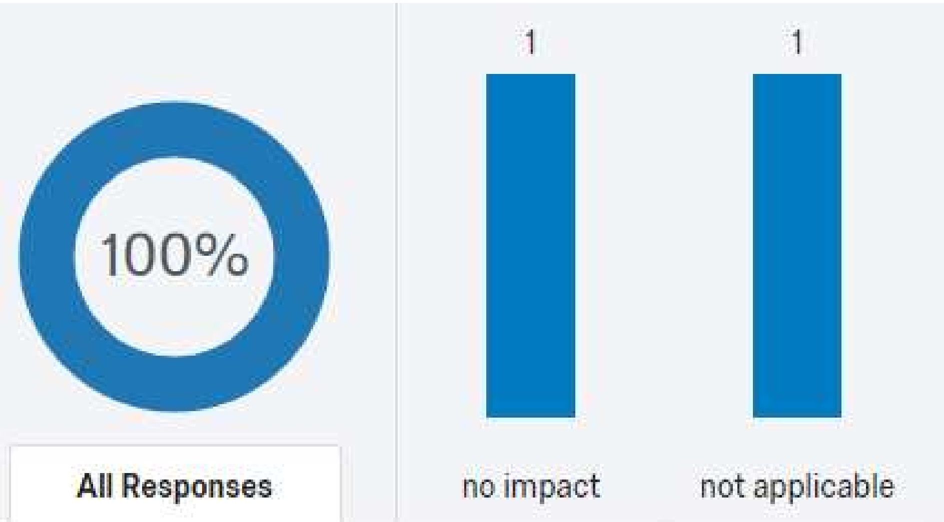

Figure 23: Retailers top response by category around changes made in in response to network prices. Please note this is included as count, not percent, due to low numbers. Caution low base.

Some of these responses from retailers included:

- *"N/A"*
- *"N/A – broad experience is reaction is neutral, not a large impact."*

Question 5: Hydrogen and the 2050 Vision

This question asked participants how their organisations were responding to the NSW Government target to achieve zero carbon emissions by 2050, and for their views on hydrogen technology and innovation.

Is your business responding to this target, and in what ways?

LARGE USERS

Top responses from large users included investing in or exploring renewables or alternatives, investing in more efficiencies, and looking for savings across the business. One indicated they were not responding. This is demonstrated by the text analysis completed through the analysis of written responses below – Figure 14.

Figure 24: Different ways that large users describe their response to the NSW 2050 Vision.

Example responses from large users include:

- *"Solar power purchase agreements (PPAs) more popular than ever." [Large Users Consultant]*
- *"[our business name omitted] have carbon reduction targets. For example, we want to reduce energy intensities (gas and electricity per unit output) by 10% in 2 years and 30% in 5 years by reduction projects and better work practices. We have introduced a gas engine 1.5 MW to burn bio gas from our water treatment plant and offset gas usage by heating up our boiler feed water."*
- *"Clients are concentrating on the commercial reality first – so the projects that can save $$ as well as move them to 2050 goal!"*

RETAILERS

Top responses from retailers included investing in renewables, although some acknowledged their role was limited. A minority of participants indicated this was not applicable to them or that they were not undertaking any activity. This is demonstrated by the text analysis completed of written responses below – Figure 15.

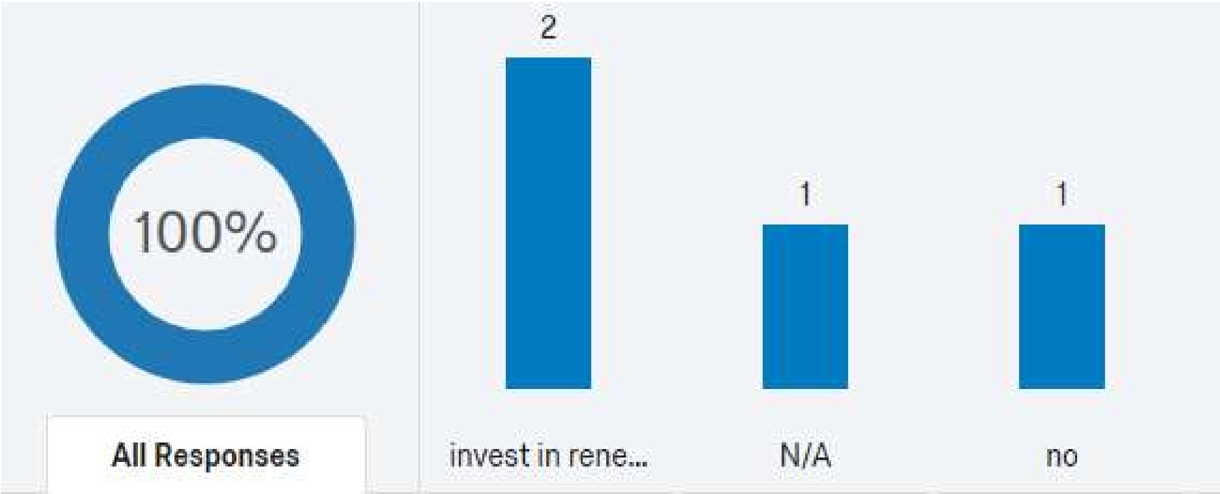

Figure 25: Different ways that retailers describe their response to the NSW 2050 Vision. Caution low base.

Example responses include:

- *"Limited role to play as retailer only Some role in assisting end users access 'green' gas if they wish"*
- *"Yes to solar / wind"*
- *"Unless we adopt nuclear or new hydro, I think these targets are enormously optimistic and a little silly."*

Transitioning to Hydrogen

We asked participants whether they thought Jemena should be proactively investing in a transition to Hydrogen. We also asked whether they thought government policy needed to lead the way, and whether participants thought the target was unachievable or not relevant.

