

Carbon Pricing for a Sustainable Economy

Conference Proceedings

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About the Pembina Institute

The Pembina Institute creates sustainable energy solutions through research, education, consulting and advocacy. It promotes environmental, social and economic sustainability in the public interest by developing practical solutions for communities, individuals, governments and businesses. The Pembina Institute provides policy research leadership and education on climate change, energy issues, green economics, energy efficiency and conservation, renewable energy and environmental governance. More information about the Pembina Institute is available at <http://www.pembina.org> or by contacting info@pembina.org.

Carbon Pricing for a Sustainable Economy

Conference Proceedings

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Executive Summary

The Pembina Institute identified the fall of 2007 as an opportune moment to assemble a wide range of experts and practitioners for an intensive workshop with the goals of (a) highlighting and sharing cutting-edge thinking on carbon pricing tools, and (b) vetting and refining concrete design proposals that could form the basis for future policy.

About one hundred participants from a broad range of industry, government, ENGO, media and academic sectors took part, bringing their expertise as professionals, interests as stakeholders and problem-solving skills to the table.

The forum provided a unique opportunity for participants with a diversity of backgrounds and experience to share ideas, collaborate, and benchmark their thinking against a wide spectrum of leading perspectives on carbon pricing policy.

Workshop sessions were held over two half-days, on October 29 and 30, 2007. Three questions were chosen to focus and streamline the discussion:

- What criteria should be used to evaluate the effectiveness of carbon pricing policies?
- What are the optimal tools for setting a price level – taxes, cap-and-trade systems or a combination of the two?
- What are the optimal modalities for using, or “recycling”, government revenues, if any, collected from carbon pricing?

Marlo Reynolds, Executive Director of the Pembina Institute, and Rob Abbott, Sustainability Practice Leader at Deloitte, co-facilitated the workshop.

Key outcomes included:

- Newly identified areas of potential common ground with respect to each of the three guiding questions (see selected excerpts in Table 1);
- Strong interest in continuing the discussion, including by collaborating on more detailed policy design work; and
- Strong interest in informing policymakers of the workshop outcomes, noting the high degree of participant engagement in the various sessions.

Table 1. Potential Areas of Common Ground – Excerpts from the Proceedings

Guiding Question	Potential Areas of Common Ground (Recommended for further research and discussion)	Details on
Policy Evaluation Criteria	— A simple hierarchy of criteria, assigning <i>“highest priority to the feasibility of implementation, which is in turn based on two factors: (a) the likely environmental effects and (b) the likely financial effects of a given policy.”</i>	Pages 10-13
Revenue Recycling Options	— A proposal to, <i>“first, and in the short-term, recycle revenues through spending on additional emissions reductions; second, and in the medium-term, once cost-effective reduction options are exhausted, recycle revenues through broad-based tax reductions; finally, in the long-term, if emissions reduction and tax shifting opportunities are both exhausted, use revenues to finance public debt reduction”</i>	Pages 13-16
Tools for Price Setting	— A hybrid system, <i>“combining both a carbon tax [on consumption of fossil fuels] and a cap-and-trade system [for larger emitters]”</i>	Pages 16-19

Introduction

The forum, *Carbon Pricing for a Sustainable Economy*, was conceived based on an understanding that:

- Carbon pricing is an emerging policy domain of critical importance to climate action in Canada;
- Effective policy solutions are still under development and, in particular, the relative advantages and disadvantages of different options remain subject to research, debate and learning;
- The complexity of the topic demands that multiple types of expertise be brought to bear in policy design and implementation;
- Broad-based stakeholder participation and buy-in during the design process is likely to enhance the quality of policy and the effectiveness of implementation.

The Pembina Institute identified late 2007¹ as an opportune moment to assemble a wide range of experts and practitioners in an intensive, *charrette*-style workshop with the goals of (a) highlighting and sharing cutting-edge thinking on carbon pricing options, and (b) vetting and refining concrete design proposals that could form the basis for future policy.

Participants were invited to contribute their expertise as professionals, interests as stakeholders, problem-solving skills, and convictions as individuals.

The forum was held over two half-days, on October 29 and 30, 2007. Three key questions were chosen to focus and streamline the discussion:

- What criteria should be used to evaluate the effectiveness of carbon pricing policies?
- What are the optimal tools for setting a price level – taxes, cap-and-trade systems or a combination of the two?
- What are the optimal modalities for using, or “recycling”, government revenues, if any, collected from carbon pricing?

Dedicated working sessions were set up to address each question and designed so as to allow participants to work through a series of steps:

- **Propose** an initial set of “straw dog” solutions
- **React** to the options on the table
- **Synthesize** recurrent themes and cross-cutting issues from the discussion

¹ A 2007 TD Economics Report, *Market-based Solutions to Protect the Environment*, exemplified the erstwhile “buzz” on carbon pricing policy. In addition, several policy proposals had set benchmarks pointing Canada in the direction of some form of carbon price. These included Alberta’s new greenhouse gas regulations (considered by many as effectively imposing a carbon tax in the short-term), use of a “Green Investment Account” as part of Stéphane Dion’s proposed industrial emitters’ regulation, and “fee-bate” programs for vehicles, announced as part of the 2007 federal budget. Since the conference, further policies have emerged, including British Columbia’s carbon tax, which takes effect on July 1, 2008.

— **Identify potential common ground** for next steps

Emphasis was placed on open and frank discussion among participants, information exchange, idea generation and shared learning as a group.²

This document provides notes covering the three working sessions, as well as a rapporteur's record of the opening and closing plenaries and a summary of the conference's "conversation café" tables (in which small groups focused on a variety of specific design questions for one hour).

The complete conference record includes a series of additional supporting documents, some of which are included as appendices:

- The **conference agenda** outlines the flow of plenary and small-group sessions (included as Appendix A).
 - The **participants' list** introduces the roughly one hundred participants, facilitators and organizers from a wide range of industry, government, ENGO, media and academic sectors (included as Appendix B).
 - The **Expert Advisory Committee** membership list introduces the fifteen individuals who generously volunteered their time and expertise to help guide the conference design (included as Appendix C).
 - The three-page **conference concept note** outlines the workshop goals, as conceived in early 2007 and distributed alongside invitations to the conference (available for download at www.pembina.org/conference2007).
 - Seven **briefing papers** provide summaries of key technical background information and were distributed to participants before the conference. They include:
 - “State-of-the-debate” summaries for each working session topic –
 - potential criteria for evaluating carbon pricing policies
 - options for revenue recycling
 - comparison of the key price-setting tools: taxes and trading systems
 - Literature reviews of existing research and policy experience –
 - carbon pricing modelling studies undertaken to date in Canada
 - carbon pricing policies implemented to date in Canada
 - significant carbon pricing policies implemented internationally
 - Original discussion documents on emerging issues
 - competitiveness concerns and opportunities related to carbon pricing
- (All seven papers, in complete and summary versions, are available for download at www.pembina.org/conference2007.)

