IESBA Outreach and Related Activities for 2022
(January – November 2022)

January

- Presentation to the New York State Society of CPAs' (NYSSCPA) Sustainability Accounting and Reporting Committee on the IESBA's Sustainability initiative (Jules, Sramko)
- Forum of Firms meeting (Dias, Siong, Jules)
- Meeting with representatives of the Abu Dhabi Accountability Authority (Clark)
- Meeting on Ethics and Technology with the Head of Artificial Intelligence and member of the Executive Committee at the World Economic Forum (B. Friedrich, L. Friedrich, Leung)
- Meeting on Professional Accountant in Business (PAIB) issues related to Technology with alternative asset management firm HRL Morrison (B. Friedrich, Leung)
- Meeting on Public Sector Ethics and Technology issues with senior Government of Canada representatives (B. Friedrich, Leung)

February

- IAASB roundtable on Disruptive Technology (Huesken)
- IOSCO Sustainable Finance Task Force roundtable on sustainability-related assurance (Dias, Gunn, Siong, Jules)
- Roundtable on Technology and Ethics hosted by the Pan African Federation of Accountants (B. Friedrich, L. Friedrich, Borgerth, Clark, Huesken, Nisoli, Leung)
- Meeting with Hilde Blomme (Deputy CEO), Liesbet Haustermans (Chair, Professional Ethics Working Party), and Harun Saki (Staff), Accountancy Europe (Dias, Siong, Jules)
- ASEAN Federation of Accountants workshop on IFAC Statement of Membership Obligation (SMO) 4, IESBA C*ode of Ethics for Professional Accountants* (Kwan)
- Meeting with representatives of the Institute of Electrical and Electronics Engineers (IEEE) and IFAC (B. Friedrich, L. Friedrich, Siong)
- Meeting with representatives of the International Bar Association (IBA) and IFAC on the topic of non-trial resolution (Dias, Siong, Jules)
- Interview with CPA Canada Foresight for its podcast series to discuss ethical challenges and opportunities related to the future of the profession, with a focus on technological innovations (B. Friedrich, L. Friedrich)
- Meeting with CPA British Columbia Regulatory Chairs in relation to regulatory and standards trends (L. Friedrich)
- Meeting with representatives of the CPA Canada Public Trust Committee to discuss recent IESBA pronouncements and the organization's continued work on a principles-based Code (B. Friedrich)
- Interview with ICAS magazine, February 2022 edition (Siong)

March

- IESBA CAG meeting (Dias, Lee, Borgerth, Poll, Friedrich L., Gunn, Siong, Jules, Kwan, Leung, Vijian, Sramko)
- Virtual presentation on Ethics and Technology to the CFO Circle hosted by the Malaysian Institute of Accountants (MIA) (Huesken)
- Meeting with Larry Bradley, Global Head of Audit and Assurance, KPMG – New York, USA (Dias, Lee, Siong)
- Meeting with representatives of IEEE and IFAC – New York, USA (Dias, B. Friedrich, L. Friedrich, Siong, Leung)
- Meeting with the International Organization of Securities Commissions (IOSCO) Committee 1 (Dias, Thomadakis, Gunn, Siong, Jules)
- Meeting with the Standards Coordination Working Group (SCWG) of the International Forum of Independent Audit Regulators (IFIAR) (Dias, Lee, Siong, Jules, Kwan)
- Panelist at the Arab Federation of Capital Markets (AFCM) annual conference (Borgerth)
- Forum of Firms meeting (Dias, Siong, Jules)
- IOSCO-International Valuation Standards Council (IVSC) virtual roundtable on the topic of valuations (Babington)
- Presentation to the CPA Alberta Board in relation to ethical leadership and the four joint IESBA Technology Working Group thought leadership papers (B. Friedrich, L. Friedrich)
- Interview for CPA Canada magazine in relation to bias, mis- and dis-information in the context of professional ethics (B. Friedrich, L. Friedrich)
- UK outreach, London:
    - Meeting with Sir Jonathan Thompson (CEO) and Sarah Rapson (Head of Supervision), UK Financial Reporting Council (Dias, Babington, Siong)
    - Meeting with investor representative Natasha Landell-Mills, Sarasin & Partners (Dias, Siong)
    - Meeting with Gian Piero Cigna (Acting Director and Chief Counsel, Financial Law Unit) and Vesselina Haralampieva (Senior Counsel) (Dias, Siong)
    - Meeting with Prof. Colin Mayer of University of Oxford (Dias, Siong)
    - Meeting with Neil Acres (Managing Director, Head of Government & Regulatory Affairs) and Meggin Thwing Eastman (Managing Director, ESG Research), MSCI (Dias, Siong)
    - Meeting with Michael Izza (CEO), Iain Lowson (Chair of CCAB Ethics Group), Peter van Veen (Director, Corporate Governance and Stewardship), and David Gomez (Senior Lead, Ethics), Institute of Chartered Accountants in England and Wales (ICAEW) (Dias, Siong)
    - Meeting with Nandini Sukumar (CEO), World Federation of Exchanges (Dias, Siong)