LARGE USERS

In terms of large user responses, participants were most concerned about how government policy would assist with the transition to hydrogen. Many also indicated that hydrogen production was still an expensive process, and that costs would need to come down significantly to make it viable for businesses to use at a large scale. Many also indicated that yes, Jemena should be proactive in investing hydrogen technology. These results are demonstrated by figure 15 on the next page – comparative with the retailers responses, that is summarised below.

Some indicative responses from large users include:

- *"Hope it is achievable, Jemena being proactive is a great thing. Governments need to be developing policy …."*
- *"Technically hydrogen is a good alternative but very expensive. Realistically costs would have to come down significantly if it was an alternative to natural gas / electricity."*

RETAILERS

Top responses from retailers were more mixed and included: Jemena is positioned to invest in renewables and do it at a large scale. Others believed it was too expensive and were dubious about replicating at scale. Others indicated it was not applicable to them.

This contrast with the large user responses is demonstrated by the Figures on page 24.

Example responses from retailers include:

- *“Yes, as Jemena is uniquely positioned to use its existing infrastructure.”*
- *“This needs to be of the scale in Pilbara WA.”*
- *“Production of hydrogen would be a last resort if there is clearly a catastrophe - hugely expensive to produce.”*

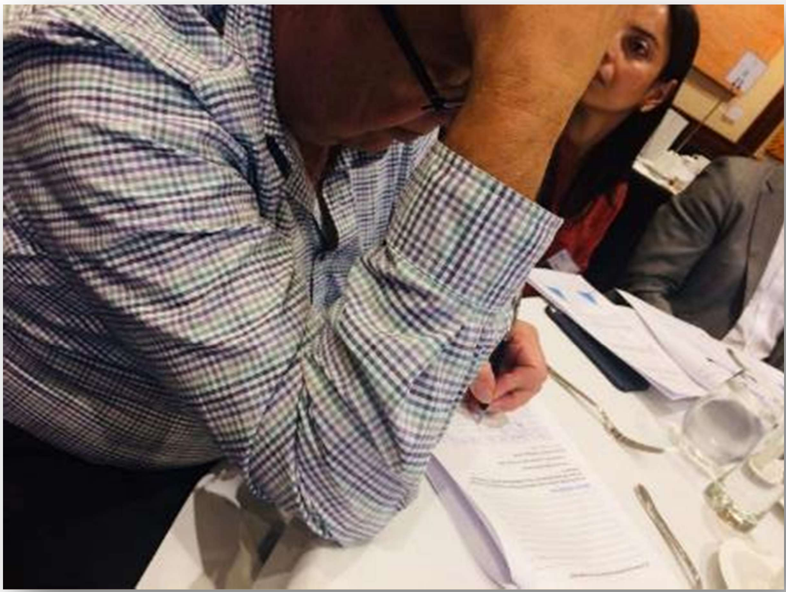

Figure 25a: Participant writing at the forum.

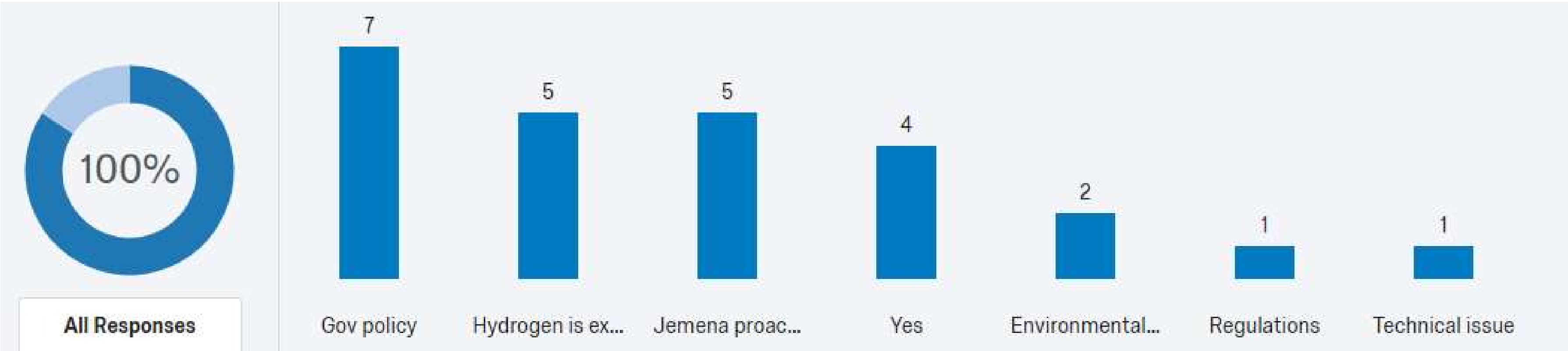

Figure 26: Thoughts from **large users** on transitioning to hydrogen by frequency of mention.

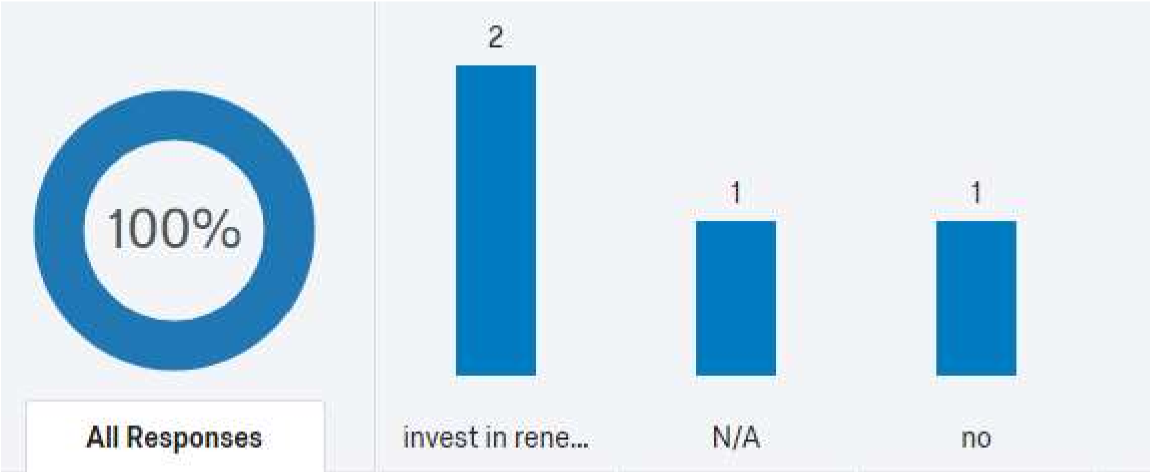

Figure 27: Thoughts from **retailers** on transitioning to hydrogen by frequency of mention. Caution low base.

