



An Energy Company for Wales? Stakeholder Engagement Events

Summary Report

by Andrew Darnton
for Welsh Government Decarbonisation and Energy Division
16th June 2017

Contents

1. Executive Summary	p.3
2. Background and Methodology	p.5
3. The Energy Company Recommendation	p.8
4. Priorities for the Welsh Government	p.18
5. Ways Forward	p.19

Annexes:

i) Attendees & Speakers	p.24
ii) Event Agenda	p.31

1. Executive Summary

In March 2017, the Welsh Government commissioned a stakeholder engagement process across Wales to explore the relative merits of the Environment and Sustainability Committee’s Recommendation that the Welsh Government should establish a not-for-profit energy services company for Wales. The process was required to explore alternative options, before reaching a balanced set of recommendations for practical ways forward. The engagement process comprised a series of three stakeholder workshops across Wales, held in March 2017.

Across the three Energy Company Events, a clear consensus was reached that it was not the proper business of the Welsh Government to set up an energy supply company. For the majority of delegates at the events, the risks, challenges and tensions inherent in the Government setting up and running a supply company heavily outweighed the potential benefits of doing so.

The consensus view against a Government-led energy supply company was reflected in the voting exercises held at each of the three events, the total results of which are shown below:

	No (-1)	Maybe (0)	Yes (1)	Mean	n
Should WG lead in the development of an all-Wales (not for profit) energy supply company?	38	17	17	-0.29	72

Participants’ comments also underlined their widespread questioning of the Recommendation, for instance by saying:

“My instinct is to advise WG against ‘crashing into’ the supply market. If they were to do so, they would need new skills, very deep pockets, and a lot of luck.” [guest speaker, Aberystwyth]

“The complexity and risk around managing energy supplies cannot be over-estimated.” [guest speaker, Llandudno]

“Clearly supply is not a route to low carbon energy. For what the Government wants to do, the answer is not a supply company.” [guest speaker, Cardiff]

The main benefit of a supply company, in principle, was seen to be the opportunity for the Government to make money from supplying energy, which revenue could then be used to fund its other goals for a low carbon energy transition (eg. tackling fuel poverty, supporting community energy). However, expert participants spelt out that there are not big profits to be made from energy supply, as margins are very tight, while substantial funds need to be available to allow the supplier to buy energy (and take positions) on the wholesale market. It was also doubted that it was the proper role of Government to take a position in a market in this way.

However, participants all agreed that the lack of a case for the Government setting up an energy supply company did not mean the Government could afford to do nothing. It was felt their objectives for a low carbon energy transition would be very unlikely to be met by those currently operating in the open market. The final section of the events concentrated on possible roles the Government could play. These included:

- Correcting ‘market failures’ eg. by running schemes to tackle fuel poverty, or encourage renewable generation;
- To close up the gaps between local production and local consumption;

- Continue to prioritise demand reduction, including through better energy efficiency measures, and behaviour change;
- Ensure the energy system (and transition) works for the citizens of Wales, and in line with the principles of the Wellbeing of Future Generations Act.

Some of these objectives could be advanced by an All-Wales energy services company, but it was felt that would not be an energy supply company. Instead, the consensus among participants was that the Government's role was to govern, and ensure that all stakeholders worked to deliver benefits for Wales and the Welsh people. The Government was seen to be uniquely well-placed to convene stakeholders across the energy system, and to support them all to collaborate, to help deliver the objectives set by Government for a low carbon energy system.

The three Energy Engagement events were seen by many participants as an example of how Government could convene stakeholders around this issue. There were clear calls for the conversation begun at these events to continue, and to deepen.

2. Background and Methodology

2.1 Context

In March 2017, the Welsh Government commissioned Andrew Darnton (of AD Research & Analysis), in partnership with Clare Sain ley Berry (of WCVA), to design, deliver and report on a stakeholder engagement process across Wales which was positioned as the start of a conversation with stakeholders the Environment and Sustainability Committee's Recommendation that the Welsh Government should establish a not-for-profit energy service company for Wales.

The engagement process was required to consider the recommendation for WG to take the lead in developing such an energy company, and to explore alternative options, before reaching a balanced view on practical ways forward. It was stipulated that the process should centre upon a series of three stakeholder workshops across Wales, to be convened in March 2017.

The engagement events were designed to bring together interested and informed stakeholders from across the energy system, and representing diverse interests within the sector: including the regulator, big supply companies, and community energy producers, among others. The events should reflect regional variations in views across Wales, as the energy transition foreseen by the Government would naturally need to build on the assets and resources of different areas and communities in Wales. Above all, the energy company Recommendation should be approached as one means of advancing the transition to a low carbon energy system, and the workshops should make sure to draw on delegates' wider expertise to inform Government's plans for advancing the energy transition whilst also delivering wellbeing for the people of Wales – in line with the principles of the Wellbeing of Future Generations Act.

2.2 Objectives

Within the broad aim of exploring the Committee's recommendation, specific objectives were agreed for the stakeholder engagement exercise, as follows. The process should:

- Engage relevant stakeholders in informed debate about the merits and practicalities of an all-Wales not-for-profit energy company
- Take account of the assets and activities in different parts of Wales relating to local energy generation and supply, including lower carbon systems
- Build a shared understanding of the dimensions of this debate, and the strengths and weaknesses of different ways forward, across diverse stakeholder groups, and within the Government
- Result in an authoritative account of the debate, including practical recommendations (with estimated costs and other numbers where possible) to progress this agenda, including specific roles for the Welsh Government

In response to these objectives, Andrew Darnton designed an approach to the stakeholder engagement process which would be...

- Independent of Government, and impartial in representing the distribution of views across stakeholders;
- Informed by current practice, with all recommendations clearly referenced to supporting evidence;
- Embedded in the Welsh context and differentiated according to regional and local variations.

2.3 Methodology

A series of three stakeholder events were scheduled across Wales, as follows:

- i) Aberystwyth (Welsh Government Offices) Friday 24th March
- ii) Llandudno (Venue Cymru) Wednesday 29th March
- iii) Cardiff (Jurys Inn, Park Place) Thursday 30th March

Working in close collaboration with the Welsh Government, Andrew Darnton designed the flow for each of the three events; he then acted as lead facilitator at each event, before reporting on the findings. Clare Sain ley Berry and colleagues at WCVA took charge of the logistics -handling all aspects of the venues, delegates, and translation. These two aspects of the methodology are outlined in more detail below.

• Logistics

Each of the three events was promoted to a diverse group of interested stakeholders, including representatives from:

- Local government
- Community energy groups
- Private sector energy organisations including supply companies
- Third sector energy specialists
- Housing associations
- The regulator (Ofgem)
- DNOs
- Academia

The events were explicitly designed to be open to all interested parties, and invitees were encouraged to forward the invitation to colleagues.

The events were designed to encourage the use of English and Welsh.

The events were arranged and promoted at relatively short notice; the first invitations were sent out less than two weeks before the first (Aberystwyth) event. Nonetheless, the first two events each attracted nearly 30 attendees, while the third (Cardiff) event attracted nearly 80. [Full details of attendee names and numbers are given in Annex 1]

• Design & Facilitation

Each event ran between 11am and 4pm, following a consistent format; this is detailed in Annex 2, but its shape in outline was as follows:

[AM]

- A presentation by WG on the energy company proposition, and their wider activity on energy decarbonisation
- Short inputs from guest speakers, including representatives from local government, community energy groups, energy supply companies, and regulators

[PM]

- Panel discussion with the guest speakers
- Groupwork to develop ways forward, in relation to the 'energy company recommendation' and the role of WG going forward
- Conclusions and next steps

The format remained consistent across the three events, although some details (eg. how questions were framed, what supporting information was provided) evolved as the 'exploration' moved from place to place – there was a sense of the learnings being cumulative, building up to the final event in Cardiff. Partly for that reason, some delegates who had attended in Aberystwyth or Llandudno chose to come on to the Cardiff event. This was particularly true of the guest speakers, some of whom attended all three events.