² Although adhering to consistent principles, the specific facilitation structure varied from session to session. For example, in the session on evaluation criteria, straw dog proposals were developed in advance by the Pembina conference team, then refined and vetted by conference participants working in small groups and in plenary. In the sessions on pricing tools and revenue recycling, participants were split into two groups, one per topic, to develop a few straw dog proposals. On the following day, each group looked at the *others'* proposals, offering initial reactions, synthesizing cross-cutting themes and identifying potential next steps.

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- The **conference ground rules** cover suggestions for harmonizing participant expectations, creating a comfortable space for open discussion, and maintaining focus (included as Appendix D).
 - A **participant feedback** overview presents the results of a survey completed at the end of the conference to assess format and outcomes (included as Appendix E).

Conference Proceedings

Opening Plenary

Recognizing that the variety of perspectives represented at the conference could make for challenging conversations, and wanting to encourage all perspectives to be heard, the facilitators opened with a vision for the conference working sessions (see the “ground rules” in Appendix D). In particular, participants were encouraged to begin the forum with divergent, creative, generative thinking on the first day, entering into a necessary “groan zone” of complexity and uncertainty. On the second day, sessions would be focused on identifying common ground, reducing complexity and converging where possible on key themes.

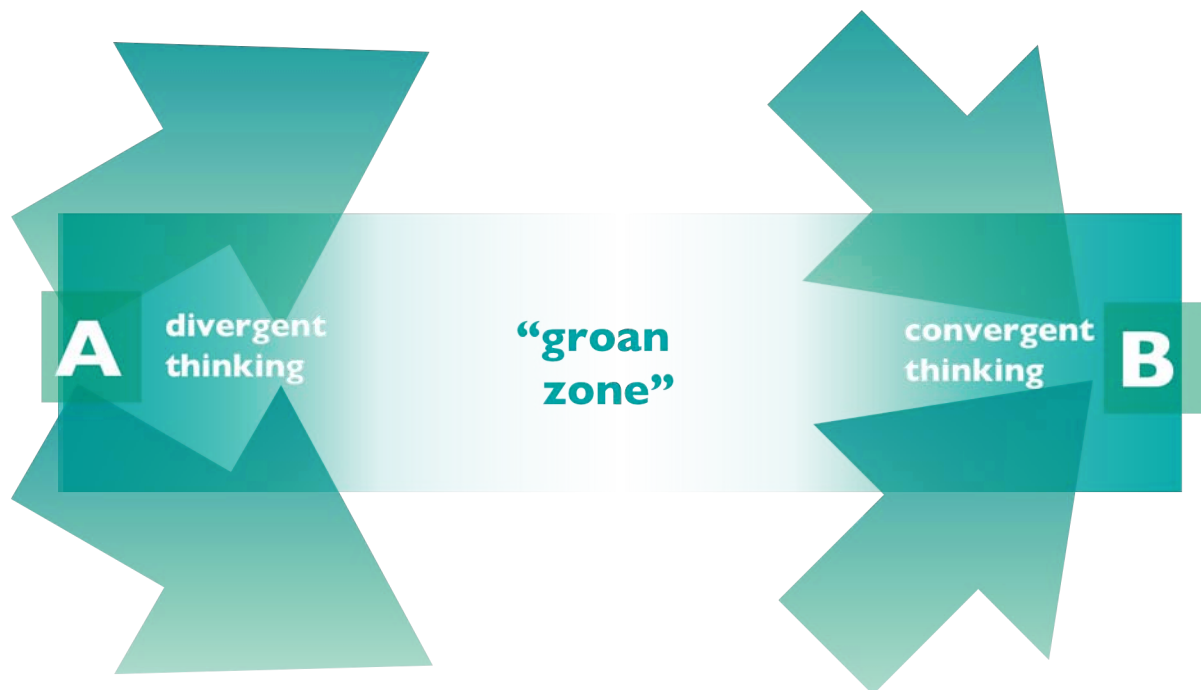


Figure 1. Proposed conference flow

Policy Evaluation Criteria (Working Session 1)

The first working session was dedicated to identifying, streamlining and prioritizing criteria that could be used to evaluate carbon pricing proposals, including those under discussion later in the forum agenda.

The “Straw Dog” Proposal

A draft evaluation framework was proposed by the conference team as part of the advance briefing paper on policy evaluation criteria (available for download at www.pembina.org/conference2007). The framework is outlined in Table 2.

Table 2. Draft Evaluation Framework for Carbon Pricing Policies in Canada

Criteria	Measurement
Environmental effectiveness	<ul style="list-style-type: none"> — Near-term GHG emissions reductions on a scale sufficient to achieve national climate change targets — Individual and corporate behavioural change leading to reductions in emissions — Deployment of low-emission technologies by individuals and industry
Cost effectiveness	<ul style="list-style-type: none"> — Minimization of costs
Competitiveness	<ul style="list-style-type: none"> — Minimization or mitigation of significantly adverse impacts on competitiveness
Fiscal impact	<ul style="list-style-type: none"> — Maintenance of sound fiscal management by governments — Maintenance of revenue neutrality (if this is a goal)
Fairness	<ul style="list-style-type: none"> — Ability to mitigate impacts on low-income earners — Equitable distribution of any cost burdens and/or financial benefits — Fairness between individual and industrial polluters, among industry sectors, and across regions
Administrative simplicity	<ul style="list-style-type: none"> — Minimization of administrative costs
Integration with global climate policy	<ul style="list-style-type: none"> — In a cap-and-trade scenario: ability to link Canadian carbon markets with international markets (i.e. fungibility of Canadian carbon credits) — In a tax scenario: harmonization of Canadian tax rates with those in peer jurisdictions — Consistency with international climate change commitments

Initial Reactions

Participants were organized into groups of about eight to ten and were immediately asked to assign relative weights to each criterion within the framework.

Weights were tallied, averaged and presented back to the plenary to provide a “state-of-the-debate” benchmark as a starting point for further discussion. The results are summarized in Figure 2.

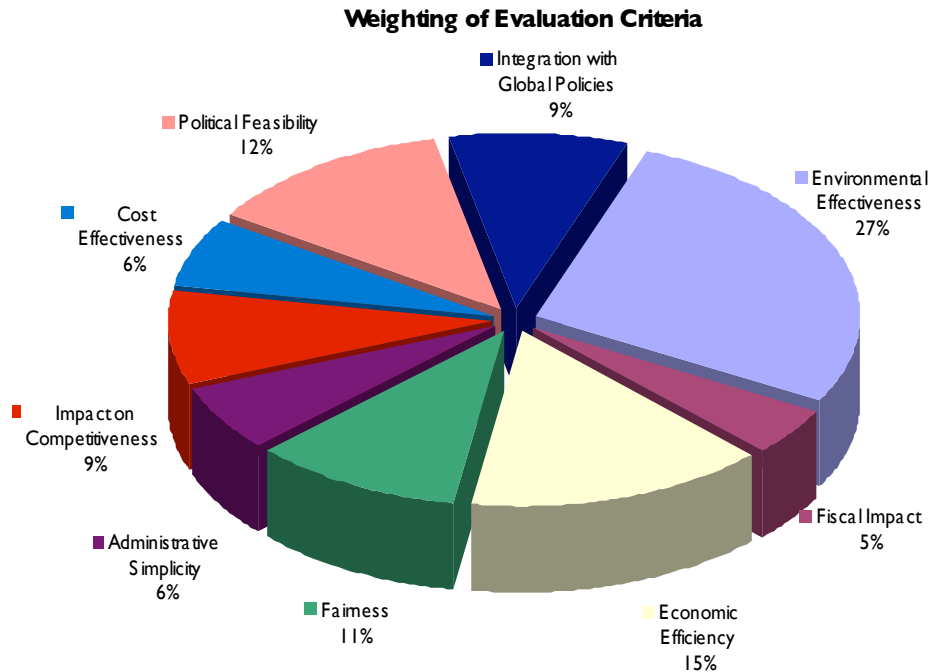


Figure 2. Average weighting of policy evaluation criteria by conference delegates.

