



Global Infrastructure Initiative

2022 GII Summit Agenda

Palace Hotel, Tokyo (*all times Japanese Standard Time*)

Wednesday, October 19

07:00 REGISTRATION OPENS

10:00–14:00 TOKYO INFRASTRUCTURE SITE VISITS

Integral to the Global Infrastructure Initiative (GII) program are infrastructure site visits, allowing participants to experience how infrastructure is planned, financed, delivered, and operated at some of Tokyo's leading organizations. Please note that availability is limited and for Summit participants only.

- **AHEAD Hydrogen Project** – This hydrogen demonstration project is part of Japan's New Strategic Energy Plan to accelerate efforts toward the use of hydrogen in everyday life and industrial activities. It aims to solve transportation and storage challenges in the hydrogen energy supply chain via the organic chemical hydride method, utilizing Chiyoda's proprietary catalyst technology. AHEAD successfully demonstrated the world's first international hydrogen supply chain in December 2020, subsidized by the New Energy and Industrial Technology Development Organization (NEDO). <http://www.ahead.or.jp/en/>
*AHEAD was established in 2017 in collaboration with Chiyoda Corporation, Mitsubishi Corporation, Mitsui & Co., Ltd., and Nippon Yusen Kabushiki Kaisha.
- **Narita International Airport.** Narita International Airport is Japan's busiest airport in international passenger traffic and cargo volume, featuring two runways and three passenger terminals. The airport plans to extend Runway B (from 2,500m to 3,500m) and construct a new Runway C (3,500m) by the end of FY2028. They also plan to revamp the terminal buildings and improve transportation access in response to industry shifts. Visitors will learn about Narita's development plans at a control tower and observe "Face Express," the airport's new approach to facial recognition-based boarding. <https://www.narita-airport.jp/en>
- **Tokyo Metro Comprehensive Learning and Training Center.** Tokyo Metro operates 9 subway lines comprising 195 km and 180 stations, serving approximately 5.22 million passengers per day. With customer safety as the top priority, programs are conducted daily at the dedicated Center to ensure train operation with world-class short intervals, safety within the subway's unique and demanding environment, and service improvements. The Center opened in 2016 on a 27,000 m² site and integrates 700 meters of lines, mock-up stations, and platforms, as well as training facilities for various railroad departments.
https://www.tokyometro.jp/lang_en/index.html

- **Toranomon-Azabudai Project.** This multi-purpose development will create a modern green city within a city. The project aims to seamlessly weave offices, residences, a hotel, an international school, retail shops, restaurants and cultural facilities into the fabric of everyday life, encompassing work, learning, recreation, interaction and relaxation. After 30 years of planning, this major project, sited on 8.1 hectares in the center of Tokyo, broke ground in August 2019 and will be completed in 2023. https://www.mori.co.jp/en/projects/toranomon_azabudai/
- **Toyosu Smart City.** Shimizu Corporation is expanding the urban digital infrastructure in the Toyosu area, which is central to the district's Smart City project and service areas. The building operating system, "DX-Core," is similar to a smartphone OS and integrates and controls IoT data collected from buildings in real-time. The urban OS plays important roles in the urban digital infrastructure. Visitors will see facilities and equipment that apply the building OS and will be introduced to the urban development initiatives of Shimizu Corporation, which aspires to be a "digital general contractor" that creates both physical and cyber spaces.
<https://toyosu-smartcity.com/>
- **Yamato Logistics Terminal.** Haneda Chronogate is the advanced logistics facility of Yamato Transport. As Yamato's largest logistics terminal, it sorts up to 48,000 parcels per hour and connects the logistics network with the rest of Asia and the world. This facility enables transportation by land, sea and air across a range of 24/7 functions, including fast-track customs clearance, bonded storage/localization, cross-merging, medical device cleaning/maintenance, kitting, assembly, home appliance maintenance and repair, and on-demand printing. <https://www.yamato-hd.co.jp/facilities/en/haneda-chronogate/about.html>

15:00–15:10 WELCOME AND FRAMING

Hosts:

Kenji Nabeshima, Partner, McKinsey & Company

Shannon Peloquin, Partner, McKinsey & Company; Co-chair, GII

15:10–15:30 PRIORITIZING THE PATHWAY TO SUSTAINABLE INFRASTRUCTURE

The combined impacts of COVID-19 and net-zero commitments have resulted in an unprecedented disruption of the \$11.6 trillion global infrastructure industry. Meeting net-zero targets will require the industry to transform project development and delivery to deliver a global portfolio of projects at an unprecedented scale and pace. What are the pivotal actions we need to take now to enable sustainable infrastructure for the decades to come?