To what extent do you think Jemena has a role in achieving this target?

Participants were asked about Jemena's role in achieving the carbon zero target. The variation between large users and retailers is included below.

LARGE USERS

Many large users felt that Jemena had a cutting-edge role – even a leadership, funding, research or innovator level - to play. Equally, many others were ambivalent in response to this question because they felt it would depend where Jemena wanted to fit into the energy market. Several other participants felt that Jemena's role was key in achieving the targets. Figure xx below details the responses, compared with the retailers.

Some indicative responses from large users across these three areas include:

- *"Help businesses access to funding - promote / trial new technologies."*
- *"Provided it's not part of the regulatory framework it's up to Jemena to decide the role that it wants to play."*
- *"I think Jemena's role will be an important one in influencing the end users of gas and development of gas safety standards and regulatory changes that will accompany these changes."*

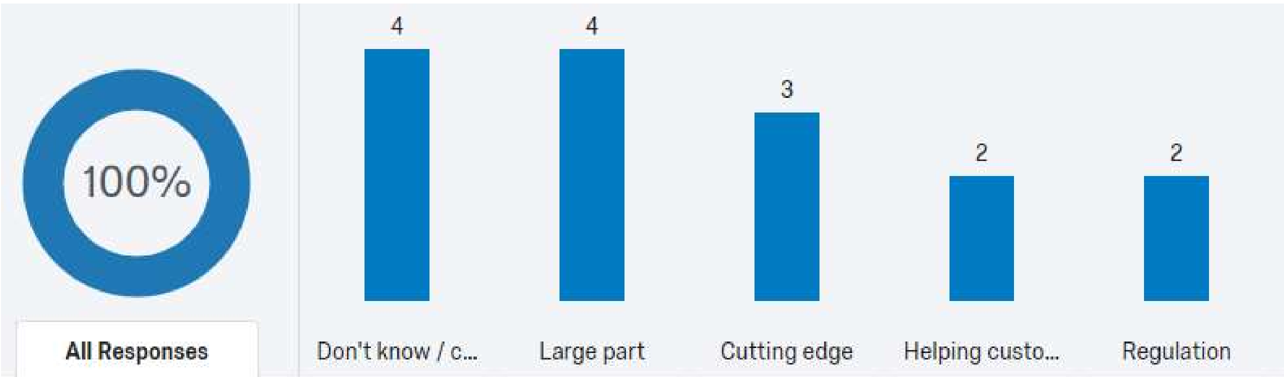

Figure 28: Thoughts from **large users** on Jemena's role by frequency of mention.

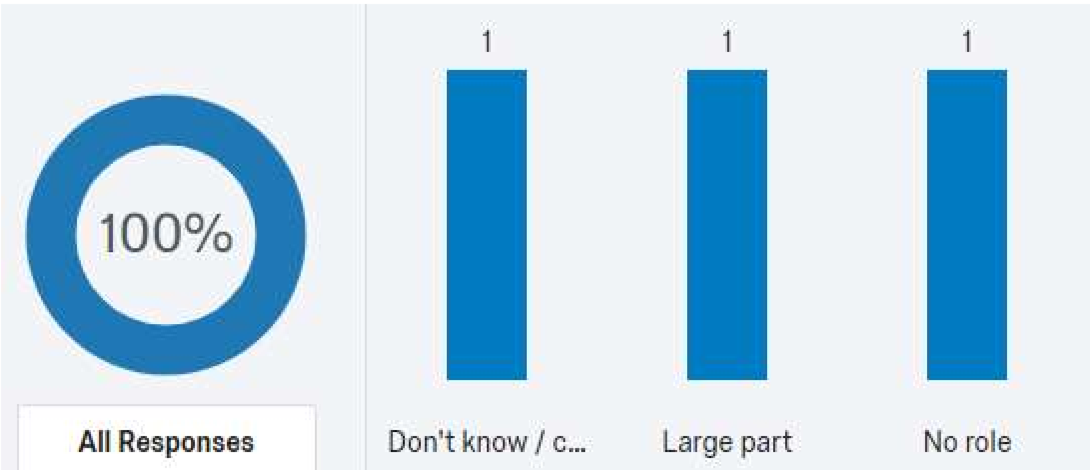

Figure 29: Thoughts from **retailers** on Jemena's role by frequency of mention. Caution low base.

RETAILERS

In contrast, the retailers are more ambivalent about Jemena's role as indicated by the chart above. Some are not sure, others believe all businesses have a role to play (and therefore a large part), and others believe Jemena's primary role is focused on transporting gas.

Some indicative responses from retailers include:

- *"Not sure!"*
- *"All businesses should value diversity of supply to provide value as well as end to end environmental policy."*
- *"No role, other than transport."*

Question 6: NSW 2050 Vision

In this question, participants were asked in what circumstances would they support Jemena implementing changes that caused a network price increase between 2020 and 2025?

The differences between large users and retailers is included below.

LARGE USERS

Four in ten large users indicated they would support changes in other circumstances, which are outlined on the next page (Figure 17). Nearly three in ten of large users they would support these changes only if the total Jemena network price still reduced. Twenty two percent said they would never support such changes, and six percent said they would only support if the AER supported them.