Simon Thomas AM – the local Member (Mid and West Wales) and Plaid Cymru Spokesperson on Energy, Climate Change and Rural Affairs – attended the first event in Aberystwyth and helped to set out the context for and background to the Committee's Recommendation, before taking questions from the floor. Among the minor refinements to the format, as well as the fact that 8 guest speakers (not the previous 5) had to be accommodated in Cardiff, it should be noted that greater clarity was given to the delegates regarding the focus of the Recommendation (on an energy supply company, as opposed to any other kind of energy services company). This was also reflected in the final vote on the Recommendation, in which attendees at Cardiff were invited to specify what kind of a services company they had in mind when they voted.

All three events used Meeting Sphere, an interactive system for capturing and feeding back delegates' views in real time. Delegates were encouraged to submit questions and observations in response to each of the speakers, in real time, using tablets. At intervals, they were also invited to take part in quantitative exercises: ranking priorities, and ultimately, voting on the Energy Company Recommendation. The interface enabled all delegates to contribute equally to the engagement process (and in either language), and also meant that they could see other delegates' comments as the event unfolded – and respond to those comments, if they chose to do so.

Andrew Darnton's final task was to report on the series of events. This has resulted in three detailed reports, representing the material delivered by each speaker and providing a commentary, on each event in turn. These are supplemented by this summary report, which provides a synthesis of the views across the three events, and brings together delegates' suggestions for ways forward – both in relation to the Energy Company Recommendation, and the wider task of enabling the transition to a low carbon energy system in Wales.

3. The Energy Company Recommendation

1. The Recommendation

The Recommendation for a Not-for-Profit Energy Company for Wales is taken from the report of the National Assembly for Wales' Environment and Sustainability Committee: 'A Smarter Energy Future for Wales' (March 2016). It is important to reproduce the Recommendation in full (the core text is shown in **bold**, added here):

A not-for-profit energy company for Wales [page 14]

31. People are tired of ever increasing utility bills and a lack of choice of energy providers. There are alternatives to the 'big six' energy companies which dominate the market. Across England local authorities are setting up not-for-profit energy supply companies. In Wales we have experience of a highly successful not-for-profit utility company - Dwr Cymru. Let's build on this success.

32. The Committee heard how some English local authorities, including Bristol and Nottingham, are able to target fuel poverty by supplying energy to households in their area at a reduced rate. In Nottingham, Robin Hood Energy has a tariff exclusively for the residents of Nottingham City and can specify lower rates in areas where fuel poverty is concentrated. In Bridgend, the Council is providing local heat networks and in Wrexham the Council has delivered the largest solar energy scheme in the UK.

33. There are a number of risks and challenges in setting up an energy company. **We believe that the most suitable approach for Wales is to set up an umbrella energy service company for Wales. Under this umbrella, local authorities, city regions or communities can offer 'white label' energy supply locally.** White label supply means the authority does not hold a supply licence, but instead works in partnership with the licensed umbrella 'partner supplier' to offer local tariffs under their own branding. Robin Hood Energy is pursuing this model with other local councils and housing associations. **Such a not-for-profit energy service company would ultimately aim to source all its energy from renewable sources in Wales.**

The first observation delegates made about the Recommendation was that there is a degree of ambiguity in it. The headline recommendation is for "a Not-for-Profit Energy Company for Wales". This is then restated as "an umbrella energy service company for Wales". The terms of the Recommendation were used to frame the series of engagement events, and required that the proposition of an energy service company be explored broadly. However, the context of the Recommendation implies that the Committee was proposing a company which could "offer 'white label' energy supply locally" – that is to say, an energy supply company.

This ambiguity was keenly felt in the first of the series of energy company events; as one consequence, the full text of the Recommendation (exactly as reproduced here) was made available to all delegates in hardcopy at each of the subsequent two events. In order to counteract any ambiguity, by the end of the first event, and at the next two, it was made clear to delegates that when responding to the Recommendation, they should do so in the specific sense of an energy supply company (licensed to buy energy on the wholesale market, and to sell it direct to householders themselves or through 'white label' third party partners).

2. Dimensions of the Debate

2.1 Purposes of an Energy Company

At the first event, in Aberystwyth, when Simon Thomas AM introduced the Energy Company proposal – calling it by the name under which it had first appeared in the Plaid Cymru manifesto, Ynni Cymru – he identified numerous purposes which it was felt such an energy services company could serve. These included:

Increasing renewable generation; developing better storage solutions; installing more solar power; reducing energy costs per unit; increasing energy efficiency; decreasing blackouts and brownouts; bringing new technologies to the market; being a white label supplier for our local authorities.

This list of ambitions may relate to the ambiguity delegates sensed in the Committee's Recommendation. Energy experts among the delegates – for instance, the guest speakers – were clear that an energy supply company could not deliver on this full list of ambitions. The critical thing, they felt, was to start from the purposes, and then identify the solutions – and potentially, the energy company – that could address them.

“First, ask yourself what is broken. What do you want from this all-Wales energy company? The Recommendation is for cheap energy, Welsh energy, green energy, and a supported tariff for the fuel poor. It's impossible to do all these. You can't buy a lot of energy expensively and sell it cheap.” [Guest speaker, Llandudno]

Not only would too many ambitions become too costly to afford, but it was widely observed that some of the objectives were running counter to one another, to the point of incompatibility.

“How can the energy supply company offer cheaper tariffs in Wales and also generate substantial surplus profits to fund such high cost aspirations such as investment in renewables?” [delegate, Aberystwyth]

Because the supply company would have to operate in a competitive marketplace, it was felt that it would struggle to be profitable and deliver the additional resources required to support the Government's more prosocial aims. Further, some delegates objected to the assumption in the Recommendation that energy prices were too high, saying that the Government's aim should be to drive down demand for energy, not energy prices.

“Some public bodies are trying to supply cheaper energy, but I don't want people to have cheap energy, they'll waste it.” [Guest speaker, Llandudno]

Some delegates went further and suggested that the idea of an all-Wales energy company had preceded any analysis of the needs for decarbonising the energy system.

“Is this a solution looking for a problem?” [delegate, Aberystwyth]

2.2 Examples from Elsewhere

In Aberystwyth, Simon Thomas concluded his list of ambitions for an energy service company by saying:

“Finally, if we don't do this, we will be overtaken by England.”

As well as identifying current examples of community energy projects in Wales, the text of the Committee's Recommendation includes reference to energy supply companies set up by

local government bodies in England. In view of this, energy companies and advisors associated with setting up those supply companies were among the delegates invited to be guest speakers – so that the exploration events could be informed by detailed knowledge of how those Councils and their companies had fared. As it turned out, the energy supply companies themselves were unable to attend, or sent representatives and consultants who were working with them and would speak on their behalf (although they also drew on their wider experience in the energy market, which was perhaps even more enlightening for delegates).

There are reportedly 58 licensed energy supply companies in the UK at the time of writing. A number of these supply companies and their public-sector parent organisations repeatedly featured in the discussions, and delegates drew on these examples when evidencing their views on a possible All-Wales energy supply company. Note that the descriptions below should be treated with some caution, as they are based on the comments of delegates and expert speakers (made in plenary and via Meeting Sphere). None of these details have been confirmed by senior management in each of the organisations themselves.