April

- UK outreach, London (cont'd):
  - Meeting with Helen Brand (CEO), Maggie McGhee (Executive Director – Strategy & Governance), Mike Suffield (Director – Professional Insights), and Sundeep Takwani (Director – Practice Regulation), Association of Chartered Certified Accountants (ACCA) (Dias, Siong)
  - Meeting with James Chalmers (Global Assurance Leader) and Gilly Lord (Global Leader – Public Policy and Regulation), PwC (Dias, Siong)
  - Meeting with Neil Morris (Global ESG Assurance Methodology Lead), Renzo Francescutti (Head of Global Independence), Sheri Anderson (Head of Global Audit Quality), and Margot Tenenbaum (COO, Global Independence), KPMG (Dias, Lee, Siong)
- Meeting with the IFAC Small and Medium Practices (SMP) Advisory Group (Dias, Huesken, Siong, Jules, Leung, Sramko)
- Meeting with the Monitoring Group (Dias)
- Meeting with Imran Vanker (Director, Standards) and Liezel du Preez (Professional Manager, Auditor Ethics), Independent Regulatory Board for Auditors (IRBA) (Dias, Siong)
- IESBA global webinar on the proposed technology-related revisions to the Code (Huesken, Driscoll, Leung)
- Presentation to the NYSSCPA on the IESBA's Technology and Engagement Team – Group Audits (ET-GA) Exposure Drafts (Huesken, Jules, Leung)
- Meeting with representatives of the Institute and Faculty of Actuaries on Ethics and Sustainability to discuss the IESBA's sustainability initiative (Babington)
- Meeting with representatives of the International Sustainability Standards Board (ISSB) to discuss the IESBA's sustainability initiative (Babington, Jules)
- IESBA global virtual roundtables on enhancing ethics considerations relating to tax planning and related services (Poll, Chaudhary, Endsley, Wijesinghe, Dias, Siong, Vijian)
- IESBA global webinars on the proposed revisions to the Code relating to the Definition of Engagement Team and Group Audits (ET-GA) (Lee, Pinkney, Canavan,[1] Siong, Vijian)
- Meeting with Alan Young, EY Global Assurance Leader; EY Helix and Global Emerging Technology Standards Leader, to discuss ethics and technology (B. Friedrich, Clark, Leung)

May

- Participation in the International Auditing and Assurance Standards Board's (IAASB) third and final Less Complex Entities (LCEs) roundtable – Paris, France (Dias)
- Presentation on the IESBA's NOCLAR provisions to representatives of the International Bar Association's (IBA) Anti-Corruption Committee, Ethics Committee and Tax Committee, with invited representatives of the American Institute of Certified Public Accountants (AICPA) and participation of IFAC staff (Dias, Siong, Jules, Kwan)

[1] Ms. Denise Canavan, former IESBA Technical Advisor and member of the ET-GA Task Force