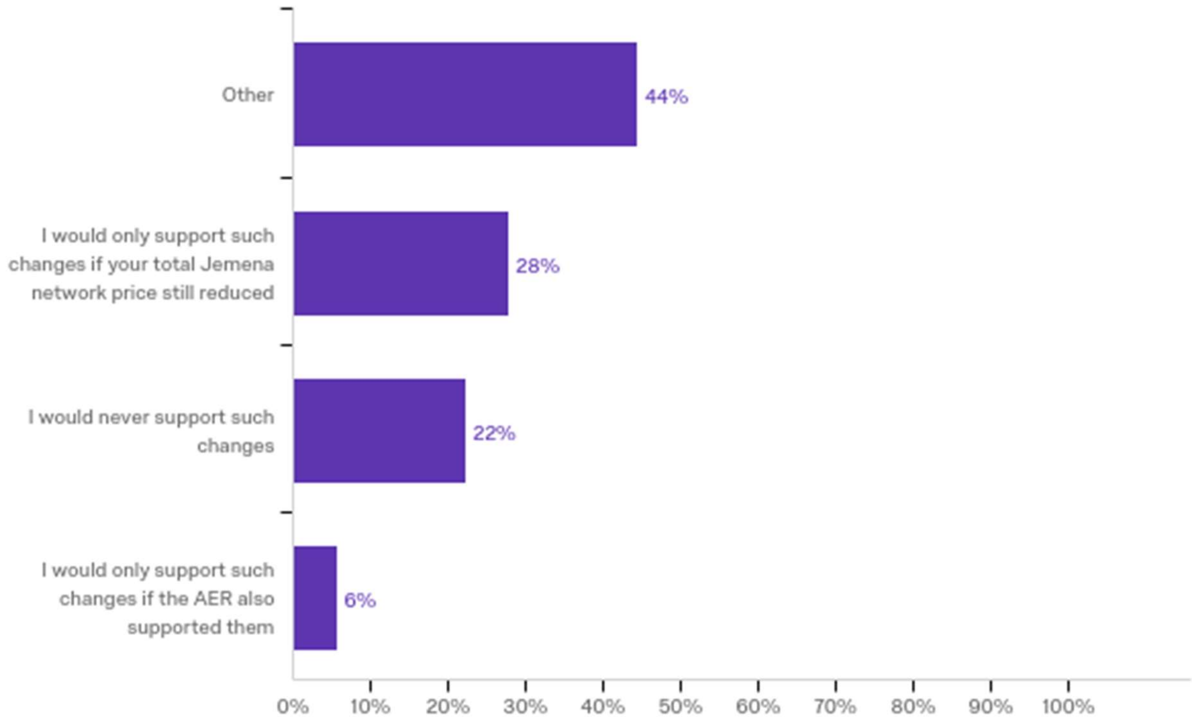

Figure 30: under what circumstances large users would support a network price increase (single response only, shown as percent)

‘Other’ category – Large Users

In terms of the ‘Other’ response category, from large users, this feedback was categorised across three major themes; only if there was a reduction in overall costs, being the first theme. Only if there was more available supply and reliability, is the second theme. The third area was about bill smoothing, and to Jemena consult and communicate. Some example feedback from each of these categories is below. Figure overleaf represents the text analysis of responses by frequency of mention.

Example quotes from large users:

Only if there was a reduction in overall costs:

- *“I would only support such changes if total Jemena network charges for non-residential customers went down.”*
- *“I would support changes if ultimately results in reduction of total delivered cost of gas - but must be done in a way that does not add to the burden for gas users while gas prices remain at very high levels. We need to ensure large users (manufacturers) are still around to benefit from any long-term investments.”*

Only if there was more available gas supply and reliability:

- *“Only supported if the additional cost relates to investment that is required to support expected gas demand at the least cost whilst maintaining reliability.”*
- *“If overall future benefit was there and if increase was limited if possible effect by decreases in gas price due to greater supply.”*

Only if Jemena consult and communicate / bill smoothing:

- *“Depending on how it was discussed with associated businesses. Smoothing would be preferred but this does depend on how the process is communicated.”*

Figure 31: ‘other’ response by category for large users..

RETAILERS

In terms of retailers, there is a major contrast as compared to large users. Seventy five percent of participants indicated they would only support such changes if the AER supported them. Twenty five percent indicated they would never support such changes.