Facilitators:

Tip Huijzena, Senior Partner, McKinsey & Company; Co-chair, GII

Detlev Mohr, Senior Partner, McKinsey & Company; Co-chair, GII

15:30—16:05 COLLABORATING TO MEET NET-ZERO GOALS

Achieving net-zero carbon emissions goals will require deep commitment and a collaborative approach from both the public and private sectors. Leaders can break the

first-mover stalemate by forming or joining coalitions that address unmet needs and help set the rules for a more orderly net-zero transition. In a specific sector or industry, how can stakeholders across the value chain collaborate to succeed? How do we get beyond the limitations of short-term political cycles, and what can we learn from where collaboration is working?

Panelists:

Sir Danny Alexander, Vice President Policy & Strategy, Asian Infrastructure Investment Bank

Marie Lam-Frendo, Chief Executive Officer, Global Infrastructure Hub

Cindy Lim, Chief Executive Officer, Keppel Infrastructure

Moderator: **Detlev Mohr**, Senior Partner, McKinsey & Company; Co-chair, GII

16:05–16:40 BUILDING A DIGITAL-FIRST INDUSTRY

The imperative to improve industry productivity and customer experience through digitization is stronger than ever. Leaders acknowledge that the industry must augment experience-based decision-making with data-driven methods—but change is slow and success stories at scale are few. What can we learn from lighthouse examples inside and outside the industry? What is the right alchemy of leadership, talent, investments, and partnerships to go from pilots to business-as-usual?

Panelists:

Paolo Gallo, Chief Executive Officer, Italgas

Philip Hoare, President, Engineering Services, SNC-Lavalin

Jennifer Lin, Chief Platform Officer, Trimble

Moderator: **Prakash Parbhoo**, Partner, McKinsey & Company

16:40–16:50 INSPIRING IDEA: THE NET-ZERO TRANSITION: WHAT WILL IT TAKE?

As global climate commitments ramp up, countries and companies are grappling with how to reach net-zero emissions by 2050. The magnitude of the economic transformation that a transition to net-zero emissions would entail will affect all countries and all sectors of the economy. What would such a transition cost? What would it take to fulfill that ambition, and what could it bring to the world?

Presenter: **Mekala Krishnan**, Partner, McKinsey & Company

16:50–17:25 DEVELOPING THE WORKFORCE CAPACITY TO DELIVER

Post-pandemic recovery, compounded by the net-zero imperative, is causing significant disruption to the \$11.6 trillion global infrastructure industry. The challenge of increasing capacity to meet these new demands is heightened by an aging workforce, tight labor markets, new sustainability criteria, and technological advances. How can the global workforce be expanded to meet the anticipated increase in demand? What actions can organizations take to correct long-standing barriers to productivity? How can collaboration ease the pressure?

Panelists:

Adrian Dwyer, Chief Executive Officer, Infrastructure Partnerships Australia

Kevin Klowden, Chief Global Strategist, The Milken Institute

Sean Strickland, Executive Director, Canada's Building Trades Union

Moderator: **Danielle Bozarth**, Senior Partner, McKinsey & Company

17:25–18:00 TRANSFORMING THE PROJECT PORTFOLIO TO ACHIEVE NET-ZERO TARGETS
Decarbonization and net-zero targets will require asset portfolios that prioritize sustainability and resilience, in addition to a robust business case. Asset owners will need to reevaluate their current asset base, exit some assets, and build a pipeline of new net-zero investments fast. What opportunities for synergies are presented by the size and duration of the expected net-zero portfolio? How can new approaches to portfolio-based risk management improve risk allocation and improve predictability?

Panelists:

Emmanuel Jaclot, EVP and Head of Infrastructure, CDPQ

Verena Lim, CEO, Asia, Macquarie Group

Yukio Kani, Corporate Vice President, Managing Executive Officer, JERA

Moderator: Steffen Fuchs, Senior Partner, McKinsey & Company

18:00–19:00 WELCOME RECEPTION

19:00–21:30 DINNER AND KEYNOTE DISCUSSION

Welcome: Axel Karlsson, Senior Partner, McKinsey & Company

Speaker: Tadashi Maeda, Managing Director, Chairman of the Board of Directors, Japan Bank for International Cooperation

Moderator: Maya Horii, Senior Partner, McKinsey & Company

21:30 NIGHTCAP

Thursday, October 20

06:30–07:30 SUNRISE ACTIVITY (optional)

Option 1: Imperial Palace Jog (5km)

One of Tokyo's most popular running routes, this 5-kilometer jog makes a circuit around the Imperial Palace. The route is flat, paved, and uninterrupted, and passes the National Diet (Legislature) Building, the Tokyo Police Headquarters, and the Justice Ministry.