- i) **Robin Hood Energy**
Robin Hood Energy is a private limited company which is wholly owned by Nottingham City Council. It operates on a not for profit basis and there are no dividends distributed to the shareholder (the Council). Any profits achieved are retained in the organisation to support the service offer. It focuses on local benefits through a Nottingham tariff, though under the terms of its licence it also operates nationally. Robin Hood Energy operates on very low overheads and margins and needs to build customer volumes to meet business plan targets and to break even. Part of Robin Hood's USP is to build effective partnerships with other local authorities and social housing providers. Whilst it is primarily about domestic supply, the company also holds a commercial supply licence and is also registered to administer Feed in Tariffs (FiTs). Part of the reason for its creation is the Council's ambition of municipality, and a tradition of operating its own services. Robin Hood isn't vertically integrated (i.e. does not own its own generation and distribution assets) and its business model is based on acquiring customers both locally and across the UK through offering more competitive tariffs and providing better customer service than some of its main competitors. It also does this through collaborating with a series of 'white label' partners who in turn recruit their own customers (including Leeds City Council, Liverpool City Council and Ebico, a national housing social enterprise).
- ii) **Bristol Energy**
Bristol Energy is the second LA-owned supply company in England. It has now reached the end of its first year of trading, and has acquired nearly 50,000 customers. It was set up with £9.5m of taxpayer's money, to cover both set up and initial operating costs up to break even. It is designed to provide a revenue stream for the Council, which in turn is reinvested in energy efficiency work (through a separate entity within the Council), and action on fuel poverty. For instance, Bristol Energy offers a supported tariff to vulnerable consumers (although this is limited to 1,000 homes). It is estimated the company will need 250,000 customers to break even.
- iii) **Our Power**
Our Power featured in passing in a number of the discussions; it is a fully licensed supply company operating primarily in Scotland, set up by a partnership of social housing associations. Some delegates underlined that this model was worth exploring.

- iv) **The Greater London Authority**
 The GLA has been going through a process of applying for ‘licence lite’ from Ofgem since 2009. This is a junior supply licence which allows the holder to sell energy direct to consumers by working with a third party fully licence supplier which complies with the relevant industry codes. This was summarised by one guest speaker as “taking all the customer-facing responsibilities but none of the industry-facing roles”. Despite the GLA applying for licence lite, they have not put it into operation (indeed nor are there any other companies in operation holding a licence lite). Speakers speculated that this may in part be down to political realities at the GLA, and uncertainties over how best to advance their ambitions for London in a complex energy system.
- v) **GB Energy**
 GB Energy was also mentioned in a number of discussions. It is best known as the most recent energy supply company to go into liquidation. As one speaker commented:
“GB Energy collapsed because they had customers on fixed rate tariffs, but they couldn’t pay for energy when the price on the wholesale market went up. They went bust overnight.” [Guest speaker, Llandudno]
 Using the Meeting Sphere interface, a delegate responded:
“The GB Energy collapse has been badly reported. They did not hedge their traded position, at all, which is pure gambling. If you gamble on the day ahead market for the entire portfolio of customers then you do not have to stump up collateral payments, grow artificially fast (160,000 customers in 1.5 years) and can say ‘hey we can offer the cheapest rates here and still make 3% profits’. But any (ultimately expected) spike in wholesale prices will be devastating to a supplier in this position” [delegate, Llandudno]

2.3 Risks

Just before introducing their Recommendation, the text of the Committee’s Report mentions that *“There are a number of risks and challenges in setting up an energy company”*. These ‘risks and challenges’ dominated discussions among guest speakers and delegates alike. The main risks they identified in setting up and running an energy supply company are outlined here, with delegates’ comments against each – the challenges follow below.

The overall position on risks of the three Energy Company Events can be summed up thus:

“Potential political disaster if it goes wrong.” [delegate, Cardiff]

- **Margins**

“There is a myth that there is big money to be made from supplying energy.” [guest speaker, Llandudno]

“There are no big profits in the supply business.” [guest speaker, Llandudno]

“Supply business margins are tight – and should be – otherwise prices to consumers are unreasonably high.” [guest speaker, Cardiff]

- **Scale**

“Energy supply is a difficult market to enter if you don’t have scale and aren’t vertically integrated (ie. don’t have your own generation)” [guest speaker, Aberystwyth]

“The supply sector is about high customer volumes and very low margins – and Robin Hood has very low overheads.” [guest speaker, Aberystwyth]

“Small companies don’t have the volume or credit lines to hedge in the market”. [guest speaker, Llandudno]

- **Costs**

“It’s a question of scale. Also a volatile changing market, increasing prices and regulatory risk. Plus £2m or £3m entry costs.” [guest speaker, Cardiff]

It was reported by a guest speaker at the Cardiff event that Bristol City Council loaned Bristol Energy £9.5m to start it up. The comment triggered the following responses from delegates:
58. *What would that £9.5M do if invested directly in energy generation and saving in Bristol council assets?*

59. *Our research into independent set-ups suggests most get going at a fraction of that cost.*

61. *Yes, but they’re clearly not hitting their sales targets.*

63. *To answer q59 - it isn’t about getting going, it’s about funding the growth (all customer recruitment costs come at the beginning) of acquiring 250,000 customers and the staff needed to deal with them*

60. *£9.5m includes the expected losses for the first few years of operation as well as the set-up costs.*

“Who pays? You need £20m to float it, as an idea of scale.” [guest speaker, Llandudno]

- **Timescales**

“Robin Hood projects a minimum 3 years to break even.” [guest speaker, Llandudno]

[on Bristol Energy] *“64. And on Q61 - they are a bit short of target, but not much. It will take 3 years of hitting targets to get to break even... It’s 6 months in, so still burning through costs of customer acquisition.”* [delegate, Cardiff]

“If you are only in it for the short term, it won’t succeed. It generates very little revenue that at least initially you can put back in.” [guest speaker, Cardiff]

- **Opportunity Costs**

“This will distract resources from other solutions” [delegate, Aberystwyth]

[on Bristol Energy] *“...It’s the time and effort and resources it’s soaked up which could have been applied to other sustainable energy challenges (or generation or heat network assets).”* [delegate, Cardiff]

2.4 Challenges

The risks identified above relate both to uncertainties in the system on the one hand, and the need to take (ie. buy) a position in the market on the other - and recoup that investment. As well as these inherent risks, the Committee’s Recommendation talks of challenges: practical difficulties in operating in the marketplace, which would need to be addressed if an energy company were to be successful. Some of these practical challenges are specific to, or heightened by, being a public sector body in a commercial space.

- **Trust**

“Energy supply companies are among the least trusted institutions in the UK” [guest speaker, Llandudno]

“Panel make a good point that LAs are trusted but is a Welsh brand as popular? Compare people's perception of their own local authority to their perception of Welsh Government for example. how would this be addressed?” [delegate, Llandudno]

[On Licencing models] *“Which mechanism to use depends on what the problem is. If it's trust, then you need to be the customer-facing brand.”* [guest speaker, Cardiff]

This comment undercuts the point that, because the Welsh Government can bring their / the 'Wales' brand to the table, they will succeed better in the supply business than private sector actors – with greater trust, customers may be more inclined to switch to the All-Wales company, and may also take more heed of energy efficiency advice from the company. However, if the Government were acting as an 'umbrella' brand, as the Committee suggested, it would not be their brand that went out to customers, but the brand of their white label partners – be they Local Authorities, housing associations, private organisations. Nor is it the case that the Government could endorse or promote its partner suppliers, as that is likely to contravene State Aid, such that all operators would need to be endorsed equally.

- **Switching**

Building customer numbers (ie. achieving scale) requires customers to switch supplier. So does getting customers onto cheaper tariffs – which is part of the mechanism by which a State-owned supplier could tackle fuel poverty. However the majority of domestic energy customers tend not to switch – the latest Ofgem figures discussed at the events suggest switching is on the increase (particularly to some of the newer, smaller energy companies), but stands at 20% annually (a proportion which includes many regular or repeat switchers – hence the 20% is not cumulative year on year).