A wide variety of points were raised during the group discussions about ranking. These included:

- Fairness and competitiveness may sometimes be at cross-purposes. This depends in part on the question, “fairness to whom?” If fairness criteria over-emphasize consideration for low-income individuals and households, compliance costs for other individuals and businesses could be raised to the point where business competitiveness is adversely affected – and vice versa.
- Political feasibility is always an essential criterion if policies are to be implemented successfully. In the case of climate change policy, public appetite for meaningful action means that governments may have more room to manoeuvre than usual.
- Although an initial focus on regional policy questions may be justifiable (“get your house in order first”), it is critical that domestic policies be designed in the context of international policies and commitments.

Synthesis and Identification of Recurring Themes

The group generally expressed an interest in simplifying the criteria or “paring them down to essentials”. At the same time, several new criteria were identified as important. Commonly cited additions included:

- **Flexibility:** the ability to modify policies in response to changing circumstances. Given the multiple and unusually significant uncertainties in this field, policies are likely to be “imperfect” in their first incarnations and will require continual review and improvement. Provisions for adapting policy need to be built-in from the outset.

- **Certainty / Predictability:** the presence of clarity about policy expectations five or even ten years ahead. Industry and private businesses need to know the parameters of future policy environments in order to plan effectively.
- **Transition readiness:** ease of integration with likely policies in other jurisdictions. Over the long-term, since local, regional and national policies may be subsumed by global policy, early harmonization could offer competitive advantages.
- **Transparency:** clarity about cause and effect. Transparency is especially important for the long-term viability of carbon pricing policies since public acceptance of carbon pricing is likely to be higher if the impacts (e.g. collective shifts in behaviour) can be documented and attributed to specific policies.

Potential Common Ground

Given a widely shared interest in simplifying the “straw dog” framework, the facilitators proposed a modified framework based on their interpretation of the discussion, illustrated in Figure 3. The framework assigns its highest priority to feasibility of implementation, which is in turn based on two factors: (a) the likely environmental effects and (b) the likely financial effects of a given policy.

Policy Evaluation Criteria — version 2.0

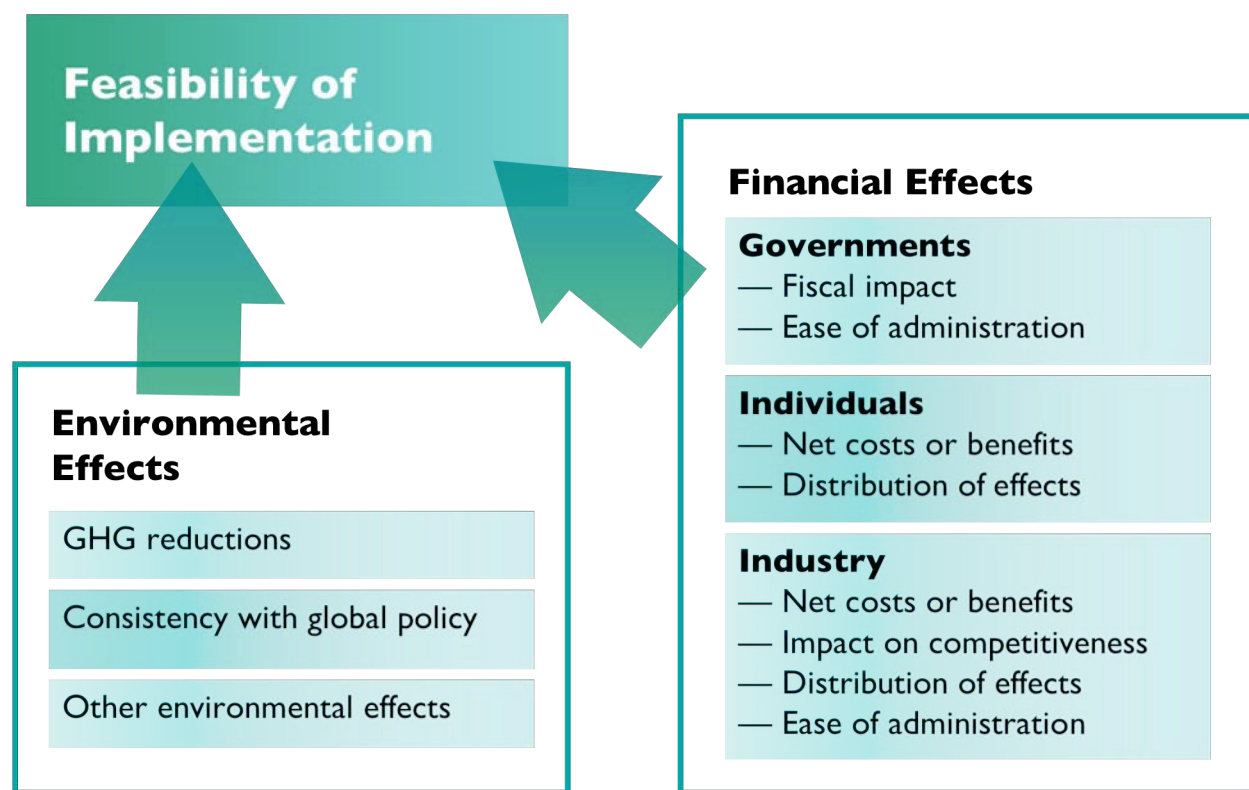


Figure 3. Modified framework for policy evaluation

Although there was interest in this version as an improvement over the initial proposal, there was no opportunity for further discussion or to test for consensus support. Indeed, there was concern in some quarters that newly raised criteria were not adequately accounted for. Further work on this topic was recommended.

Revenue Recycling (Working Sessions 2 / 3, stream ‘A’)

Working sessions 2 and 3 were dedicated to the parallel issues of revenue recycling and tools for price setting – and designed as a “relay”. In working session 2, participants were split into two streams – one was tasked with brainstorming, grouping and selecting a series of “straw dog” policy proposals for recycling, based on their expertise and background provided in briefing papers. The other group tackled the question of tools in a similar format.