- Meeting with Accountancy Europe's Professional Ethics and Competences Working Party and IAASB & PCAOB Working Party to discuss the ET-GA Exposure Draft (Lee, Adam, Canavan, Pinkney, Siong, Sramko)
- Roundtable on the ET-GA Exposure Draft hosted by the Australian Accounting Professional & Ethical Standards Board (APESB) (Lee, Wijesinghe, Vijian)
- Presentation at the South African Institute of Chartered Accountants (SAICA) Tech Talk's monthly webinar titled "Ethics in Practice Series" to discuss ethics and technology (Lee)
- Presentation to Colombo University accounting students in Sri Lanka on the importance of the Code for the accounting profession and the restructured Code (Wijesinghe)
- Meeting with Jasna Voje (Policy Officer, DG Taxation and Customs Union), and Adrian Kelly, European Commission (Poll, Endsley, Wijesinghe, Vijian)
- Presentation at the PwC Global Ethics and Compliance Professionals meeting (Dias, Endsley, Siong, Jules)
- US outreach, New York and Washington DC:
    - Meeting with Wallace (Wally) Gregory (Global Regulatory, Independence & Conflicts Leader) and Denise Canavan (Global Independence Leader), Deloitte (Dias, Siong, Jules)
    - Meeting with Colleen Conrad (Executive VP and COO), National Association of State Boards of Accountancy (NASBA) (Dias, Siong, Jules)
    - Meeting with Jeff Mahoney (General Counsel), Council of Institutional Investors (CII) (Dias, Siong, Jules)
    - Podcast interview with Council of Institutional Investors, *The Voice of Corporate Governance* (Dias)
    - Meeting with Toni Lee Andrews (Director Professional Ethics), Ellen Goria (Associate Director, Professional Ethics), and Samantha Miller (Reputation Team Member), AICPA (Dias, Siong, Jules)
    - Meeting with Julie Bell Lindsay (CEO), Dennis McGowan (Vice President, Professional Practice) and Vanessa Teitelbaum (Senior Director, Professional Practice), US Center for Audit Quality (Dias, Siong, Jules)
    - Meeting with Paul Munter (Acting Chief Accountant), Nigel James (Senior Associate Chief Accountant), Anita Doutt (Senior Associate Chief Accountant), Jasdeep Mangat (Associate Chief Accountant), Vassilios Karapanos (Associate Chief Accountant), Sarmad Makhdoom (Associate Chief Accountant), Robert Choromanski (Professional Accounting Fellow), Meagan Van Orden (Professional Accounting Fellow), and Samantha Demty (Professional Accounting Fellow), US Securities and Exchange Commission (SEC) (Dias, Siong, Jules)
    - Meeting with Tone Maren Sakshaug (Partner and Global IFAC Independence Center Leader), Brian Lynch (Partner and Regional Independence Leader for Americas FSO and AICPA Professional Ethics Executive Committee Chair), Sylvie Soulier (Partner and Global Independence Leader for Asia Pacific), Gaeron McClure (Partner and US and Americas Independence Leader), Katherine Fritts (Partner and Global Tax Quality Leader), Diane Larsen (Partner and Global Professional Practice and IAASB Board member), and Katie Kummer (Partner and Global Public Policy Leader), EY (Dias, Huesken, Siong, Jules)

  - Virtual Meeting with Barbara Vanich (Acting Chief Auditor), Stephanie Hunter (Assistant Chief Auditor), Marc Joseph (Assistant Director), David Hardison (Associate Counsel), and Dani Verbeck (Assistant Chief Auditor), US Public Company Accounting Oversight Board (PCAOB) (Dias, Siong, Jules)