“We try to engage consumers, to try to make the market work. For this to happen, you need diverse offerings and engaged consumers (to apply the pressure).” [guest speaker, Llandudno]

“All across the market there is a lack of confidence among consumers. Lots of people don't buy well, even from the big suppliers, because they're not confident in what they're buying.” [guest speaker, Llandudno]

The Energy Local project in Bethesda offers a sharp case in point.

“In Bethesda we have managed to get 7% of households to switch. We offer current customers a 35% cut in energy bills. And it's locally generated power. We've been door to door and everything. But it's been an incredibly difficult process to get customers to switch, even for a 35% saving. People are hardwired not to switch.” [guest speaker, Llandudno]

- **Capacity and Skills**

“It's a lot of work, high risk, and outside the existing area of expertise for WG.” [delegate, Llandudno]

The point was also made that recruitment is a competitive market; not only would the Government need to bring in new competences from outside, but it would need to compete

with other employers in the energy sector in order to do so (something which in itself would break with usual Government recruitment practices).

“Bristol Energy is very commercially managed. They have some REALLY good people (mainly recruited from Good Energy!) and pay them serious salaries so I think they are in the best hands possible.” [delegate, Cardiff]

“In addition there are back office functions. These involve accessing the grid, and working with DNOs. These interactions are governed by ‘codes’ (regulated by Ofgem) -and this is the bit new entrants to the market find most difficult.” [guest speaker, Cardiff]

“Supply licence and legals ‘in a box’ is about £100k. The small players have a cost advantage because they don’t contribute to the various fuel poverty and green levies, but they have a cost disadvantage because setting up all the back office type operational capabilities costs a fortune. The £2m estimate is high but not unprecedented. Ovo started with £500k.” [delegate, Cardiff]

- **Change**

While uncertainty increases the risks entailed in entering the supply market, it is also a challenge in itself. The picture that emerged from the Energy Company Events was not just one of a complex system, but a complex system in flux, with an unknowable future just around the corner. For example, an Ofgem speaker described themselves as *“regulating between the old world and the new world”*. Technological changes at the household level seemed to be at the front of this wave – in terms of cheaper(solar) generation, more effective storage (including electric vehicles), and most directly, the advent of 3rd party aggregation service providers who will intercede between consumer and supplier (eg. with apps, for switching, or ‘time of use’ demand management) – such that the supply company recedes from the consumer’s view.

The timescales required for successful supply company business models cited above appear to be in tension with the scale and pace of change in the energy market.

“What will the supply market look like in 5 years’ time? How do you feed in flexibility?” [guest speaker, Llandudno]

“Technological change may make this model redundant” [delegate, Aberystwyth]

“Given the trajectory of the cost of renewables and the knock on effect on wholesale electricity how long does the panel think that a market led model for energy is actually viable? 10 years? 20 years?” [delegate, Cardiff]

2.5 Principles

Unlike risks and challenges, principles are specific to the fact that it is a public body -and more than that, the Welsh Government – which is recommended to enter the energy supply market. Principles are effectively tensions arising from the Government setting up a commercial entity to compete in a marketplace.

- **Competition**

“If the aim is to provide the cheapest energy in line with 80% reduction in CO2 then how does this work in a ‘free’ market against other suppliers who may not have the 80% reduction goal?” [delegate, Cardiff]

“If we give it to the private sector we lose the benefits... you can give away the benefits but you can't give away the risks.” [guest speaker, Aberystwyth]

“Questions of competition: what are other nearby parties doing – do you want a Cardiff Energy fighting Wales Energy for customers?” [guest speaker, Cardiff]

“If you're competing on price, there are discounters out there whose prices don't reflect the actual cost of energy in the market.” [guest speaker, Cardiff]

- **Public Purpose**

“Bristol City Council has so far lent £9.5m into the company; as a Bristol City Council tax payer, I'm anxious that the company works, because the liability sticks with me and my fellow council tax payers!” [guest speaker, Cardiff]

“I agree that public money should be better used - can't understand how that can be justified!” [delegate, Cardiff]

“What would that £9.5M do if invested directly in energy generation and saving in Bristol council assets?” [delegate, Cardiff]

- **Impartiality**

“What happens to the role of State as honest broker when you have skin in the game? You forfeit that important role of honest broker / advocate / powerful critic if you have a vested interest in building market share and make competitors out of companies who previously needed your social/political/democratic blessing to operate. Who then becomes the honest broker?” [guest speaker, Cardiff]

- **Future Generations**

“If Welsh Government focus on a low cost (non-green) fuel poverty alleviation proposition are they in danger of breaching the Future Generations Act?” [delegate, Cardiff]

3. Conclusions

Across the three Energy Company Events, a clear consensus was reached that it was not the proper business of the Welsh Government to set up an energy supply company. As the synthesis of evidence laid out above demonstrates, for the majority of delegates at the events, the risks, challenges and tensions inherent in the Government setting up and running a supply company heavily outweighed the potential benefits of doing so.

In fact, as the evidence above also suggests, very few benefits were identified – beyond raising revenue, and that was clearly established by the expert speakers to be an uncertain outcome. What appear to be benefits are in fact purposes: if the supply company made money, that money could be reinvested in the efforts to transition to a sustainable energy system for all. In the meantime, the actual running of the company would do little directly to deliver on those purposes.

This clear consensus among delegates was reflected in the results of a voting exercise which was undertaken at the end of each event, using the Meeting Sphere software. Following the panel discussion, each delegate was invited to vote in response to a direct question about the Energy Company Recommendation. In fact, they were asked to vote twice: once before they moved into table discussions, and again after those discussions -at

the end of the whole event. The results of that final vote – aggregated across the three events – were as follows:

	No (-1)	Maybe (0)	Yes (1)	Mean	n
Should WG lead in the development of an all-Wales (not for profit) energy supply company?	38	17	17	-0.29	72

The results show that majority of delegates were against the Committee’s Recommendation – although it is notable that the proportions varied from event to event [see detailed Event Reports for the full results]. At the first event, in Aberystwyth, the majority of delegates who voted actually voted in favour of the Recommendation; the situation was reversed in Llandudno, and that opposition hardened in Cardiff. This may reflect regional variations in circumstances and opinions, though that effect will have been diluted by the relatively high numbers of delegates who travelled to more than one event. To some degree, the trend involves the developing of a clearer view of the Recommendation over time, as those delegates who attended multiple events reflected and learnt together. This is also true of the project team, who made small refinements to the flow and content of the day as the events progressed [as discussed in the Introduction]. It appears that the ambiguity inherent in the Committee’s Recommendation for a ‘Not-for-Profit Energy Company for Wales’ led some delegates in Aberystwyth to vote in favour of the Recommendation, when their comments at the end of the day made it clear that they were thinking of something other than a domestic supply company when they voted ‘yes’.

The clear balance of opinion against the Recommendation, as demonstrated by the final vote above, is underlined by the strength of negative opinion expressed in delegates’ and guest speakers’ direct comments about the Recommendation, made at the events. These views are illustrated below, in chronological order of the events:

“My instinct is to advise WG against ‘crashing into’ the supply market. If they were to do so, they would need new skills, very deep pockets, and a lot of luck”. [guest speaker, Aberystwyth]

“There may be a role for an energy company here, to facilitate local matching; it could also encourage behaviour change, and Time of Use demand shifting. But it’s not a domestic energy supply company.” [guest speaker, Aberystwyth]

“Is there a market solution out there? We do not think the energy company needs to be a supply company. Other organisations are doing this already. It’s about being a facilitator.” [delegates, Aberystwyth]

“The complexity and risk around managing energy supplies cannot be over-estimated” [guest speaker, Llandudno]

“I’m scared by the talk of an energy supply company – we’d support it, but it’s a lot of hard work” [delegate, Llandudno]

“Setting up an energy supply company is one of the most unsensible things a Government or council could do.” [guest speaker, Cardiff]

“Clearly supply is not a route to low carbon energy. For what the Government wants to do, the answer is not a supply company.” [guest speaker, Cardiff]

“Could be more effective regulating than being involved in the delivery. Not appropriate for WG to be an Energy Service Company.” [delegate, Cardiff]

As much as the evidence synthesised here shows a clear consensus that the Welsh Government should not get involved in the energy supply market, it also illustrates the near uniform opinion among delegates that the Government has to do something in order to fulfil its goals for a sustainable energy system.