Option 2: Yoga at Palace Hotel

08:30–09:30 DISCUSSION SESSIONS

Participants select one of four concurrent pillar discussion sessions:

1: ORCHESTRATING THE ENERGY TRANSITION

A successful decarbonization and energy-transition strategy will need to accommodate new regulations; rethink planning, permitting, and prioritization; leverage new skills, technology, and capital; and adopt an unprecedented sense of urgency to deliver at the required scale and pace. What steps should senior leaders from across the value chain take now to plan and accelerate the transition? How do we gear up for an anticipated tripling of the current pace of construction to meet net-zero targets?

Panelists:

Peter Aschenbrenner, Chief Strategy Officer, Maxeon Solar Industries

Nicole Lockwood, Chair, Infrastructure WA

Rajiv Ranjan Mishra, Managing Director, Apraava Energy

Moderator: Zak Cutler, Partner, McKinsey & Company

2: MEET THE DISRUPTORS: UNLOCKING THE POWER OF THE ECOSYSTEM

Innovation in InfraTech, ConTech, and PropTech has exploded in the last 3 years, with investment more than tripling. How do industry players harness the power of this ecosystem through partnerships and corporate ventures? What can owners and the supply chain learn from startups who are disrupting the industry (and vice versa)? What moves can startups and investors make to accelerate adoption and impact?

Panelists:

Dev Amratia, Chief Executive Officer, nPlan

Roz Buick, SVP, Construction & Engineering Global Business, Oracle

Bill Cox, Chief Executive Officer, Aurecon

Kaustubh Pandya, Partner, Brick & Mortar Ventures

Moderator: David Rockhill, Partner, McKinsey & Company

3: DEFINING THE ROLE OF LEADERSHIP IN THIS NEW ERA

Meeting the twin challenges of increasing organizational capacity and capabilities, while improving productivity, will require a new approach to leadership. But what is the role of a leader in this era? How should leaders spearhead their organizations through cultural shifts as the nature of business evolves? What changes to the traditional roles of owners, suppliers, and service providers might help optimize performance? How should leaders change the way they prioritize investments, and assess risk and return?

Panelists:

Yves Padrines, Chief Executive Officer of the Nemetschek Group

Omar Shahzad, Group Chief Executive Officer, Meinhardt Group

Greg Stanmore, Partner and Head of Global Infrastructure Practice, Spencer Stuart

Moderator: Richard Westney, Senior Advisor, McKinsey & Company

4: STANDARDIZING PROJECTS FOR SCALE AND SPEED

Delivering on net-zero—a \$130 trillion portfolio of energy and infrastructure projects in just 28 years—requires rapid acceleration of project development and delivery. Simply relying on past best practices will not get the job done; success requires transformation of systemic inefficiencies and a dramatic reduction of the typical project life cycle. How can the industry standardize design and delivery processes to help meet this goal? Using a portfolio lens, what approaches could significantly shorten the investment decision process without increasing risk? What practices and mindsets can we learn from other industries to expedite delivery?

Panelists:

Shaun Kenny, President Infrastructure, Bechtel

Catherine Li, Chair, International Infrastructure Forum; former CEO, Atkins APAC

Khaled Naja, EVP, Infrastructure & Development, Dallas Fort Worth Airport

Gianluca Racana, Director, Zaha Hadid Architects

Moderator: Robert Palter, Senior Partner, McKinsey & Company

09:55–10:00 WELCOME BACK

10:00–10:35 INNOVATING FINANCING MODELS TO REALIZE NET-ZERO PORTFOLIOS

Project strategies and plans are heavily influenced by the financing models employed. With new alliances forming to accelerate decarbonization, this could be the optimal time for infrastructure leaders to rethink their financing models. How do owners and investors need to change their expectations and the constraints for project development and delivery? What changes do contractors need to make to improve predictability and reduce lender and investor risk? What models would allow rapid scaling of net-zero portfolios?