The following day, in working session 3, groups switched topics. One group took the others’ revenue recycling proposals and proceeded to react, refine and make recommendations – and vice versa.

In both working sessions, participants initiated discussion in smaller sub-groups of eight to ten (which worked out to three sub-groups per topic), then convened in semi-plenary to share and synthesize results.

The “Straw Dog” Proposals

Three primary proposals emerged from working session 2A on revenue recycling:

1. Use the revenue from a carbon pricing policy for targeted GHG emission reduction efforts. Recycle revenues on a sectoral basis, or through broad-based tools. Examples could include:
 - Investments in low-GHG emitting technologies
 - Programs to encourage homeowners to retrofit their homes
 - Incentives for the deployment of renewable energy

(NB: Some participants suggested targeting funds at those emission reduction options that result in the greatest reduction in emissions, thus making the provisions of funds contingent on performance and ensuring that options that result in the greatest reduction in emissions are supported preferentially.)

2. Use the revenue from a carbon pricing policy to finance reductions in existing taxes. Some participants suggested that this be done in a revenue-neutral manner such that the government does not realize an increase in total revenue.
3. Use the revenue from a carbon price to provide tax incentives for GHG emission reductions. Examples could include:
 - Favourable tax deductions for green technologies
 - GST exemptions on EnergyStar (energy efficient) products

These three options are summarized in Figure 4.

In addition, participants discussed ways in which revenue generated from carbon pricing could be used to fund other government priorities (such as health care, international development, and adaptation to climate change).

Revenue Recycling Options — straw dogs

- 1** Government spending on targeted greenhouse gas mitigation efforts (sectoral or broad-based).
Examples could include:
 - Investments in low-GHG technologies
 - Renewable energy deployment incentives
- 2** Tax system changes to offset the costs of carbon pricing borne by emitters
Further options considered include:
 - Revenue neutrality (total government tax revenues remain constant)
- 3** Tax system changes to achieve further GHG emissions mitigation
- *** Revenue could also be used to explicitly fund other government priorities (health care, adaptation etc.)

Figure 4. Revenue Recycling “straw dog” proposals

Initial Reactions

In working session 3A, participants responded to the first groups’ three “straw dogs” by brainstorming specific ways in which revenues could be recycled, focusing on the first two proposals in particular.

Option 1

Sectoral efforts:

- Funds for sectors or companies to finance energy efficiency improvements
- Sector-specific infrastructure spending
- Targeted investments in emissions reductions from large final emitters
- Investments in carbon capture and storage
- Investments in renewable energy

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- Investments in research and development for clean technologies
 - Investment in the production of biofuels

Broad-based efforts:

- Investment in transportation infrastructure (rail, clean trucks, hydrogen)
- Transition funding for workers hurt by shifts in sectoral economics
- Incentives for building energy efficient homes
- Fee-bates for the purchase of energy efficient vehicles

Option 2

Participants generally preferred broad-based tax reductions simultaneously targeting businesses and individuals, including:

- Reductions in corporate and individual income taxes
- Reductions in payroll taxes
- Elimination of the capital gains tax
- Increases in investment tax credits

Overall, most participants were preferentially supportive of a portfolio approach to revenue recycling, in which several different recycling strategies are employed.

Synthesis and Identification of Recurring Themes

Revenue Neutrality and Treatment of Sectors

Many of the small working groups used the question of revenue neutrality as an opening point for discussion. However, more than revenue neutrality to *governments*, many participants were interested in the question of whether carbon pricing policies should change the overall tax burden of *sectors*. In other words, some felt that recycling should be used to reward relatively efficient operators *within* sectors, but not provide incentives favouring one sector over another. This question also consumed a substantial portion of plenary time.

Public Education and Transparency

Ensuring that the public understands the benefits of carbon pricing was identified as vital to the effectiveness of carbon pricing policy. Many delegates emphasized the need for public education and awareness-raising to minimize the political friction that could result from policy change. In particular, transparency was identified as vital to helping consumers understand the true cost of energy and the benefits of voluntary measures to reduce GHG emissions.

Unintended Consequences

Several participants noted that there are many information gaps about the likely effects of policies that will not be filled until / unless carbon pricing with revenue recycling is implemented. In this context, some expressed concern about the risks of adverse unintended consequences. Examples cited included: flight of capital, increases in energy costs, pressures on low-income earners, and uncertainty resulting from governments' continually making policy changes based on political expediency, rather than committing to a stable, long-term vision.

Potential Common Ground

There was widely shared support for goals including improving energy efficiency, driving innovation, maximizing emission reductions, giving money back to Canadians, mitigating unintended consequences, and investing in the accountability, transparency and sale-ability of policies. Unfortunately, time constraints prevented a substantive discussion about priorities within this set of possibilities.

However, one of three small groups was able to find common ground around a simpler hierarchy of objectives: first, and in the short-term, recycle revenues through spending on additional emissions reductions; second, and in the medium-term, once cost-effective reduction options are exhausted, recycle revenues through broad-based tax reductions; finally, in the long-term, if emissions reduction and tax shifting opportunities are both exhausted, use revenues to finance public debt reduction.

Although there was no opportunity to vet to this proposal systematically among participants, the idea was notably consistent with the principles expressed by other groups, and was recommended as an area for further investigation.

Tools for Price Setting (Working Sessions 2 / 3, stream ‘B’)

For a description of the design of working sessions 2 / 3, please see the introduction to the “Revenue Recycling” working sessions on page 13.

The “Straw Dog” Proposals

In working session 2B, participants agreed on two policy proposals (with variations) for pricing carbon. Both proposals were “hybrids”, combining some form of a carbon tax with some form of permit trading system.

- 1A. A cap-and-trade scheme for large final emitters with a carbon tax on “downstream” emissions (transportation fuels, home heating etc.)
- 1B. Same as Option 1A, above, but with a price cap as part of the system
2. A broad-based carbon tax offering emitters the option of purchasing credits (offset, international, or other, including a voluntary cap-and-trade system) to reduce tax obligations

The options are summarized in Figure 5.

Pricing Policy Tools — straw dogs

- 1A** Cap-and-trade program for large industry **plus** a carbon tax on “downstream” emissions
 - Partial auctioning of credits
 - Maximum integration with other jurisdictions
 - Offset credits as one compliance option
 - Complementary regulations in areas less responsive to price signals
- 1B** Same as 1A **plus** a price cap in the cap-and-trade system
- 2** Broad-based carbon tax that offers emitters the option of purchasing credits (through a variety of mechanisms)

Figure 5. Tools for Price Setting “straw dog” proposals

Initial Reactions

In working session 3B, participants started by exploring implications of each straw dog proposal, identifying key questions and proposing additional details.

Option 1A

- Trading components should be integrated as much as possible with other jurisdictions.
- Offset credits could be a compliance option in this system.
- Complementary regulations in areas that respond less well to price signals (buildings, vehicles etc.) are important.
- Clear evaluation criteria will be critical to success of the program.
- Flexibility will need to be built in, especially in the early stages of the system design.
- Transaction costs will need to be effectively calculated.
- Decisions will need to be made as to whether to have full or partial auctioning of tradeable credits (e.g. partial auctioning of credits to start and transitioning to full auction thereafter).
- Offsets must be of high quality (piggy-backed on global best practices).
- Double taxation must be avoided.