What it is that delegates thought the Government should do is outlined in the following sections of this report, but here we should note the key elements of the case for Government action, as expressed at the Energy Company Events. First there are the assets the Government holds, and their responsibility to use and conserve these for the maximum benefit of the people of Wales:

“What is the sensible role for Welsh Government to play to enable Wales to make the most of its natural resources for the benefit of Wales?” [delegate, Cardiff]

“Without political ambition we won’t hit these targets. In the short term, the energy market will only create problems for these objectives. But the Government has the estates and the assets to make a difference.” [guest speaker, Aberystwyth]

As well as making the case for action, the latter comment neatly encapsulates the widely held view that doing nothing is not an option for the Welsh Government. At best, not taking action will delay the transition to a low carbon economy.

“We need a consistent approach not stop start, cliff edge ways of working. If Government doesn’t get involved, the transition will take a lot longer.” [guest speaker, Llandudno]

Perhaps more likely, given the lack of engagement among consumers, and the current trajectory of energy policy being set by Westminster, the transition will never be completed.

“The current UK strategy is driving investment towards offshore wind, nuclear, and shale gas. It’s driving investors to projects at scale.” [guest speaker, Aberystwyth]

“WG needs to be allowing commercial/community energy sectors to do their thing within a supportive framework, not one that is decided in London, one that we have full control of.” [delegate, Cardiff]

Rather than the simple concern that Wales might be left behind by developments in England, the case for action seems to be that without it, the assets which Wales already holds will not be harnessed and used to build a different, and more sustainable, energy system for the future. For some delegates, doing that could even involve the Welsh Government setting up an energy services company – just not an energy supply company.

4. Priorities for the Welsh Government

Inherent in the Energy Company Recommendation is a question about what purposes such a company should serve. This question was raised by many delegates at the exploration events, as reported above, when they emphasised that a single energy company could not fulfil all the purposes which had been associated with it in the Committee's Report: the first task of Government should be to be clear on what they wanted such a company to do. The question was also explicit in the design of the series of exploration events, which were required to look at the wider role for Government in supporting the transition to a low carbon energy system, within which the Energy Company Recommendation should be considered.

Accordingly, delegates at the events were all asked to state their views on which of a range of possible areas of activity Government should prioritise for advancing the low carbon transition. Delegates were given six possible areas of activity, and asked to rank them in terms of the level of priority they felt the Welsh Government should attach to each. The results of this exercise aggregated across the three events (and where '1' equated to the highest, or first, priority) were as follows:

Priority	Item	1	2	3	4	5	6	Mean	[n]
1	Trechu tloedi tanwydd / Tackle fuel poverty	8	12	6	3	3	1	2.52	33
2	Ynni adnewyddadwy / Renewable energy	7	7	9	4	3	2	2.84	32
3	Ynni carbon isel / Low carbon energy	7	7	7	5	4	3	3.03	33
4	Cynhyrchiant a perchnogaeth gymunedol / Community generation and ownership	2	7	5	10	5	4	3.64	33
5	Biliau rhatach i bawb / Cheaper bills for all	4	1	2	5	4	13	4.48	29
6	Cynnwys busnesau / Engaging businesses	0	3	1	6	11	9	4.73	30

In addition to ranking the six areas of activity, delegates were invited to add 'Other' areas for action, using the Meeting Sphere tool. The three top ranking 'Others' were:

- i) Sustainability / Sustainable Energy
- ii) Demand / Demand Management
- iii) Local Economy

At each of the events, the prioritisation exercise was used to determine the themes for a set of table discussions, in small groups. 4 or 5 such tables were convened at each event, and delegates explored the 'priority' theme set for that table. Their suggestions for actions Government should be leading on in each area went far wider than an energy company (although some felt that an energy company, though not a domestic supply company, could be part of the solution in the area they were addressing). Delegates' suggestions for Government action are summarised in the following section on ways forward.

5. Ways Forward

The suggestions below for roles and activities to be undertaken by the Welsh Government were made by delegates and speakers, in the process of identifying the purposes underpinning the Recommendation, and in exploring other ways than an energy supply company of moving those purposes forward. Many of these suggestions resulted from delegates' table discussions.

One overarching suggestion was for more events like the ones convened here to explore the Energy Company Recommendation [see final point below on 'Companies and Conversations']. These delegates felt that it was only through these kinds of co-convened sense making events that shared purposes and pathways for advancing the transition to a low carbon energy system could be identified. In that sense, the suggested ways forward below represent starting points for pursuing the wider energy transition conversation.

5.1 Gaps and Cracks

While setting up an energy supply company was not felt to be the right answer for Government, there was widespread agreement that doing nothing was not an option – simply because the Government's more prosocial aims for the energy system would not be achieved if they were left to the private sector alone. Delegates following this line of thinking argued that the proper role for Government was to correct market failures, or in other words, fill gaps where others in the market are not acting in pursuit of prosocial objectives (especially tackling fuel poverty, or advancing community and renewable generation).

"The most useful role for Government is filling in the gaps, linking things up in places where existing entities don't. Supporting things which wouldn't happen naturally. For instance:

- linking up local demand and supply*
 - decentralised energy and private wires."*
- [guest speaker, Llandudno]

"If there is no intervention - the 'right thing' wouldn't happen." [delegates, Llandudno]

"What areas provide the greatest benefits, that are not already provided well enough by the private sector?" [delegate, Cardiff]

"Whatever model is adopted, 2 areas to focus on are: 1) tackling market failure (e.g. wholesale electricity price is not sufficient to incentivise new low carbon generation, energy efficiency is not incentivised by standard supply model) 2) Using a not-for-profit social enterprise structure to trade in viable markets (e.g. direct supply from on-site renewables) with the aim of putting the profits back into fuel poverty and carbon reduction." [delegate, Cardiff]

5.2 Community Energy and Local Generation/Use

One of the key gaps (or market failures) was perceived to be between local production and local consumption – put simply, that local communities tend not to be able to consume locally-generated energy. Here it was felt the priority should be to bring production and consumption closer together: literally (eg. through microgrids and private wire solutions) or metaphorically (eg. through new ways of packaging and buying community energy, through the grid). However, closing this gap was felt to be easier said than done, and few universal solutions were readily identified. This in itself argued that the priority role for Government should be to convene the relevant stakeholders together to find workable solutions, varying according to locality.

“Match local demand and supply, bring them closer together. This would be good for DNOs, for the Grid, and for communities.” [guest speaker, Aberystwyth]

“Unravel the complexities of enabling local supply to be truly consumed locally... and then support more local renewables.” [delegates, Cardiff]

“GTs, DNOs and their charging model as it stands are certainly a barrier to decarbonising/ decosting how energy is delivered. Good to hear that Ofgem are looking to revise these.” [delegate, Cardiff]

“The key question is how to set a charging policy that reflects the costs of the distribution system, and captures the value of this to ‘energy islands’ that occasionally tap into this. A new model is needed: charge by bandwidth not download?” [guest speaker, Cardiff]

“Not just giving money makes the difference. It’s the community spirit and surrounding wellbeing that makes it work. Achievements breed further achievements to encourage others to develop further drivers.” [delegate, Cardiff]

“Instead of an energy company for Wales, are we moving towards recognition that local priorities will require much more local solutions?” [delegate, Cardiff]

“What the sector needs is multiple community business models, not one mechanism to sell energy into.” [guest speaker, Cardiff]

5.3 Decarbonisation, Renewable Energy, and Heat

A further area of activity in which Government could counteract market failures would be by supporting low carbon production and community energy projects, including by underwriting them or providing seed funding. In this model, the Welsh Government would not enter the commercial marketplace itself (as it would have to in the energy supply company model) but would support those organisations and communities who wished to do so, as a means of advancing the Government’s energy transition objectives. Heat was identified by several delegates as one area where this kind of support would be particularly appropriate, or where the Welsh Government may wish to set up a company of its own, given that the government estate already owns many of the generation assets, and a company could be set up without having to secure a licence, as would be the case for an electricity company.