Panelists:

Scott Jacobs, Chief Executive Officer, Generate Capital

Ashok Lavasa, Vice-President for Private Sector Operations and Public-Private Partnerships, Asian Development Bank

Anne Valentine Andrews, Global Head of Real Assets, BlackRock

Moderator: Aaron Bielenberg, Partner, McKinsey & Company

10:35–11:10 BUILDING CYBER RESILIENCE

Cyberattacks on critical infrastructure, such as the Colonial Pipeline, are increasing in frequency and size. Concurrently, infrastructure operators are implementing new technologies that increase efficiencies, but these could also make their assets more vulnerable to cyberattacks. How can the industry embrace digital adoption while managing cyberthreats? What can be done about zero-day exploits—that is, cyberattacks that occur the same day a vulnerability is discovered by a hacker? What preventive strategies might reduce downtime?

Panelists:

Mark Fialkowski, President Mobility Solutions, Parsons

Marc Ganzi, Chief Executive Officer, Digital Bridge

Shinichi Yokohama, Chief Information Security Officer, EVP Security and Trust, NTT Group

Moderator: Swarna Ramanathan, Partner, McKinsey & Company

11:10–11:20 INSPIRING IDEA: THE GREEN BUSINESS BUILDING OPPORTUNITY

The energy transition presents opportunities for companies to build brand new businesses, ones that create a more sustainable future. Demand for net-zero offerings could generate more than \$12 trillion of annual sales by 2030, with the greatest value found in areas like energy, power transport, and buildings. Where are the fastest-growing opportunities for green business building, and how can leaders transform their businesses and leapfrog to sustainable, inclusive growth?

Presenter: Rajat Gupta, Senior Partner, McKinsey & Company

11:20–11:55 TAKING ADAPTATION SERIOUSLY

While COP26 demonstrated some progress toward decarbonization goals, the course correction has been too slow to minimize the impacts of climate change. Looking ahead, government and business leaders will need to pursue joint mitigation and adaptation strategies. In a distracted world with divisive politics, how can leaders mobilize and prepare the built environment for the physical and transition risks? What are the financial implications, and how can we work together to allocate risk?

Panelists:

Laurent Germain, Chief Executive Officer, Egis
Bambang Susantono, Chairman, Capital City Authority, Government of Indonesia
Anna-Marie Slot, Global ESG Partner, Ashurst
Moderator: Sal Arora, Senior Partner, McKinsey & Company

11:55–12:30 ENABLING EQUITABLE ACCESS TO NEW AND EXISTING ASSETS

Constituents are increasingly asking for more equitable access to infrastructure. In response, governments around the globe are adding social equity metrics to their selection criteria for funding and approving infrastructure development projects. Given the heightened focus on social equity, how do owners and investors need to change their approach and expectations for project development and delivery? How can decision makers incorporate social equity in the planning phase of projects? What metrics would help measure progress?

Panelists:

Avery Bang, Co-founder and Board Member, Bridges to Prosperity
Jacqui Gooch, Head of Transport and Public Works, Western Cape, South Africa

Gord Johnston, President & CEO, Stantec

Moderator: Shannon Peloquin, Partner, McKinsey & Company; Co-chair, GII

12:30–14:00 LUNCH

14:00–15:15 SOLUTION SESSIONS

Participants will select one of four concurrent pillar solution sessions, each focusing on a major global project or infrastructure challenge. A senior executive from the organization will spend 15-minutes introducing the project and framing its biggest challenges. The participant group, representing deep expertise from around the world, will spend the remaining time in a facilitated discussion, solving for these challenges.

1: ENABLING THE UK'S ENERGY TRANSITION

The United Kingdom has committed to sourcing 100 percent clean energy by 2035, but delivering on this goal while supplying safe, affordable, and reliable power is complicated. Energy systems that have long relied on fossil fuels must transform to run on clean energy—ramping up renewables and embracing new, sustainable technologies. What is the optimal resource portfolio across generation, demand, and storage? What network and systems need to be in place to get clean energy to consumers when they need it? What market reform is required to encourage the right investments and ensure consumer value?

Discussion leader: Fintan Slye, Executive Director, National Grid ESO

Facilitators:

Zak Cutler, Partner, McKinsey & Company

Koen Vermeltoort, Partner, McKinsey & Company

2: REALIZING THE SUSTAINABILITY TRANSFORMATION THROUGH DIGITAL STRATEGY

Improving climate performance in the built environment will require a ruthless reassessment and transformation in design, logistics, and supplier engagement, combined with a dramatic increase in the pace and productivity of construction. The digital tools exist so how do we design and implement a digital strategy that will enable

this transformation? What accompanying changes will be required to technology funding, risk management, and commercialization?