- Meeting with Accountancy Europe's Professional Ethics and Competences Working Party (PEC) and the Corporate Reporting & Digitalisation Task Force (CRDIGI) to discuss the IESBA's Technology Exposure Draft (Huesken, Nisoli, Fukukawa, Driscoll, Barbour,[2] Siong, Jules, Leung)
- IESBA-National Standard Setters (NSS) meeting (Dias, Lee, Babington, Friedrich L., Siong, Jules, Kwan, Leung, Vijian, Sramko)
- Update on the IESBA's sustainability initiative to the Global Public Policy Committee (GPPC) (Babington, Siong)
- IESBA webinar on Instilling Public Trust and Confidence in Sustainability Reporting and Assurance with guest speaker Sacha Sadan (Director of ESG), UK Financial Conduct Authority (Dias, Babington, Siong, Jules, Sramko)
- Meeting with Dr. Stavros Thomadakis, former IESBA Chairman, to discuss matters relating to the IESBA's Tax Planning project (Poll, Chaudhary, Endsley, Wijesinghe, Siong, Vijian)
- Presentation to the NYSSCPA on the IESBA's Strategy Survey (Endsley, Jules)
- Meetings with IOSCO and IAASB to discuss sustainability reporting and assurance (Dias, Babington, Siong, Jules, Sramko)
- Meeting with Rodrigo Buenaventura, Chair of the Spanish CNMV and Chair of the IOSCO Sustainability Task Force W1 – Reporting and Disclosure – Madrid, Spain (Dias)
- Meeting with Carlta Vitztum (Head of Communications), IOSCO – Madrid, Spain (Dias)
- IESBA global webinar on the revisions to the Definitions of Listed Entity and Public Interest Entity in the Code (Ashley,[3] Mintzer, Kwan)
- Meeting with representatives of the Abu Dhabi Accountability Authority (Clark, Kwan)
- The Accountant Article, *An Actionable Guide to Diversifying Global Accounting Talent for the Profession's Future* (Jules)
- IFAC Gateway Article, *Three Catalysts for Change and Seventy-Nine Actionable Practices to Progress DE&I in the Accounting Profession* (Jules)
- Meeting with Albert Baker, Tax Partner, Deloitte, to discuss matters relating to the IESBA's Tax Planning project (Poll, Chaudhary, Endsley, Mintzer, Wijesinghe, Siong, Vijian)
- Meeting with Beena Ammanath, Executive Director, Global Deloitte AI Institute, to discuss ethics and technology (B. Friedrich, Borgerth, Nisoli, Kramerius, Takwani,[4] Jules, Leung)
- Meeting with representatives of IFAC's International Education Panel on Accountancy Education, to discuss ethics and technology (B. Friedrich, Jules)

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2 Mr. James Barbour, former IESBA Technical Advisor and member of the Technology Task Force

3 Mr. Mike Ashley, former IESBA Member and IESBA Public Interest Entity (PIE) Task Force Chair

4 Mr. Sundeep Takwani, former IESBA Technical Advisor and member of the Technology Working Group

June

- Presentation on IESBA's Sustainability initiative at IFAC's Public Policy & Regulation Advisory Group Meeting (Siong)
- Meeting with representatives of the Global Reporting Initiative (GRI) alongside IAASB Chair and staff to discuss matters relating to sustainability reporting and assurance (Dias, Poll, Siong, Jules, Sramko)
- Roundtable on External Audit and Sustainability Assurance hosted by the Financial Stability Board, Madrid, Spain (Dias, Gunn)
- Meeting with Monitoring Group (Dias)
- Presentation at IFAC Board Meeting (Dias, Gunn, Siong)
- Panelist at the 8th Annual Global Corporate Governance Colloquium (GCGC) hosted by the University of Oxford to discuss "Embedding Purpose into Regulatory Frameworks" (Dias)
- Meeting with António Lagartixo, CEO, Deloitte Portugal – Lisbon, Portugal (Dias)
- Keynote speaker at the Malaysian Institute of Accountants (MIA) webinar series "Creating A Culture of Ethics" to discuss "Professional Competence and Due Care" (Lee)
- IFAC-ACCA "Trust in Tax – Global Perspectives" Latin America Roundtable (Borgerth)
- Meeting with Hilary Eastman, Head of Global Investor Engagement, PwC (Dias, Siong, Jules)
- IESBA update at the Forum of Firms meeting (Jules)
- Joint IESBA-IAASB meeting with representatives of the IOSCO Sustainable Finance Task Force (Siong, Jules)
- Presentation to the Organisation for Economic Cooperation and Development's (OECD) Tax and Other Crimes Task Force on *the Role of Professional Associations in Fighting Enablers of Tax Crimes and Other Financial Crimes* (Dias, Lee, Vijian)

July

- Outreach to Abu Dhabi Accountability Authority and other Middle-East stakeholders – Abu Dhabi (Lee, Clark, Kwan)
- Article in the July 2022 Special Edition of the Institute of Chartered Accountants of India (ICAI) Journal, *The Chartered Accountant* (Dias)
- Panelist at the G20-OECD Corporate Governance Forum to discuss "The role of corporate governance in improving sustainability and resilience in the business sector" – Bali, Indonesia (Dias)
- Interview by CPA Australia's Ethical and Professional Standards Chair, Brendan O'Connell titled "Ten Questions with the APESB" on professional and ethical standards (Wijesinghe)
- Meeting with Ahmed Al-Shangiti (Chair, Ethics Committee), and Dr. Yasser Fallatah and Waleed Alzayyad (Ethics Committee representatives), Saudi Organization for Chartered and Professional Accountants (SOCPA), to discuss implementation of the IESBA's International Independence Standards on non-assurance services (NAS) and fees (Clark, Siong, Sramko)
- Meeting with Flavio Martins, Tax Auditor of the Federal Revenue of Brazil, and Rafael Dinoa, Tax Lawyer, to discuss matters relating to the IESBA's Tax Planning project (Poll, Borgerth, Chaudhary, Endsley, Mintzer, Wijesinghe, Siong, Vijian)