“There’s a chance to drive decarbonisation through local production.” [guest speaker, Llandudno]

“Perhaps a ‘not for profit’ type body could be set up - it could have strong branding and act predominantly as a developer of renewable energy projects and a mechanism for raising finance from local communities etc. This could take on the role of projects like Bethesda and link local supply to local use, working with licensed suppliers - with a focus on demand management and ‘cheaper power’, hence tackling fuel poverty.” [delegate, Cardiff]

“De-risk the process by form of a guarantee / underwriting projects... for an equity share?” [delegates, Llandudno]

“A revolving fund that could be created to support renewable projects, to help with approval for example in local authorities.” [delegates, Llandudno]

“Heat - as an unregulated utility - is a great place for a prospective utility company to learn. Get all the ‘operational capabilities’ sorted on a small island scheme or three, then add ‘regulatory expense’ of selling electricity/gas at a later date.” [delegate, Cardiff]

“Could use heat as a starting point as not yet regulated and then get step change to other energy.” [delegate, Cardiff]

5.4 Energy Efficiency and Demand Reduction

A popular refrain in delegates’ conversations was that steps should be taken to decrease energy use, and that this should be done first, before any action to change the energy mix, for example. Again, this was seen as a classic market failure, where any organisation operating in the commercial marketplace would have a vested interest in seeing overall energy use increase – in opposition to the need for a low carbon transition. Demand reduction however takes diverse forms (from technological innovation, through retrofitting properties, to individual and household behaviour change). Delegates’ widespread priorities for demand reduction activities suggest this is another area where further cross-sector conversations should be pursued.

“It is essential that any Welsh supply company does not inadvertently promote energy use by making energy cheaper. Focus should be on energy efficiency hand in hand with any change in energy costs.” [delegate, Llandudno]

“Problems with retrofit - already an industry with trust issues because so little good practice but this has to be addressed (ie energy efficiency/demand reduction) before supply. Sequencing is important and needs to be a strategic approach across all WFGA areas.” [delegate, Cardiff]

“Encourage industrial commercial and domestic customers to reduce energy consumption using existing demand side reduction techniques.” [delegate, Llandudno]

“How many of the objectives being put forward here could be achieved by adding to the remit of Welsh Government Warm Homes / Nest - particularly helping customers with their bills?” [delegate, Cardiff]

“Existing EE schemes are pretty effective, a new company unlikely to add value. Especially an ESCO.” [delegate, Cardiff]

5.5 Tackling Fuel Poverty

At each event, tackling fuel poverty was voted as the highest priority area for the Welsh Government to lead in. This breadth of support was also reflected in the strength of opinion with which delegates called for action in this area – some feeling that the first action for Government should be to deliver on its previous commitments. The prevalence of fuel poverty was seen as another example of market failure, but delegates’ suggestions were also underpinned by social justice concerns. Fuel poverty was seen as core business for the whole of Government, not just an energy issue: tackling fuel poverty would be critical to delivering on the Wellbeing of Future Generations Act.

“The energy company recommendation is a total red herring... and the government know it. The Government once had the ambition ‘to end fuel poverty’. Where’s that gone? The fuel poverty task force has been disbanded, and it isn’t even an indicator in the WFG Act.” [delegate, Llandudno]

“Most important objective is to get people off prepayment meters in Wales.” [delegate, Llandudno]

“Smart vend data still very underdeveloped - even by companies that have millions of customers. Would take very long time for a WG ESCO to catch up with customer numbers, and potential of data.” [delegate, Cardiff]

“Tackle the cross department tension between housing, social care and health and energy.” [delegate, Llandudno]

“Fuel poverty needs to be tackled as part of tackling poverty.” [delegate, Cardiff]

5.6 Consumers and Citizens

Many delegates felt that the voice and role of the citizen was missing from the energy transition debate. In part this reflects delegates’ social justice concerns (eg. as expressed in their prioritisation of tackling fuel poverty). It also reflects their perception of a largescale market failure, whereby commercial operators tend to put profits ahead of people. On a deeper level still, comments in this space underline the recognition common to many delegates that energy is a socio-technical system, in which patterns of energy production and use are bound up in (or even dictated by) the social practices which make up everyday life. Overlooking the householder (or consumer-as-citizen) along the pathway to a low carbon transition would ensure not only that social inequalities would go uncorrected, but that the design of the emergent low carbon energy system itself would be deeply flawed. Such points were made both in abstract terms (ie. at the level of the whole energy system) and with reference to the experience of running energy companies, especially at community level.

“Technically it’s an easy project – it’s the customers and other stakeholders that are the challenge.” [guest speaker, Llandudno]

“Whatever is created should be built around consumer need and an understanding of consumer motivations.” [delegate, Cardiff]

“People are being ‘done to’ not seen as citizens with agency, a sense of belonging, relationships with others etc. Look at the smart meter roll out. The State could capitalise on its honest broker role in terms of this, for example through education on local balancing, or energy efficiency - instead of energy companies treating people only as consumers.” [guest speaker, Cardiff]

5.7 Leading and Convening

One of the key roles that delegates from all sectors ascribed to Government was the need to provide leadership. For some this meant laying down clear guidelines on what kinds of development were to be approved and supported; for others it meant bringing multiple actors together around a well-defined sense of direction (for example an ‘energy pathway’). Importantly, delegates from the wider sector were in agreement with those from the public sector that government cannot and should not do everything. In each instance, the first task is to convene interested parties and establish who is best placed to do what; throughout the events, examples were found where private sector organisations were undertaking work which would advance the Government’s objectives (eg. supporting energy transitions among businesses) or likewise where the community energy sector, or local government, would be best placed to act (particularly where they owned or controlled energy assets). Amidst these diverse areas of activity, most delegates felt the Welsh Government should play a central role in setting the direction and bringing actors together, by leveraging its unique convening power. This was felt to be core business for government – in fact, perhaps this is what it means to ‘govern’ a complex system.

“Setting up an energy company is hard – it requires innovation. It may be better for central Government to act as facilitator, and be there to guarantee its objectives are met.” [guest speaker, Aberystwyth]

“The Welsh Government doesn’t have to do everything. They should align the organisations around the room and ask ‘who’s going to put what in?’” [guest speaker, Cardiff]

“Bring the resources across Wales together (not necessarily through a company) in a facilitation role.” [delegate, Cardiff]

“Government should give us certainty so we know where to invest.” [guest speaker, Llandudno]

5.8 Companies and Conversations

The final theme arising from delegates’ conversations about the role of Welsh Government in the low carbon transition was one that encapsulated all of the other themes, set out above. For some delegates, this bringing together of multiple strands of activity suggested that, in the final analysis, an energy services company could be an effective delivery vehicle to advance the low carbon transition. Whether or not a company would need forming as an extension of Government was a question which invites further exploration. But the overriding point here was that, whatever is done, it needs to be done in co-ordination, such that the priorities above can be addressed in combination. Breaking the energy system down into separate areas is necessary, to identify actions within each, and to prioritise between them (as delegates were asked to do at the exploration events). But delegates were keen to underline the interconnections and feedbacks between the different parts of the system; a fragmented approach will not advance the transition required (in a simple example, carbon savings in generation could be undone by increases in consumption). It was observed by some delegates that it is the tendency of the energy sector to work in silos; perhaps the Welsh Government is uniquely placed in being able to take a whole system view, and ensure that actions in one area correspond to actions in another.