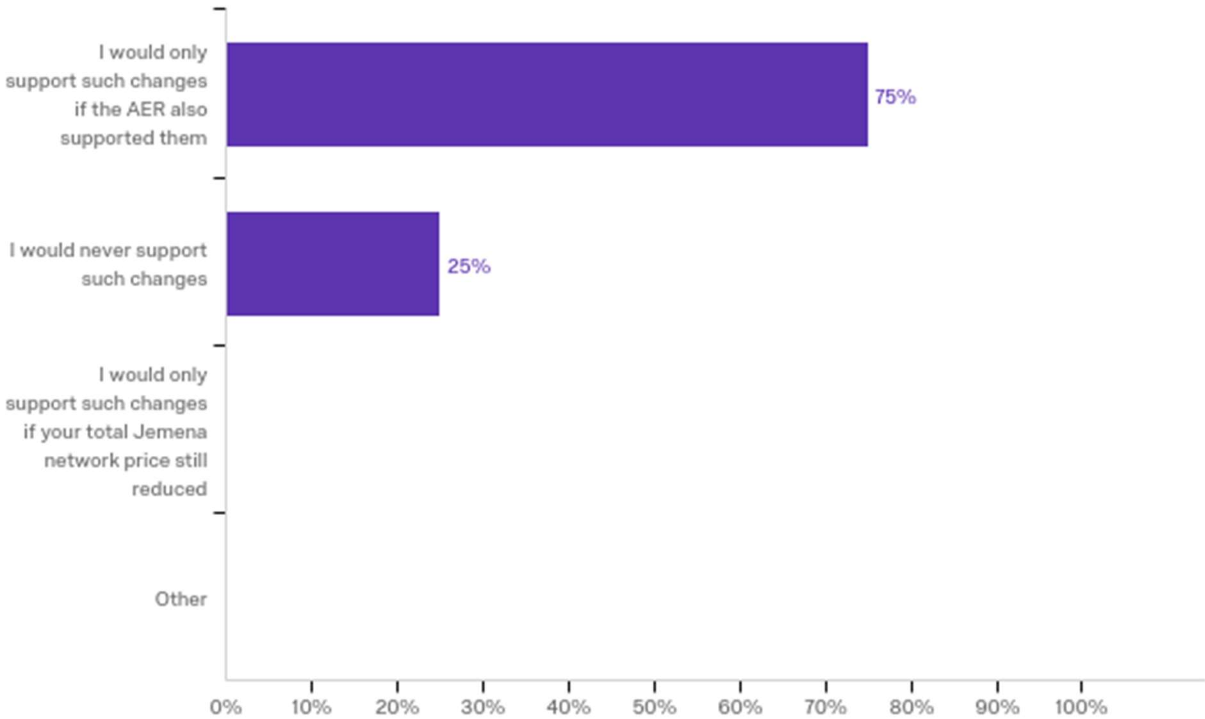

Figure 32: under what circumstances retailers would support a network price increase (single response only, shown as percent). Caution low base.

Appendix B

Post-event feedback forms

Overall, the results were positive, with participants providing reflections on what they most valued across a range of program elements. Top picks included the venue, the facilitation and the opportunity to meet and converse with the Jemena team.

The workshop timing was appropriate

Nearly eight in ten participants agreed or strongly agreed that the workshop timing was appropriate.

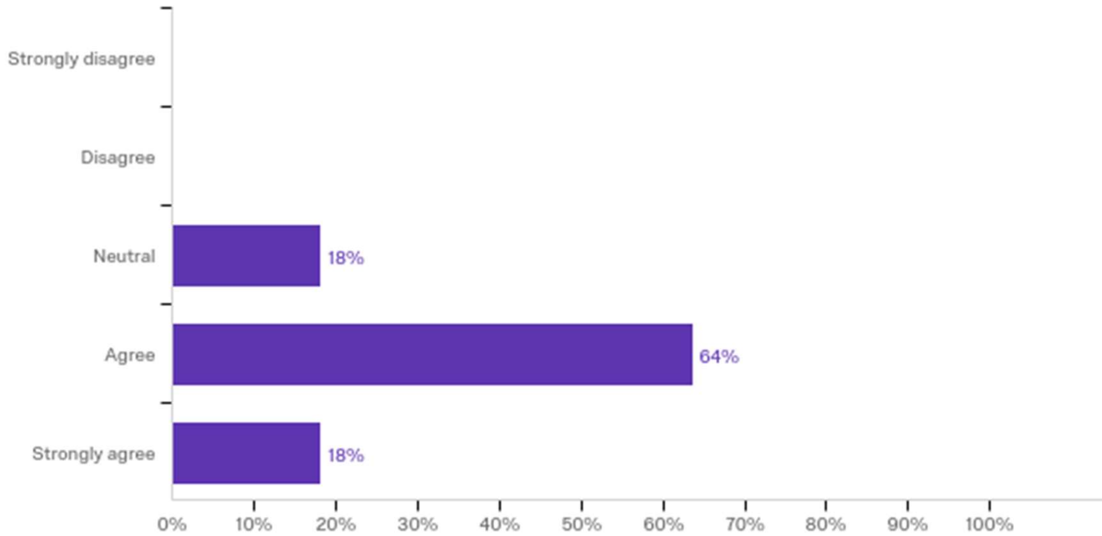

Figure 18: Participant feedback on workshop timing (percent)

Venue

All participants agreed or strongly agreed the venue was appropriate.

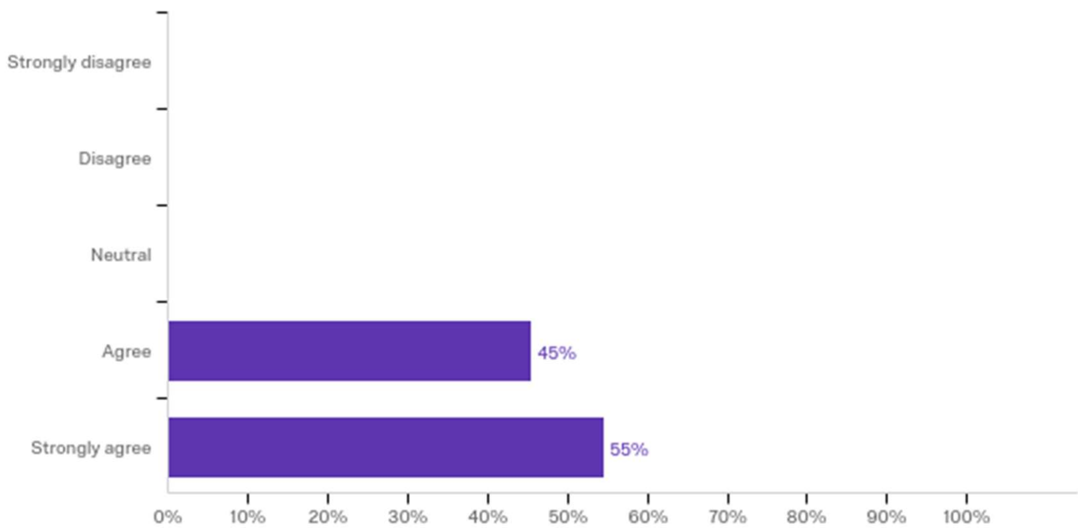

Figure 19: participants feedback on the suitability of the venue (percent)

Clear workshop objectives

Eight in ten participants agreed or strongly agreed that the workshop objectives were clearly stated.