August

- Presentation at Crowe Global Conference (Poll)
- Presentation to the joint Stanford / IEEE "Advancing Technology for a Sustainable Planet" workshop (B. Friedrich, L. Friedrich)
- Meeting with Michele Wood-Tweel (VP Regulatory Affairs) and Sarah Anson-Cartwright (Chief of Policy and Advocacy), CPA Canada, to discuss global adoption and implementation of the NOCLAR provisions of the Code (Siong, Kwan)
- Meeting with Wellington Cruz (Vice President), Conselho Federal de Contabilidade (CFC), and other CFC representatives Felipe Bastos and Monica Foerster to discuss matters relating to the IESBA's Tax Planning project (Poll, Borgerth, Chaudhary, Endsley, Wijesinghe, Siong, Vijian)
- Seminar for the Thai Federation of Accountants (TFAC) and the Thailand Securities Exchange Commission on the revised NAS, Fees and PIE pronouncements (Lee)
- Interview in AB magazine, "Accountancy Gets and Ethics Injection" (Dias)
- Article for the Malta Institute of Accountants' magazine, "Accounting – A Force for Positive Change" (Dias)

September

- Meeting with Bruce Dorris (President and CEO), Anil Narayan, Director (Global Engagement), Kevin Taparauskas (VP Communications) and Andi McNeal (VP Education, Research and Thought Leadership), Association of Certified Fraud Examiners (ACFE) (Dias, Clark, Siong and Leung)
- Video address at the 21st Turkish Accountancy Congress organized by the Union of Chambers of Certified Public Accountants of Turkey (TÜRMOB) (Dias)
- Presentation to the Institute of Chartered Accountants of Nigeria (ICAN) US conference on IESBA activities (Jules)
- IESBA CAG meeting (Dias, Lee, Borgerth, Poll, Friedrich B., Babington, Huesken, Gunn, Siong, Jules, Kwan, Kaneda, Leung, Leal, Sramko, Vijian)
- Meeting with representatives of the Association of Certified Fraud Examiners (ACFE) (Dias, Siong, Clark, Leung)
- US outreach, Washington DC and New York
    - Meeting with Andres Vinelli (Chief Economist), Paul Andrews (Managing Director, Research, Advocacy and Standards), and Leilai Hall (Senior Head, Codes and Standards), CFA Institute (Dias, Jules, Kwan)
    - Meeting with Claudius Modesti (Partner, former federal prosecutor and SEC Enforcement Attorney and former PCAOB Director of Enforcement), Akin Grump Straus Hauer & Feld (Dias, Jules, Kwan)
    - Meeting with Simon Bradbury (Chief Accountant) and George Mubanga Kabwe (Division Chief), International Monetary Fund (Dias, Jules, Kwan)
    - Meeting with Juan Carlos Serrano Machorro (Sr. Financial Management Specialist) and Joseph Kizito (Governance Practice Manager for the Latin America and the Caribbean Region), World Bank (Dias, Jules, Kwan)

  - Meeting with Sue Coffey, CEO – Public Accounting, AICPA (Dias, Siong, Jules, Kwan)
- Video interview with Colleen Conrad, Executive Vice President and COO, NASBA – Nashville, USA (Dias)
- Meeting with representatives of NASBA to discuss matters relating to technology, ethics, and the evolving accounting curriculum (B. Friedrich, Leung)
- Panelist on the topic of "Green Markets, Investment and Sustainable Ethics" at the Portuguese Chartered Accountants Association's (OCC) Congress (VII Congresso dos Contabilistas Certificados) – Lisbon, Portugal (Dias)
- Interview with CPA Canada's Pivot magazine for the September/October feature "Fact or Fiction" (B. Friedrich, L. Friedrich)
- Meeting with Martijn Duffels, Senior Supervision Officer, Netherlands Authority for the Financial Markets (AFM), to discuss AFM's position paper on fraud, "AFM expects auditors to better fulfill their gatekeeping role with regard to fraud" (Dias, Siong, Leung)
- Roundtable discussion at the Academy of European Law's (ERA) Annual Conference on Law and Sustainable Finance in relation to the implementation of sustainability standards and ESG compliance in financial services, investments, value-chains, and banking – Trier, Germany (Poll)
- Fireside chat at the World Federation of Exchanges' (WFE) Annual Meeting – Malta (Dias)
- IFAC PAIB Advisory Group meeting (Siong, Kwan)