Option 1B

- There is a need for a floor price as well as a ceiling price.
- There will be a need for someone to cover the liability when prices exceed the cap.

-
- A relatively long compliance period will be needed to ensure price stability.
 - If an offset system is introduced as a “safety valve”, then attention will need to be focused on whether international and/or domestic offsets are incorporated.
 - Absolute targets will be required for a cap-and-trade system with a price cap.
 - Careful attention will need to be paid to ensure that no double counting occurs.

Option 2

- Certainty will be needed to facilitate long-term decision-making.
- The “right” price is needed in order to generate the “right” impacts.
- The system will need to be transparent and trust-worthy.
- There will be significant political aversion to a new tax so it will need to be messaged effectively.
- Any tax will need to be inherently tied to revenue recycling.
- The most effective means of taxing will be point-of-source (wellhead).
- Consideration for low-income earners will need to be made as costs associated with the tax will be passed on to consumers.
- Perverse subsidies will need to be identified and eliminated.

Synthesis and Identification of Recurring Themes.

Coverage

Covering all GHG emissions from all parts of the economy that respond rationally to price signals is necessary in order to develop effective pricing policy.

Price Signal

The price signal must be high enough to incentivize changes in behaviour, but not so high as to remove players from the market. It must also provide firms with a reasonable amount of time to plan for capital stock investments and other business changes.

By definition, a carbon tax allows for a certain and transparent price signal whereas under a cap-and-trade system, the price level tends to be volatile (albeit with a tendency to trend upward over time if the cap is continually lowered).

Some participants were skeptical that governments would set carbon taxes at a sufficiently high level to elicit behavioural changes. Instead, they felt that a cap-and-trade system would be a more politically feasible alternative for setting a relatively high carbon price.

Transaction Costs

Transaction costs were a widely shared concern. If carbon pricing leads to a government-administered reallocation of funds, from firms or sectors that emit more to firms or sectors that emit less, it is essential that the system be made as efficient as possible.

Compatibility with International Regimes

Repeatedly, participants noted that the chosen tool – whether a tax, trading or a hybrid – must be able to integrate with current and proposed international regulatory regimes. This was presented as key to addressing industry competitiveness concerns. By contrast, others emphasized that the

compatibility issue should not be used as an “excuse” to hinder the development of domestic policy tools, but rather be seen as one component among many to consider during policy design.

Potential Common Ground

There was widespread support for the idea that a hybrid system, combining both a carbon tax and a cap-and-trade regime, may be the most effective option for the Canadian context. A “second generation” straw dog reflecting these ideas (but by no means representing a consensus position among participants) was proposed and included:

- A carbon tax on consumers of fossil fuels that is (a) broad-based and non-discriminatory (i.e. everyone faces the same charge); (b) accompanied by a clear schedule for raising the price over time; and (c) continually evaluated to determine environmental impact
- A cap-and-trade system for large final emitters that includes (a) no more than partial free permit allocation at start-up and ultimately moves to full auctioning; (b) rigorous and transparent rules for internal reduction accounting; and (c) provision for high quality, verifiable offsets to satisfy some portion of compliance requirements.

Closing Plenary

The closing plenary recapped key ideas identified through the third working session.

With regard to revenue recycling, there was:

- Broad support for pursuing a portfolio approach (incorporating several recycling methods)
- Some preference, *ceteris paribus*, for revenue neutral portfolios
- Widely shared concern about potential “winners” and “losers” among sectors, and a preference that governments *not* determine these “winners” and “losers” through recycling design (∴ either select “sector-neutral” recycling methods and/or find some other way to “let the markets decide”)
- Interest in one group’s proposal for a simple hierarchy: first use revenues to implement additional, targeted emissions reductions; when mitigation opportunities are exhausted, use revenues for broad-based tax reductions; finally, in the long-term, once emissions reduction and tax reduction opportunities are exhausted, use revenues to pay down public debt.

With regard to pricing tools, there was:

- Widespread interest in a hybrid system incorporating cap-and-trade for large emitters and a non-discriminatory, economy-wide tax³

³ NB: At a high level, this proposal is similar to the approach that has since been announced by British Columbia, including a carbon tax on fossil fuels and participation in the Western Climate Initiative (WCI) cap-and-trade system for major polluters. However, many of the detailed design questions regarding B.C.’s proposed system are still being addressed.

-
- Substantially shared support for (a) safety valve provisions, such as price caps, in the short-term, (b) earnest efforts to harmonize with other jurisdictions, and (c) provision for quality offsets to partially satisfy compliance requirements.

In addition, several new and recurring themes were raised during a closing round of comments. These included:

- Concern that much more research and modelling needs to be conducted to provide scientific bases for detailed policy decisions – and conducted very quickly given the urgency of action and the rapidly changing political/policy context
- Strong interest in identifying means for harmonizing Canadian policy with “emerging international” structures – given both the importance and apparent difficulty of this task
- Widely shared interest in continuing the conversation, finding ways to “cut through the jargon”, and involving a broader range of stakeholders, especially government, in order to more effectively influence policy development.

Next steps

A number of simple next steps were identified at the conference’s close:

- Prepare and disseminate a summary of the discussion.
- For those interested, find ways to communicate the level of interest and specific ideas generated by the conference – in particular to federal and provincial policymakers.
- Look out for opportunities to tackle specific design questions in more detail, as a group, or an informal subset of the group.⁴

Further updates will be posted at the conference website: www.pembina.org/conference2007..

⁴ NB: As one example, the Pembina Institute has started developing a thought leaders’ forum to consider financial and regulatory gaps that need to be addressed in order to spur deployment of carbon capture and storage (CCS) technology. One of the key design questions relates to setting an effective and appropriate carbon price signal that could incentivise CCS investments. More information on this initiative will be available in late summer 2008 at www.pembina.org.

Conversation cafés

Six “conversation cafés” – one-hour sessions focusing on specific and ancillary topics – were run on the second day of the conference. The objective was to allow for more detailed discussion on topics of interest to participants. Some questions were proposed in advance; others arose as a result of the conference discussion. The summary highlights below were compiled from rapporteurs and information kindly provided by conveners.

Public Engagement

Convener: Donna Morton

Public engagement is a crucial element in the development of climate change policies. Historically, however, there has been a lack of interest in genuine, public-friendly dialogue about carbon pricing. Much more meaningful engagement is required. In particular, governments should avoid “selling” policy plans and ideas; rather, they should solicit input, build trust and gain buy-in through open discussions with stakeholders.

Public engagement is also a means of aligning public values with climate policy so that behavioural changes are more likely. When people have a sense of ownership of policy objectives – or even policies – they will be more likely to act on their principles.