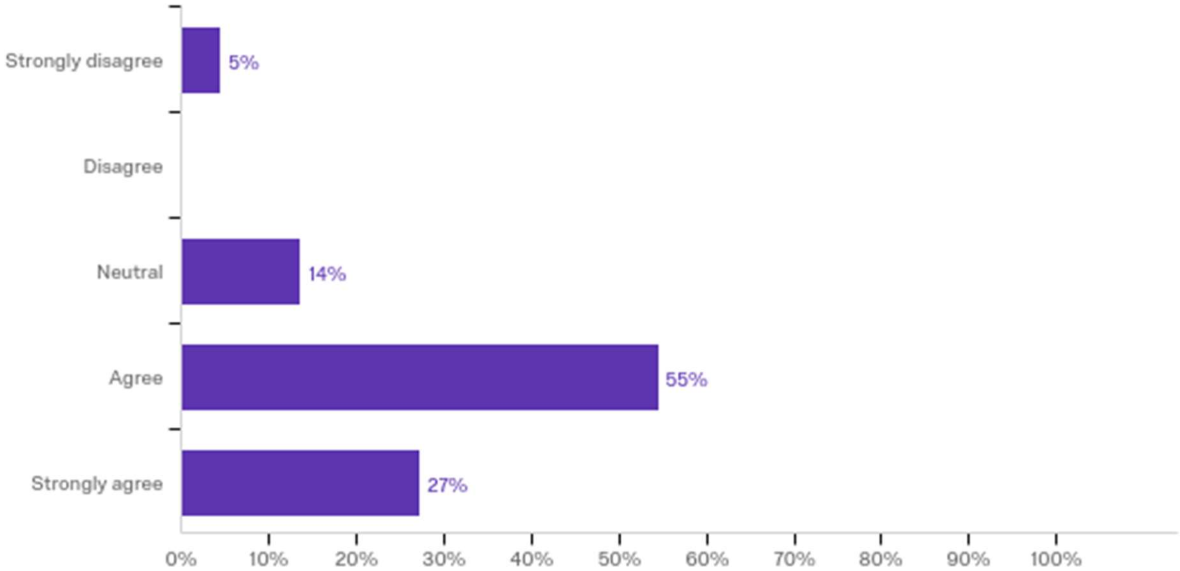

Figure 20: feedback from participants on clarity of workshop objectives (percent)

Clear and logical facilitation

Nearly nine in ten participants either agreed or strongly agreed with the statement: *the facilitator presented clearly and logically.*

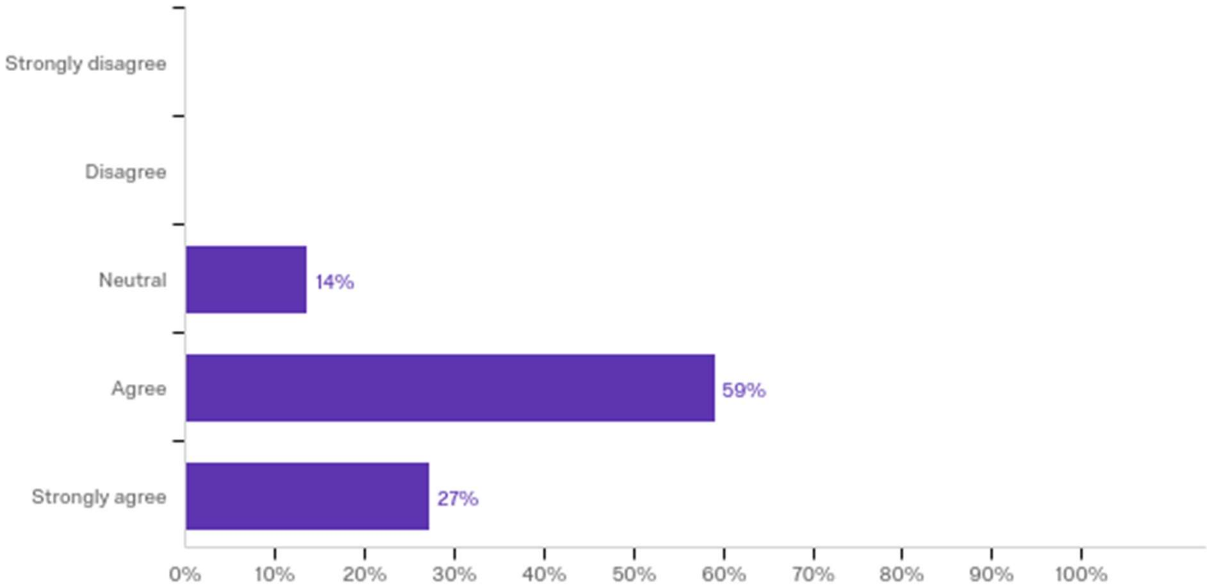

Figure 21: feedback on the logical sequence of facilitation (percent)

Workshop content

100% of participants either agreed or strongly agreed that the workshop content was interesting.