Discussion leader: **Menno de Jonge**, Director Digital Delivery, NEOM

Facilitators:

Shankar Chandrasekaran, Partner, McKinsey & Company

David Rockhill, Partner, McKinsey & Company

3: BUILDING THE WORKFORCE FOR THE NEXT DECADE

The career opportunity of applying new technology to achieve net-zero targets on critical infrastructure could be an appealing proposition to the next generation of infrastructure leaders. What new skills and capabilities will be essential to shape and safely deliver this next generation of projects? How do the industry's needs align with the priorities of new workforce demographics? How can the industry harness the power of diversity and inclusion, and what role do project owners play in supporting workforce development goals?

Discussion leaders:

Barry Lewis, Managing Director, ALEC

Kez Taylor, Chief Executive Officer, ALEC

Facilitators:

Garo Hovnanian, Partner, McKinsey & Company

Richard Westney, Senior Advisor, McKinsey & Company

4: FUTURE-PROOFING THE EV BATTERY SUPPLY CHAIN TO MEET NET-ZERO TARGETS

The global EV market has seen dramatic growth over the past decade but, to meet net-zero targets, the industry will need to ramp-up battery manufacturing and EV charging infrastructure. What steps should battery manufacturers be taking now to mobilize a stable demand and supply for all required resources—skilled labor, materials, manufacturing capacity, and technology. How can battery manufacturers achieve net-zero manufacturing? What actions are required by the industry to create a viable battery recycling business model and value chain?

Discussion leader: **Shoichi Matsumoto**, Chief Executive Officer, Envision AESC

Facilitators:

Takehito Sumikawa, Senior Partner, McKinsey & Company

Masaru Tsuchiya, Associate Partner, McKinsey & Company

15:40–15:50

INSPIRING IDEA: DELIVERING THE GLOBAL HYDROGEN SUPPLY CHAIN

The production and trade of clean hydrogen and its derivatives creates a multi-billion-dollar opportunity to connect cost-competitive sources of clean energy with industry and cities. Developing this opportunity will require creating the ecosystem and enabling the efficient delivery of hundreds of major projects. This session will share the latest perspectives on the hydrogen opportunity and unpack the most promising levers to reduce project delivery costs by up to 30 percent.

Presenter: **Markus Wilthaner**, Partner, McKinsey & Company

15:50–16:20

KEYNOTE INTERVIEW

Speaker: **Oleksandr Kubrakov**, Minister of Infrastructure, Ukraine

Moderator: **Detlev Mohr**, Senior Partner, McKinsey & Company; Co-chair, GII

16:20–16:45 BEST IDEAS AND COMMITMENTS

Recap of the best ideas, insights, and commitments from the 2022 GII Summit
Hosts:

Tip Huizenga, Senior Partner, McKinsey & Company; Co-chair, GII
Shannon Peloquin, Partner, McKinsey & Company; Co-chair, GII

16:45–16:50 CLOSING**18:30–21:00 NETWORKING DINNER (JAPANESE THEME)****Friday, October 21****09:00–12:00 SECTOR ROUNDTABLES**

GII will host five concurrent sector roundtables, encouraging participants to take a more in-depth look at the most exciting topics in specific sectors.

1: ENERGY AND RESOURCES: ACHIEVING EXCELLENCE IN THE RACE TO NET-ZERO

The transition to net-zero will require a massive step-up in capital programs for energy and resources companies. Leaders are quickly realizing these capital programs are large, complex, and rife with new challenges—putting capex and engineering functions squarely on the CEO agenda. And new economic realities, such as rising carbon prices, are intensifying pressure to deliver projects fast and on time. This roundtable will tackle key priorities for energy and resources executives looking after capital projects, including:

- What levers will create real step-change in refreshing and resetting capital strategies to advance net-zero outcomes?
- What strategies can shape a strong delivery ecosystem and setup projects for success?
- How can capital project leaders achieve predictive transparency, navigate regulatory and stakeholder complexities, and build distinctive teams?