Price Levels

Convener: Matthew Bramley

The price level is the “elephant in the room”. No carbon pricing policy will be successful if the price is “wrong”. In setting prices, governments should be cognizant of the following points:

- A price of \$15/t is not sufficient to generate significant reductions in GHG emissions. A cap needs to be placed on emissions and the cap will drive the economy towards an optimal price.
- The cost of technology should not drive the debate about price. If technology costs are used to justify carbon prices, technology winners and losers will be inadvertently, and artificially, selected.
- There needs to be price certainty for industry (although what “certainty” means, exactly, needs further clarification and discussion).
- Price levels need to be coupled with timelines to lend some predictability to the system.
- Price levels will be influenced by effects in the markets as well as by government regulations – a fact which governments need to take into consideration.

Price is not the only variable that influences behaviour, so it is also important to adopt effective supporting policies and standards that encourage further emissions reductions.

Option 13

Convener: Toby Heaps

Option 13 is an effort to galvanize international support behind mechanisms to prevent dangerous global climate change in advance of 2013. For more information on this initiative, visit <http://www.option13.org>.

Fundamentally, Option 13 sets out to establish a globally harmonized price for carbon. The price would start at \$50/t and increase to \$100/t over time.

The discussion brought to light many questions, including: what timeline for phasing in an initial price of \$50/t is realistic? How will existing trading systems be integrated into a single global system?

Economic Efficiency

Convener: Elizabeth Wilman

A distinct and clear framework is needed to evaluate carbon pricing and other climate policy options in relation to their economic efficiency. This is arguably one of the most important criteria by which policies should be measured. Frameworks will need to take account of the price elasticity of energy and of abatement cost curves at the firm, sector and national levels.

Theoretical and practical research is needed in order to bring clarity to this debate.

USCAP

Convener: Ed Whittingham

The United States Climate Action Partnership or USCAP is an initiative through which the CEOs of more than 30 major U.S. companies have agreed to work together to promote and develop a cap-and-trade system for the US. As an unusual alliance comprising a wide variety of industrial sectors, as well as leading U.S. ENGOs, USCAP has attracted significant attention from lawmakers and has had influence over emerging legislation. Although there is no direct analogue in Canada, some companies have expressed an interest in developing an alliance modelled on the U.S. experience.

Revenue Recycling

Convener: Dave Sawyer

The David Suzuki Foundation contracted Dave Sawyer to perform detailed modelling on revenue recycling options. Initial results were presented and discussed. In particular, using emission reduction targets found in the federal government's regulatory framework (20% below current levels by 2020, and 60% below 2006 levels by 2050), the value of emissions is found to peak at \$80 billion in 2035 with a requisite carbon price of \$295 per tonne. In 2035, this would represent 8-12% of total government revenues.

Key implications include:

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- The value of revenue from unabated emissions could be very high even under deep reduction scenarios, and could be equivalent to major sources of government revenue such as GST, corporate taxes and employment insurance.
 - While this new source of revenue seems to provide considerable opportunities for additional program spending and tax shifting, there are important trade-offs. As increasing amounts of emissions revenue is diverted away from emitters, there will be intensified adverse effects on product prices, output and ultimately emissions. The relative importance of these factors remains an open question.
 - Proposed next steps are to more fully explore tax shifting and revenue recycling opportunities using a general equilibrium economic modeling framework better suited to questions of public finance and macroeconomic impact.

Appendix A: Conference Agenda

The conference was hosted over two days, Monday October 29th and Tuesday October 30th, 2007. The conference agenda is presented below.

Conference Day 1: Monday October 29, 2007	
11:00 – 12:00	Arrivals and registration
12:00 – 12:40	Lunch
12:40 – 12:45	Move to tables assigned for Working Session [1]
12:45 – 13:30	<p><u>Conference inauguration</u> and welcome by the facilitators – Marlo Reynolds and Rob Abbott (plenary)</p> <ul style="list-style-type: none"> — Setting up the issues: what do we hope to achieve over the next two days? — Introduction to the conference format and ground rules — Location: North Ballroom
13:30 – 15:00	<p><u>Working Session [1]</u></p> <p>An Evaluation Framework for Carbon Pricing</p> <ul style="list-style-type: none"> — What criteria should we use in evaluating the success of a carbon pricing system? — Plenary set-up followed by small group discussions (see table assignments in the participants' list), followed by plenary reporting — Location: North Ballroom
15:00 – 15:30	Break
15:30 – 16:55	<p><u>Working Session [2]</u></p> <p>Exploring the Options</p> <p>First stream — Tools for Setting a Carbon Price</p> <p>Second stream — Revenue Recycling</p> <ul style="list-style-type: none"> — Participants will be split up into two streams (see table assignments in the participants' list) — Semi-plenary set up, followed by small group discussions, followed by semi-plenary reporting — Location: North Ballroom (Tools), South Ballroom (Recycling)

Conference Day 2: Tuesday October 30, 2007	
07:30 – 08:30	Breakfast
08:30 – 09:00	<p><u>Recap</u> of key learnings from Day 1 (plenary)</p> <ul style="list-style-type: none"> — Evaluation criteria version 2.0 — Outcomes from working session [2] – straw dogs — Setting up the issues: where do we need to focus our attention today? — Location: North Ballroom
09:00 – 10:30	<p><u>Working Session [3]</u></p> <p>Further Design and Evaluation</p> <p>First stream — Revenue recycling</p> <p>Second stream — Tools for Setting a Carbon Price</p> <ul style="list-style-type: none"> — Participants will be considering the opposite topic from working session [2] — The purpose is to refine and evaluate proposals from the previous day — Location: North Ballroom, Breakout rooms
10:30 – 10:45	Break
10:45 – 11:30	<p><u>“Conversation café” tables</u></p> <ul style="list-style-type: none"> — These are discussions on specific topics that merit fuller discussion than they have received up to this point — Topics (including discussion leaders and locations) will be announced / handed out during working session [3]. — Location: North Ballroom, Breakout rooms
11:30 – 12:15	Buffet lunch, report back from conversation café tables
12:15 – 13:00	<p><u>Town Hall</u> (plenary)</p> <ul style="list-style-type: none"> — Conclusions: where did we start and where have we landed? — Where do we go from here? — What are the next steps and outstanding issues?