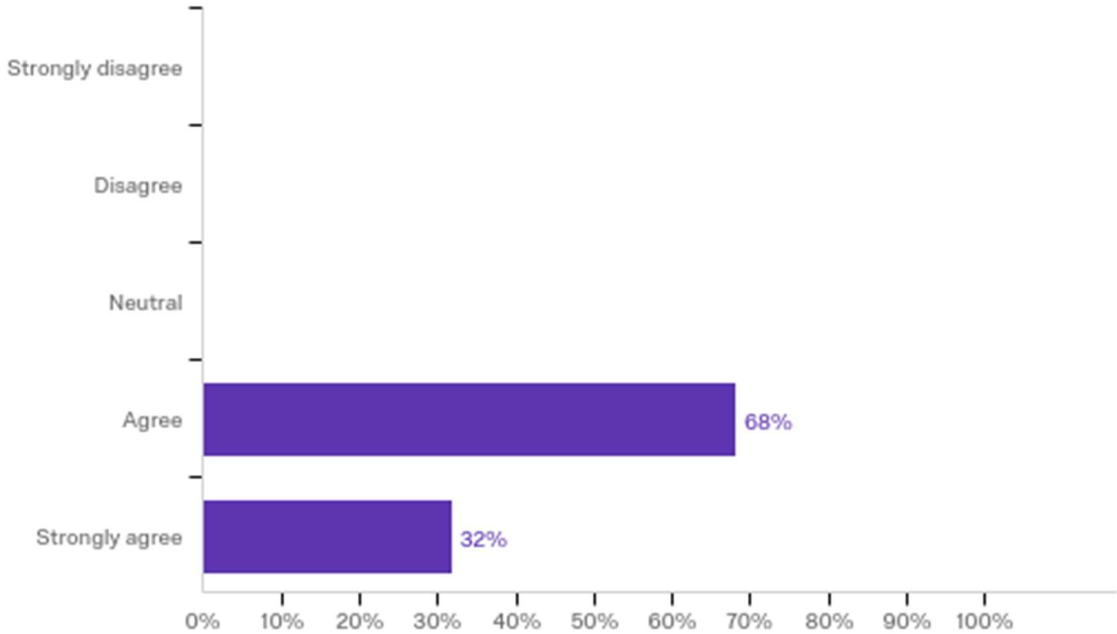

Figure 22: feedback on content of workshop

Facilitation

Participants were most favourable about facilitation skills with 100% indicating they agreed or strongly agreed with the statement: *the facilitator allowed me and others to have a say.*

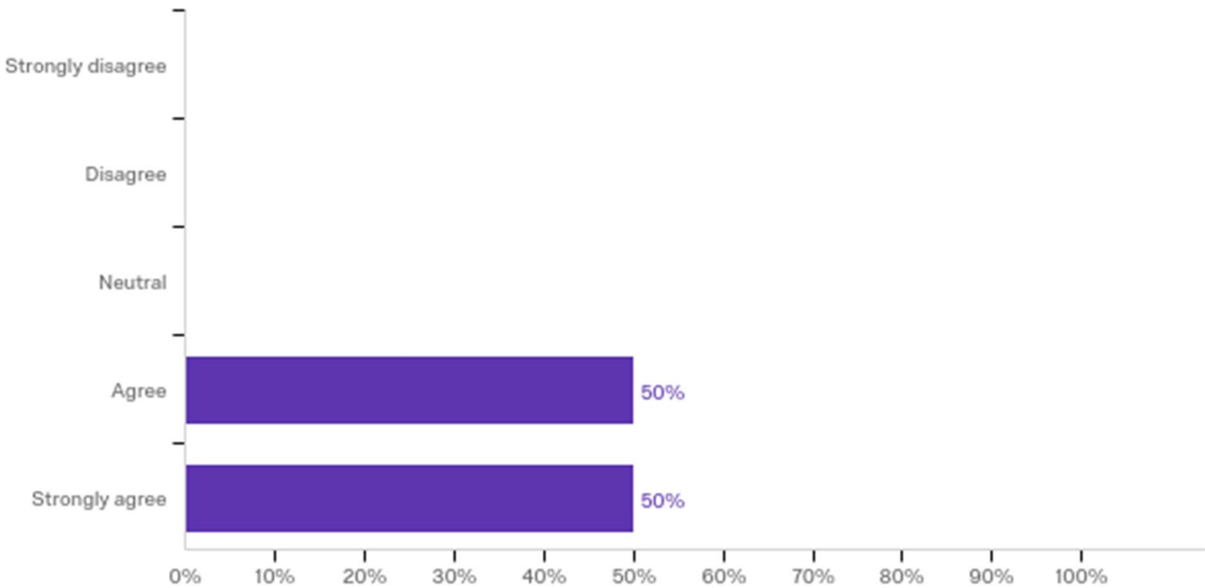

Figure 23: participants rated the skills of the facilitator very highly (percent – agree or strongly agree)

Participation

Nine in ten participants agreed or strongly agreed with the statement *there were opportunities for me to participate in an engaging and appropriate way.*