October

- IFAC – Confederation of Asian & Pacific Accountants (CAPA) Global Sustainability Dialogue (Jules)
- Video address at the ASEAN Accountancy Conference on Sustainability (Babington)
- EU outreach, Brussels and Paris:
  - Meeting with Guillaume Prache, Managing Director, The European Federation of Investors and Financial Services Users (Better Finance) (Dias, Siong)
  - Meeting with Jean-Paul Servais, Chair, Belgian Financial Services and Markets Authority (FSMA), and Monitoring Group co-Chair (Dias, Siong)
  - Meeting with Hilde Blomme (Deputy CEO), Liesbet Haustermans (Chair, Professional Ethics and Competences Working Party), and Harun Saki (Manager), Accountancy Europe (Dias, Poll, Siong)
  - Meeting with Tanguy van de Werve, Director General, European Fund and Asset Management Association (EFAMA) (Dias, Poll, Siong)
  - Meeting with Florence Peybernès (Chair) and Marjolein Doblado (Director), H3C (Dias, Siong)
  - Meeting with Verena Ross (Chair) and Natasha Cazenave (Executive Director), European Securities and Markets Authority (ESMA) (Dias, Siong)
- Accountancy Europe Members' Engagement Day session on ethics and taxation (Poll)
- Presentation at the global meeting of Deloitte Risk, Regulatory and Public Policy leaders (Dias)
- Panelist at the IOSCO Annual Conference to discuss "Triple Zero: Zero Exclusion, Zero Carbon, Zero

Poverty – What role can capital markets play in achieving this triple objective" – Marrakech, Morocco (Dias, Siong)

- Meeting with IFIAR SCWG to discuss the ET-GA and Technology projects (Lee, Huesken, Siong, Jules, Kaneda, Leung, Sramko)
- Meeting with IOSCO C1 to discuss the ET-GA Technology projects (Lee, Huesken, Siong, Jules, Kaneda, Leung, Sramko)
- PIOB Public Interest Workshop – Madrid (Dias, Gunn, Siong)
- Panelist at the National Summit of the Tax Institute of Australia to discuss "Changing Landscape for Large Market Tax Advisers" – Sydney, Australia (Wijesinghe)
- IFAC Small and Medium Practices (SMP) Advisory Group meeting – New York (Mintzer, Vijian)
- IESBA Global Panel Discussions on the revisions to the Code relating to the definitions of listed entity and public interest entity (Mintzer, Lee, Huesken, Kim, Muvunyi, Nisoli, Wijesinghe, Wu, Kwan)
    - October 12 Meeting (Co-hosted with IFAC and ASEAN Federation of Accountants)
    - October 20 Meeting (Co-hosted with Pan African Federation of Accountants)
- Panelist at the 2022 IFAC EdExchange: The Future of Technology in Accounting summit to discuss ethics, integrity and anti-corruption in technology (B. Friedrich)
- Presentation at the Indonesian Institute of Certified Public Accountants (IAPI)'s webinar titled "Ethical Challenges and Opportunities Arising from Evolving Technologies" (Lee)

November

- Panelist at the Wyman Symposium hosted by Institute of Chartered Accountants in England and Wales (ICAEW) to discuss "Regulation of the Tax Profession – Is It the Way Forward?" – London, UK (Poll)
- Panelist at the World Congress of Accountants to discuss "Accountancy Profession: Trusted Partner in Sustainability and Society" and "The Global Standard Setting Landscape for Sustainability" – Mumbai, India (Dias, Kwan)
- Presentation to the AICPA Professional Ethics Executive Committee to discuss the Technology Working Group's Phase 2 Final Report (B. Friedrich)