“WG should form a not for profit supplier acting as a long term delivery vehicle for wider objectives.” [delegate, Cardiff]

“Our experience goes beyond a ‘simple’ supply offer – there are other ways to be a company.” [guest speaker, Cardiff]

“We need to have a system wide look – including heat and buildings and not just electricity and gas.” [guest speaker, Cardiff]

“Treating energy as a larger strategic area in a holistic approach. Not narrowing it down to one issue.” [delegate, Cardiff]

“More holistic energy strategy, rather than all eggs in basket of an ESCO.” [delegate, Cardiff]

“Welsh Government can influence procurement - WFG act for public sector.” [delegate, Cardiff]

“Embed the ‘Future Generations’ approach to bring everything together. We need to get out of our silos - so do more of this type of session.” [delegates, Cardiff]

“The role of the Government should be to convene, enable and steer the market to respond to pressing challenges. You don’t want to be part of the problem – which you will be if you become a supplier – you want to be part of the solution.” [guest speaker, Cardiff]

Annex i) Attendees & Speakers

Across the three events, a total of 135 delegates attended the events. That total number includes members of the project team (a maximum of 6 in each of the locations - comprising WG and WCVA staff, plus Andrew Darnton (AD Research & Analysis) and Steve Bather (Meeting Sphere)) and the guest speakers for each event (5 in Aberystwyth and Llandudno, 8 in Cardiff). Note that this final total includes some double counting as several of the delegates (including the project team, and guest speakers) attended more than one (or all) of the events – separate numbers for each event are stated below.

Of the total number of registered delegates, 134 gave permission for their details to be shared. These delegates' names and details appear in the three lists below, along with the names of the guest speakers at each event.

i) **Aberystwyth** [29 registered attendees; 21 consenting to share details]

Guest Speakers (5)

- Nicola Rylett (Amber Energy)
- Chris Blake (Community Energy Wales/Green Valleys)
- Joanne Ragdale (Good Energy)
- Michael Jenkins (Bridgend CBC)
- Mark Bramah (Robin Hood Energy)

Enw/Name	Mudiad/Organisation
Amanda Biss	Egnida Limited
Glenn Bowen	Canolfan Cydweithredol Cymru Wales Co-operative Centre
Paul Burrell	Ymddiriedolaeth Arbed Ynni Energy Saving Trust
Judith Cook	Oren Associates
Andrew Darnton	AD Research & Analysis
Keith Davies	Cyfoeth Naturiol Cymru Natural Resources Wales
Kendal Davies	Cyngor Sir Gâr Carmarthenshire County Council
Prys Davies	Llywodraeth Cymru Welsh Government
Graeme Lane	Cyngor Sir Ceredigion Ceredigion County Council
Huw Lewis	Llywodraeth Cymru Welsh Government
Glyn Mountford	Re:fit Cymru
Lia Murphy	Ofgem
Grant Peisley	DEG - Datblygiadau Egni Gwledig
Jennifer Pride	Llywodraeth Cymru Welsh Government
Gareth Richards	Cyngor Sir Powys Powys County Council
Clare Sain-ley-Berry	WCVA
Simon Thomas	Cynulliad Cenedlaethol National Assembly Member

Gaynor Toft	Cyngor Sir Ceredigion Ceredigion County Council
Ally Wadeward	Ymddiriedolaeth Arbed Ynni Energy Saving Trust
Steve Woosey	North Wales Energy Advice Centre

ii) **Llandudno** [33 registered attendees; 30 consenting to share details]

Guest Speakers (5)

- Andy Burgess (Ofgem)
- Joanne Ragdale (Good Energy)
- Rhys Horan (Local Partnerships)
- Keith Jones (CEW/National Trust)
- Mark Bramah (Robin Hood Energy)

Enw/Name	Mudiad/Organisation
Amanda Biss	Egnida Limited
Phil Brennan	APSE Energy
Judith Cook	Oren Associates
Heledd Cressey	Llywodraeth Cymru Welsh Government
Andrew Darnton	AD Research & Analysis
Dewi Llwyd Evans	Grŵp Cynefin
Ian Griffith	Llywodraeth Cymru Welsh Government
Jim Hall	Vital Energi Utilities Ltd
Danny Hirst	Utiligroup
Keith Jones	Ynni Cymunedol Cymru Community Energy Wales
Robert Jones	Cyngor Sir Ddinbych Denbighshire County Council
Leanna Jones	Cyngor Sir y Fflint Flintshire County Council
Crispin Jones	E.ON UK
Silas Jones	Cadwyn Clwyd
Ffion Mai Jones	Cyngor Gwynedd Gwynedd Council
John Jones	CTC PAC
Colin Keyse	Cwm Harry Land Trust
Huw Lewis	Llywodraeth Cymru Welsh Government

Enw/Name	Mudiad/Organisation
Philip Morris	Heddlu Gogledd Cymru North Wales Police
Kirsty Owen	Llywodraeth Cymru Welsh Government
Ian Pomeroy	Cyngor Bwrdeistref Sirol Conwy Conwy County Borough Council
Anna Pretious	Heddlu Gogledd Cymru North Wales Police
Jennifer Pride	Llywodraeth Cymru Welsh Government
Paula Roberts	Prifysgol Bangor / Ynni Padrn Peris
Rachel Shorney	SP Energy Networks
Sadie Smith	Cyngor Sir y Fflint Flintshire County Council
Stephen Stewart	SP Energy Networks
Jonathan Townend	Oren Associates
Dafydd Watts	Ymddiriedolaeth Arbed Ynni Energy Saving Trust
Emma Williams	Cyngor Bwrdeistref Sirol Wrecsam Wrexham County Borough Council

iii) **Cardiff** [96 registered attendees; 83 consenting to share details]

Guest Speakers (8)

- Pamela Taylor (Ofgem)
- Joanne Ragdale (Good Energy)
- Adam Boorman (Cornwall)
- Nicola Rylett (Amber Energy)
- Mike Jenkins (Bridgend CBC)
- Simon Roberts (CSE)
- Rob Proctor (CEW)
- Mark Bramah (Robin Hood Energy)

Enw/Name	Mudiad/Organisation
Muditha Abeysekera	Prifysgol Caerdydd Cardiff University
Joseph Allen	Invicta Public Affairs
Jon Arroyo	Cyngor Bwrdeistref Sirol Rhondda Cynon Taf Rhondda Cynon Taf CBC
Mari Arthur	Cynnal Cymru - Sustain Wales
Jo Atkinson	Carbon Trust
Kalpana Balakrishnam	Cyfoeth Naturiol Cymru Natural Resources Wales
Jenifer Baxter	Institution of Mechanical Engineers
Alex Belsham-Harris	Citizens Advice
Heidi Beverstock	Cymdeithas Tai Taf Taff Housing Association
Amanda Biss	Egnida Limited
David Bolton	Melin
Oliver Buxton	Seren Energy Ltd
Steven Carpenter	Llywodraeth Cymru - Cymru Effeithlon Welsh Government - Resource Efficient Wales
Allison Cawley	Melin
Robert Clark	Greenfield Nordic Ltd
Judith Cook	Oren Associates
Chloe Corbyn	Cynulliad Cenedlaethol Cymru National Assembly for Wales
Marko Cosic	COHEAT Ltd