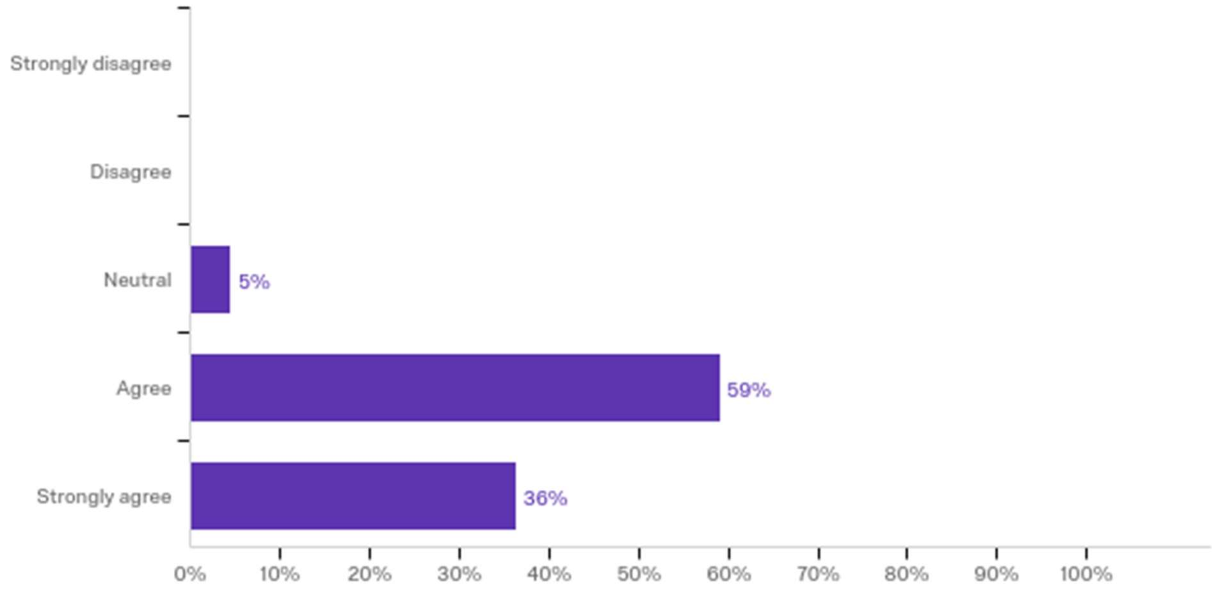

Figure 24: most participants agreed or strongly agreed with the statement that they were able to participate in an engaging and appropriate way (percent, single response only)

Trust in Jemena

5 in 10 participants agreed with the statement that they trust Jemena more than before. Four in ten were neutral.

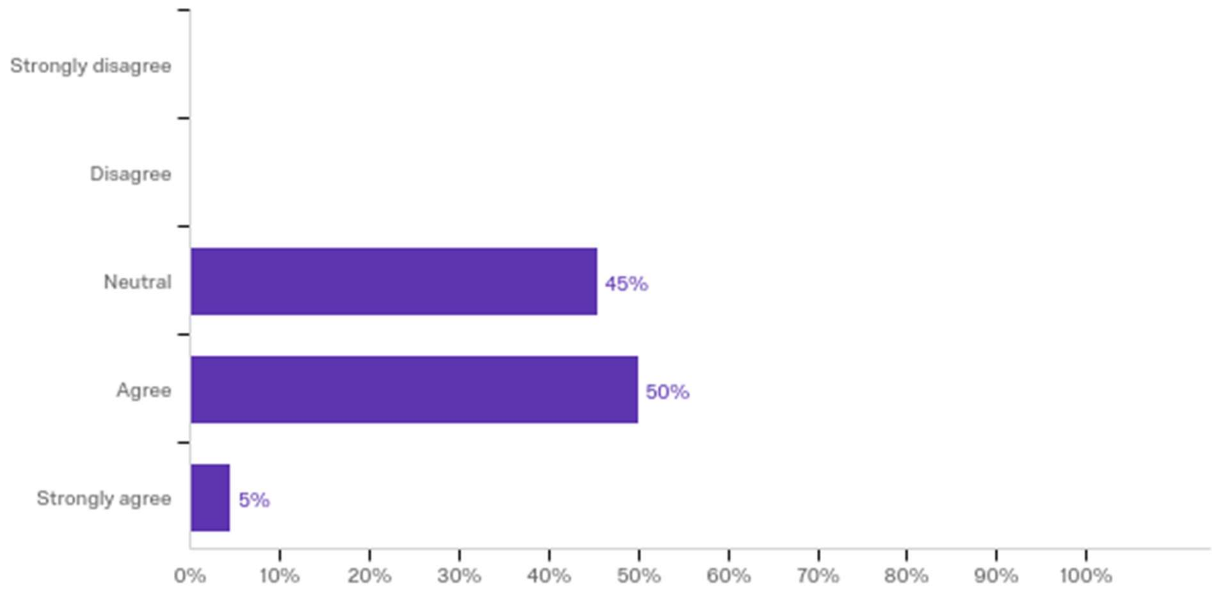

Figure 24: Just over half of participants rated Jemena as more trustworthy than before (percent, single response only)

Suggestions

When asked if they had any suggestions as to how the workshop could be improved, top feedback was more data and practical information, more networking time and more interaction. Some of the feedback is below:

- *There is never enough networking time at these events so perhaps finger food may have helped to make the most of the time.*
- *More factual back-up data, when examples talked about need reference. Need better price vs delivery of innovation.*
- *Agenda worked well, clever engagement through questionnaire*
- *Academic presentation on hydrogen was not helpful. Biogas - very, very limited supply, it can never be a serious source of supply.*

Most valued

Participants most valued the networking, access to key information around research and development, tariff structures and access to the Jemena team in person, and in one place. Some supporting quotes are below:

- *"Meeting Jemena staff in person"*
- *"Learning about the gas market"*
- *"Learning about what Jemena is doing and plans for the future"*
- *"Good talking points to go to customers with."*
- *"It was worth coming to continue to build a relationship with Jemena that was non-existent two years ago."*

Other feedback

Other feedback included appreciation on the topics and learning opportunities and the initiative shown by Jemena:

- *"Excellent networking and learning opportunities."*
- *"Help us by reviewing our tariff!"*
- *"Less on future - Hydrogen - 20 years away - concentrate on issues relevant today - pricing, reliability."*
- *"Very happy of Jemena's view of gas pricing."*
- *"I think it's a fantastic initiative that you are engaging your customers in general and in regard to the upcoming arrangement. Well done! and thank you for having me here at the forum."*

Appendix C

Companies represented on the day

Large User	Consultant	Retailer
BlueScope Steel	Unidentified Energy Consultant	Origin Energy
Brickworks		Weston Energy
Boral Limited		Unidentified Retailer x 2
Coca Cola Amatil		
CSR – Large user		
Healthshare NSW		
Interface		
Kinect Energy – consultant		
MacFarlane Lawrence		
Macquarie University		
Monroe Springs		
Orora		
Sofitel Sydney Wentworth – Accor Group		
Weathertex Pty Ltd		
Weston Energy – Weston Aluminium		
UNSW		
Unidentified Large Customers x 3		

Please note those who declined to participate in the consultation (there were two participants who declined to write in the work books and answer questions). They are excluded from this participant list.