Appendix B: Conference Participants' List

CARBON PRICING FOR A SUSTAINABLE ECONOMY - PARTICIPANTS' LIST		
Name	Affiliation	Title
Facilitators		
Marlo Reynolds	Pembina Institute	Executive Director
Rob Abbott	Deloitte	Sustainability Practice Leader
Participants		
Alan Wright	TD Securities	Managing Director, Head of Origination
Alex Wood	National Roundtable on the Environment and the Economy	Senior Advisor to the President
Allan Amey	IISD	Associate
Amy Taylor	Pembina Institute	Director, Ecological Fiscal Reform
Andrew Van Iterson	Green Budget Coalition	Program Manager
Angus McAllister	McAllister Opinion Research	President
Anish Neupane	Alberta Environment	Senior Advisor, Environmental Economics
Ashley Nixon	Shell	Sustainable Development Advisor
Bill Woodward	Sustainable Forest Management Network	Executive Director
Bob Mitchell	ConocoPhillips	Climate Change Advisor
Brian Ross	Nexen	Air Issues Specialist
Bruce Love	AgCert Canada	Manager, Western Canada
Bruce Wilcoxon	ConocoPhillips	Director, Climate Change
Bryan Bateman	The Bryman Partnership Ltd.	CEO
Chris Joy	ENMAX	Director, Asset Management
Chris Roth	Canadian Gas Association	Senior Advisor, Policy and Economics
Christie Stephenson	The Ethical Funds Company	Manager, Sustainability Analytics
Christine Schuh	PricewaterhouseCoopers	Director and Leader, Climate Change Services
Cindy Christopher	Imperial Oil	Manager, Safety, Health and Environment

Dale Marshall	David Suzuki Foundation	Climate Change
Darryl Bandoro	McAllister Opinion Research	Research Analyst
Dave Sawyer	EnviroEconomics	Economist
Dave Thompson	Sustainable Prosperity	Project Director
David Arthur	Deloitte	Senior Manager, R&D Tax
David Bouckhout	TD Securities	Senior Analyst
David Coates	Ontario Power Generation	Senior Emission Offsets Advisor
David Lawlor	ENMAX	Manager, Environmental Affairs
David MacLaughlin	National Roundtable on the Environment and the Economy	President
David Paterson	General Motors of Canada Ltd.	VP Corporate and Environmental Affairs
David Schwass	NOVA Chemicals	Senior Advisor, Environment
Dianne Zimmerman	Suncor	Senior Manager, Issues Management and Stakeholder Engagement
Don Wright	Analytica Consulting	Principal
Donna Morton	Integral Economics	Executive Director
Doug Ritchie	Ecology North	Program Director
K.E. Egeland	StatoilHydro	Senior VP, International E&P Business Support
Elizabeth Wilman	Department of Economics, University of Calgary	Professor
Emanuel Machado	City of Dawson Creek	Deputy Director, Development Services
Eric Switzer	Greenvision Management	Principal
Felix Von Geyer	Platts Emissions Daily	Canada Correspondent
Frances Bowen	Institute for Resource Industries and Sustainability Studies, University of Calgary	Director
Gary Holden	ENMAX	President and Chief Executive Officer
Gerry Gagnon	Government of the Northwest Territories	Manager, Tax Policy
Gil McGowan	Alberta Federation of Labour	President
Gillian Kerr	Alberta Environment	Senior Policy Advisor
Greg Kiessling	Bullfrog Power	Chairman
Ian Bruce	David Suzuki Foundation	Climate Change Specialist
Jamie Bonham	The Ethical Funds Company	Sustainability Analyst
Jamie Ross	Deloitte	Senior Manager, Corporate Responsibility and Sustainability Services
Jason Hollett	Nova Scotia Department of Energy	Program Administration Officer
Jason Rose	Greenius Inc.	President
Jean Langlois	Sierra Club of Canada	National Campaigns Director
Jean Nolet	ÉcoRessources Consultants	President

Jennifer Souter	University of Saskatchewan	Graduate Student
John Kenney	Alberta Environment	Policy Specialist
John Williamson	Canadian Tax Payers Federation	Federal Director
Joslyn Higginson	Greenpeace	Climate and Energy Consultant
Katharine Brass	GE	Marketing Manager
Lloyd Visser	ConocoPhillips	General Manager, Environment and Stakeholder Engagement
Louis Marmen	Canadian Gas Association	Director, Gas Markets
Marian Weber	Alberta Research Council	Economist
Matthew Bramley	Pembina Institute	Director, Climate Change
Mel Wilson	PricewaterhouseCoopers	Associate Partner and Leader, Sustainable Business Solutions
Michael Collins	TD Securities	Vice President and Director Credit Management, Investment Banking
Mike MacPhee	Nexen	General Manager, Power Marketing
Nashina Shariff	Toxics Watch	Associate Director
Nelson Switzer	RBC	Senior Manager, Corporate Environmental Affairs
Nicola Ross	Alternatives Journal	Executive Editor
Oliver Bussler	EPCOR	Commercial Manager
Pat Concessi	Deloitte	Leader, Global Climate Change and Sustainable Resources
Paul Lansbergen	Forest Products Association of Canada	Associate Secretary and Director
Paul Lingl	David Suzuki Foundation	Climate Change Campaigner
Paul Wieringa	BC Ministry of Mines, Energy and Petroleum Resources	Executive Director
Per Markestad	StatoilHydro	Vice President, Sustainable Technology
Pierre Sadik	David Suzuki Foundation	Senior Policy Advisor
Rachel Samson	Finance Canada	Senior Economist
Rob Macintosh	Dejanira Entreprises	President
Rod Perry	DuPont Canada	New Business Development
Roxanne Pettipas	ConocoPhillips	Air Emissions Coordinator
Samara Jones	Alberta Federation of Labour	Director, Legislative Affairs
Sara Wilson	Natural Capital Research and Consulting	Principal
Stephanie Cairns	Wrangellia Consulting	President
Svetlana Morozova	Cantor CO2e Canada	Technology Officer
Thomas Storning	Nova Scotia Department of Finance	Policy Strategist
Timo Makinen	Shell	Manager, GHG Offset Portfolio

Toby Heaps	Corporate Knights	President
Toby Sanger	Canadian Union of Public Employees	Senior Economist
Valerie Chort	Deloitte	Partner
Yazid Dissou	Department of Economics, University of Ottawa	Associate Professor
Assistant Facilitators		
Alison Bailie	Pembina Institute	Senior Technical and Policy Advisor
Alison Jamison	Pembina Institute	Senior Project Manager
Cherise Burda	Pembina Institute	Director, Ontario Policy
Clare Demerse	Pembina Institute	Climate Change Policy Analyst
Ed Whittingham	Pembina Institute	Co-Director, Pembina Corporate Consulting
Greg Powell	Pembina Institute	Eco-efficiency Analyst
Jesse Row	Pembina Institute	Director, Sustainable Communities Group
Kasia Sell	Pembina Institute	Climate Change Services Coordinator
Matt Horne	Pembina Institute	Senior Technical and Policy Advisor
Matt McCulloch	Pembina Institute	Director, Climate Change
Mike Kennedy	Pembina Institute	Policy Analyst
Tim Weis	Pembina Institute	Senior Technical and Policy Advisor
Rapporteurs		
Jeremy Moorhouse	Pembina Institute	Eco-efficiency Analyst
Rich Wong	Pembina Institute	Eco-efficiency Analyst
Organisers		
Jaisel Vadgama	Pembina Institute	Policy Analyst / Senior Assistant to the ED

Appendix C: Expert Advisory Committee

Sponsor Members	
Delegate (/alternate delegate)	Affiliation
Bob Walker	Ethical Funds Company
Dianne Zimmerman	Suncor
Don Drummond	TD Bank
Per Markestad	Statoil / NAOSC
Gary Holden / David Lawlor	Enmax
Johanne Gélinas	Deloitte
Lloyd Visser	Conoco Phillips
Nelson Switzer	RBC
Shahrzad Rahbar	Canadian Gas Association
Wishart Robson / Brian Ross	Nexen
Non-sponsor Members	
Delegate	Affiliation
Brett Gartner	Canada West Foundation
Donna Morton	Centre for Integral Economics
Mark Anielski	Anielski Management
Pierre Sadik	David Suzuki Foundation
Robert Hornung	Canadian Wind Energy Association
Stewart Elgie	University of Ottawa

Appendix D: Conference “Ground Rules”

Carbon Pricing for a Sustainable Economy is intended to generate open, constructive and solution-focused discussion among a wide range of industry, NGO, academic and government participants.