Enw/Name	Mudiad/Organisation
Jonathan Cosson	Cymru Gynnes Warm Wales
Andrew Darnton	AD Research & Analysis
Prys Davies	Llywodraeth Cymru Welsh Government
Vicky Davies	Llywodraeth Cymru Welsh Government
Catrin Davies	Plaid Cymru, Cynulliad Cenedlaethol Cymru National Assembly for Wales
Nigel Elias	Llywodraeth Cymru Welsh Government
Paul Elliott	CCHA
Lee Evans	Sustainable Energy
Martin Evans	Utiligroup
Annie Faulder	MME Ltd
Nikki Fitzgerald	Llywodraeth Cymru Welsh Government
Rachael Friel	Quatro PR
Charlotte Gibson	Llywodraeth Cymru Welsh Government
Ryan Goddard	Welsh Power
Simon Griffiths	Llywodraeth Cymru Welsh Government
Benjamin Hanks	Cyngor Dinas Casnewydd Newport City Council
Gareth Harcombe	Cyngor Dinas Caerdydd City of Cardiff Council
Patrick Holcroft	Dinas a Sir Abertawe Swansea Council
Melissa Johansson	Geode-Energy
Sue John	Cyngor Bwrdeisdref Sirol Blaenau Gwent Blaenau Gwent CBC
Matthew John	Tai Calon Community Housing
Alun Jones	Buddsoddiad Cymdeithasol Cymru Social Investment Cymru
Shea Jones	Sefydliad Materion Cymreig Institute of Welsh Affairs
Crispin Jones	E.ON UK
Lee Jones	Cymdeithas Tai Merthyr Tudful Merthyr Tydfil Housing Association

Enw/Name	Mudiad/Organisation
Ian Knight	Prifysgol Caerdydd Cardiff University
Eleanor Knight	Llywodraeth Cymru Welsh Government
Keryl Lanfear	Cyngor Bwrdeistref Sirol Rhondda Cynon Taf Rhondda Cynon Taf CBC
Karen Lewis	Canolfan Cydweithredol Cymru Wales Co-operative Centre
Huw Lewis	Llywodraeth Cymru Welsh Government
Neil Lewis	Robert Owen Community Banking Fund
David Llewellyn	Blaengad
Ron Loveland	Llywodraeth Cymru Welsh Government
Simone Lowthe Thomas	Asiantaeth Ynni Severn Wye Severn Wye Energy Agency
Catrin Maby	Rickaby Thompson Associates
Judith Marquand	Prifysgol Caerdydd Cardiff University
David Marquand	Prifysgol Caerdydd Cardiff University
Richard Martin	Prifysgol Caerdydd Cardiff University
Anna McMorrin	Invicta Public Affairs
Tim Melville	Empower Community
Alex Meredith	Innogy
Nick Miller	Miller Research (UK) Ltd
Margaret Minhinnick	Cymru Gynhaliol Sustainable Wales
Glyn Mountford	Re:fit Cymru
Guto Owen	Ynni Glan
Andrew Padmore	Egnida Limited
Mark Phillips	Newport City Homes
Mark Picton	RWE
Julian Preece	Cyngor Sir Powys Powys County Council
Oriel Price	Bwrdd Iechyd Addysgu Powys Powys Teaching Health Board
Jennifer Pride	Llywodraeth Cymru Welsh Government

Enw/Name	Mudiad/Organisation
Alex Rawlin	Llywodraeth Cymru Welsh Government
Andy Regan	Citizens Advice
Simon Roberts	Centre for Sustainable Energy
Natalie Robinson	E.ON
Neville Rookes	CLILC / WLGA
Stefan Runge	Prifysgol Caerdydd Cardiff University
Hugh Russell	Cartrefi Cymunedol Cymru Community Housing Cymru
Paul Smith	Energy Saving Trust
Dave Stacey	Planet 3 Energy
David Thomas	Savills
Jonathan Townend	Oren Associates
Gareth Tucker	Seren Energy
Kim Wain	Planet 3 Energy
Dan Ward	Freelance

Annex ii) Event Agenda

[time]	[activity]	[inputs/outputs]
10:30	<ul style="list-style-type: none"> Arrival, refreshments 	
11:00	<p>Welcome & Ice Breaker</p> <ul style="list-style-type: none"> Welcome [AD] Housekeeping & Translation [CSB] Agenda [AD] Use of technology [SB] 'We three kings' exercise 	<ul style="list-style-type: none"> 3 kings exercise: what gifts do you bring? Enter this on Meeting Sphere [visible to all] How did you find the process? [give further guidance on using the technology]
11:20	<p>WG presentation [Prys Davies]</p> <ul style="list-style-type: none"> WG Energy Policy Context WA Energy Company Recommendation Other WG Energy Activity (Clarifications) 	<ul style="list-style-type: none"> Clarifications [out loud] Initial reactions via Meeting Sphere [notetaking by AD/WCVA]
12:00	<p>Guest Speaker Inputs Part 1</p> <ul style="list-style-type: none"> Pamela Taylor (Ofgem) Joanne Ragdale (Good Energy) Andy Boorman (Cornwall Energy) Nicola Rylett (Amber Energy) 	<ul style="list-style-type: none"> Questions and Reflections via Meeting Sphere – by speaker; at end of cycle [notetaking by AD/WCVA]
13:00	LUNCH	<i>AD to cluster Questions and Reflections</i>
13:45	<p>Guest Speaker Inputs Part 2</p> <ul style="list-style-type: none"> Mike Jenkins (Bridgend CBC) Simon Roberts (CSE) Rob Proctor (CEW) Mark Bramah (Robin Hood Energy) 	<ul style="list-style-type: none"> Questions and Reflections via Meeting Sphere – by speaker; at end of cycle [notetaking by AD/WCVA]
14:30	<p>Guest Speaker Panel Discussion</p> <ul style="list-style-type: none"> AD to chair, with themes from Meeting Sphere 	<ul style="list-style-type: none"> Further Questions and Reflections via Meeting Sphere [notetaking by AD/WCVA]
14:50	<p>Interactive Exercise #1</p> <p>a) Plenary PRE Question: Should the WG lead in the development of an all-Wales (not for profit) energy supply company? [Y/N/Maybe]</p> <p>b) Plenary Question: (An all-Wales energy supply</p>	<ul style="list-style-type: none"> Live vote by Meeting Sphere [don't report Pre Result] Vote to determine

	<p>company could serve a number of purposes). Which of these purposes would you prioritise as a job for WG?</p> <p>[prompt with rankings: low carbon energy; cheaper bills for all; tackle fuel poverty; renewable energy; community generation / ownership; engaging businesses; other]</p>	<p>number/themes of tables</p> <ul style="list-style-type: none"> • AD announces result, expressed as themes for each of the 4 table discussions • People then choose which table to sit on (whatever their vote)
15:00	<p>Table Discussion</p> <p>Five tables resulted:</p> <ul style="list-style-type: none"> - fuel poverty (2 tables) - renewable energy - low carbon energy - cheaper energy bills <p>Each table addressed 3 questions:</p> <p>i) Why should this purpose be a priority for WG?</p> <p>ii) What are the pros, cons, and practicalities for WG of advancing this priority through an energy company?</p> <p>iii) What other ways might there be for WG to advance this priority – and relative to an energy company?</p>	<ul style="list-style-type: none"> • Capture key points with Meeting Sphere, and at end of each question/section • Table facilitator to keep time, and help reach conclusions in each section
15:40	<p>Feedback from Tables</p> <ul style="list-style-type: none"> • Where did your table get to by the end of the time available for this discussion? 	<ul style="list-style-type: none"> • Spokesperson to report back, while reviewing Meeting Sphere comments • [notetaking by AD/WCVA]
15:50	<p>Interactive Exercise #2</p> <ul style="list-style-type: none"> • Plenary POST Question: Should the WG lead in the development of an all-Wales (not for profit) energy supply company? [Y/N/Maybe] • AND IF YES, please explain what kind of energy supply company you have in mind. 	<ul style="list-style-type: none"> • Live vote by Meeting Sphere [this time, report Result] • Then those who voted YES write in their specific suggestion
15:55	<p>Summing Up</p> <ul style="list-style-type: none"> • Thanks and Next Steps (PD) 	
16:00	CLOSE	