The Pembina Institute believes that this type of collaborative, multi-stakeholder dialogue holds significant potential for identifying new insights and synergies, although there may be moments of uncertainty and unfamiliarity as well.

A set of “ground rules” can help to:

- harmonise expectations and set the tone of discussion;
- create a “comfort zone” that allows participants to express their thoughts freely, as expert individuals; and
- maintain focus and keep working sessions on track.

To that end, all participants will be asked to respect the following principles and “ground rules”.

Attribution and Confidentiality

- Many conference participants have worked in a variety of institutional and sectoral contexts and should feel comfortable drawing on the full breadth of their experience in addressing the questions at hand.
- The conference will strive to create an environment in which participants may contribute as expert individuals outside of their institutional positions, should they wish to do so.
- To create a safe space for open discussion, Chatham House Rules will govern participation in all plenary and working sessions; under these rules, ideas generated during the conference may be used and reported, but may not be attributed to individuals or to organizations.

Formal Reporting of Conference Outcomes

- The Pembina Institute sees value in sharing substantive conference outcomes with a wider public – including industry, policymakers and opinion leaders – in order to inform and advance ongoing carbon pricing design work in Canada. These outcomes may include identification of new insights, potential areas of common ground, and areas requiring further study.
- Pembina staff will record key outcomes as rapporteurs in plenary and working sessions and will compile a complete conference proceedings document, without attribution of ideas to individuals or organisations (i.e. following Chatham House Rules). This document will be reviewed and approved by the Expert Advisory Committee and will be distributed to conference participants before being made available to the public.

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- There is, however, no expectation of reaching a “consensus position” agreed to by all or some participants. Given the short timelines and the diversity of participant perspectives, such an expectation is likely not feasible and could also serve to limit open discussion.
 - The Expert Advisory Committee will have the option of recommending any further outreach activities (such as an official release of the proceedings), if there is shared interest.

Topics Excluded from Debate

- The conference has an ambitious agenda with just under ten hours of time allocated for plenary and working discussion. In order to make progress on this agenda, it is expected that all participants will accept two basic premises: that Canada needs to reduce its greenhouse gas emissions, and that carbon pricing is a valuable tool for doing so.
- For similar reasons, it is expected that participants will not raise lobbying issues during plenary and working sessions. While existing government policies provide essential context for design questions that will be addressed by this conference, this event should not be seen as an opportunity for “consultation” on these policies.

Role of Government, Media and Other Participants

- Given the diversity of participant backgrounds, it is understood that there may be sensitivities around the participation of certain individuals, whose prominence or affiliation might make others leery about speaking freely. This may notably include policymakers and experts working with media organisations.
- To the extent that government, industry, academics, NGOs and the media all have a role to play in solution-building, the Pembina Institute is keen to welcome participation from all expert individuals with an interest in constructive debate.
- As such, the conference will not distinguish any special status for government, political, media, or other participants. However, the conference organisers will make a special effort to cover the ground rules, possibly in one-on-one conversations, with any individuals whose participation may raise sensitivities as noted above.

With respect to media, the conference expects to limit participation to experts or pundits with a long-term interest in climate change and carbon pricing. Like all others, they will be expected to adhere to Chatham House Rules. No news media will be invited

Appendix E: Participant Feedback

Conference participants were asked to complete an evaluation form at the end of the conference – 54 forms were received. A brief summary of the results follows.

1. How useful was this conference in your opinion? Rank on a scale of 1 to 4 (where 4= extremely useful; 1= not useful at all).

Average score: **3.5**

Selection of written comments:

- great networking opportunity
- great format
- learned a great deal
- diverse, complex and well organized
- great first step

2. Would you participate in a similar Pembina Institute event in the future? (Yes or No)

Average score: all respondents but one stated that they would participate in a similar event. The one respondent who said no indicated that if there were a different format and if the conference were cheaper, they would attend again.

Selection of written comments:

- Would suggest that proposal frameworks be more defined.
- Pembina provides an excellent interface for policy development.
- More open dialogue time needed.
- Need time to discuss issues in groups with similar sectors.
- Our company would have more delegates participate.

3. What were the best features of the conference? What could have worked better? (Please consider topic selection, research, participants, facilitators, venue/food, and anything else you wish to comment on.)

Selection of best features (in descending frequency of citation; total no. of respondents = 47):

- wide selection of attendees
- format and organization
- facilitators
- free open dialogue
- venue and food

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- evening gala

Selection of what could have worked better (in descending frequency of citation; total no. of respondents = 34):

- Need for more focus and structure for discussions
- More lead-time with conference materials
- More attention to diversity of participants (Federal Government, Industry and NGOs).
- More strength in facilitation

4. Was the conference fee: about right, too expensive, or could be increased?

Score: Out of 43 respondents – about right, 34 (79%); too expensive, 5 (12%); could be increased 4 (9%).

5. How useful were the delegates’ package and research papers, in your opinion? Rank on a scale of 1 to 4 (where 4= extremely useful; 1= not useful at all).

Average score: **3.3**

Selection of comments (in descending frequency of citation; total no. of respondents = 25)

- Very useful and well done
- Would have liked them earlier
- More analysis and information needed

6. What do you recommend as next steps to move this discussion forward?

Selection of comments (in descending frequency of citation; total no. of respondents = 35)

- Create a smaller group and move discussions forward
- Design a policy and share with participants
- Take it to the Feds
- Commission papers to look at key design issues and reconvene
- Create a CanCAP
- Create ongoing forum for open dialogue

7. Would you or your organization be interested in supporting / sponsoring a similar event in the future?

Average score: Out of 37 respondents – yes, 28; don’t know, 5; no, 1; would if possible, 3.

8. What sectors or individuals would have been valuable additional participants?

Selection of comments (in descending frequency of citation; total no. of respondents = 35)

- Federal government
- Industry

-
- Provincial governments
 - Other NGOs
 - IETA

9. Please add any other comments if you have any.

Selection of comments:

- Small group sessions were useful and engaging
- Try to plan so conferences don't overlap
- More focused discussion, evaluation criteria better defined, and more specific discussion groups"
- There is enough common thinking to move forward
- May be good to have some key presentations about issues to be discussed
- This was great to take a non-political approach, felt like we achieved a lot
- Facilitators were sharp, Marlo did a great job leading