Opening speaker: Shin Hosaka, Commissioner, Agency for Natural Resources and Energy, METI

Panelists:

Shin Hosaka, Commissioner, Agency for Natural Resources and Energy, METI

Vinayak Pai, CEO and MD, Tata Projects

Tariq Taherbhai, Chief Operating Officer, Global Construction & Infrastructure, Aon

Kohei Amakusa, Head of Market Development for Japan, Orsted

Hosts:

Mike Gootman, Associate Partner, McKinsey & Company

Piotr Pikul, Partner, McKinsey & Company

Koen Vermeltfoort, Partner, McKinsey & Company

2: ENGINEERING, CONSTRUCTION, AND BUILDING MATERIALS: DECARBONIZING THE BUILT ENVIRONMENT

Global net-zero goals will not be met without decarbonizing construction at pace and scale. Today, the construction value chain accounts for nearly a third of emissions, including embodied and operational carbon. Moving to net-zero will present complex challenges – as well as new opportunities for value. This roundtable will focus on the path to net-zero construction, including:

- Which technologies and trends will accelerate decarbonization?
- How will value pools and prices shift due to the near-term shortage of low-carbon materials?
- How should leaders quantify the embodied and operational emissions of capital projects?
- What new actions and collaboration models are required for long-term success?

Inspiring case studies

Dev Amratia, Chief Executive Officer, nPlan

Jim Dunn, President, Stack Modular

Mika Kaneko, Executive Officer & Director of Environmental Strategy, Shimizu

Panelists:

Richard Freer, Asia Pacific Regional President, Bechtel

Mika Kaneko, Executive Officer & Director of Environmental Strategy, Shimizu

Gernot Strube, Co-founder, Home.Earth

Kelvin Wong, Chief Executive Officer, Building & Construction Authority, Singapore

Hosts:

Focko Imhorst, Partner, McKinsey & Company

David Rockhill, Partner, McKinsey & Company

3: HYDROGEN ROUNDTABLE: DELIVERING HYDROGEN GIGAPROJECTS

The infrastructure to build the hydrogen economy—large-scale renewable energy plants, electrolysis, reformers, pipelines, ports and more—will require a fresh approach to project development, delivery, and operation capabilities, along with billions in capital. This roundtable will bring together leaders from across the hydrogen value chain to discuss:

- How can project design and delivery be optimized?
- What can the hydrogen industry learn from energy and other infrastructure sectors?
- What collaboration models lead to the most successful outcomes?
- How can these projects be structured across their lifecycle to lower their cost of capital?

Inspiring case studies

Michael Masterman, Founding Executive Director (2020 – July 2022), Fortescue Future Industries

Motohiko Nishimura, Executive Officer and Deputy General Manager of Hydrogen Strategy Division, Kawasaki Heavy Industries

Sunil Patil, Senior Director, Aspen Technology

Panelists:

Bill Brown, Founder & Chairman, 8 Rivers Capital

Narsingh Chaudhary, EVP & Managing Director Asia Pacific, Black & Veatch

Dan Feldman, Global Head of Energy Innovation, Shearman & Sterling

Valery Tubbax, Chief Financial Officer, InterContinental Energy

Hosts:

Zak Cutler, Partner, McKinsey & Company

Tip Huizenga, Senior Partner, McKinsey & Company

Yoshitaka Uriuda, Associate Partner, McKinsey & Company

Markus Wilthaner, Partner, McKinsey & Company

4: INFRASTRUCTURE INVESTMENT: NAVIGATING THE TRANSITION TO NET-ZERO PORTFOLIOS

With multiple countries and companies committing to net-zero by 2050, policy-makers, investors, and asset owners have their work cut out for them. Transitioning infrastructure portfolios is complicated as they often consist of multiple asset types across geographies, each with distinct carbon footprints, decarbonization and legislative approaches being required. Building on the work undertaken by McKinsey and the Global Infrastructure Investor Association, this roundtable will tackle:

- What steps do asset owners and investors need to take to manage risk?
- How do stakeholders realize the opportunities presented by net-zero commitments?
- What would the decarbonization pathways and costs look like per asset class?

Inspiring case studies:

Jean-Marc Arbaud, President & CEO, CDPQ Infra

Neil Arora, Head of Asian Energy Transition, KKR

Ivan Varughese, Head of Infrastructure & Energy Capital, Asia-Pacific, Macquarie Group

Panelists:

Gautam Bhandari, Managing Partner, I Squared Capital

Masahiko Kato, Managing Director and Head of Infrastructure Japan, EQT Partners

Tom Osborne, Executive Director – Infrastructure, IFM Investors

Hosts:

Aaron Bielenberg, Partner, McKinsey & Company

Lawrence Slade, Chief Executive Officer, GIIA

Eliav Pollack, Associate Partner, McKinsey & Company

Alex Ugryumov, Partner, McKinsey & Company

5: TRANSPORT INFRASTRUCTURE: HARNESSING NET-ZERO FLEETS

Transportation accounts for one-fifth of global carbon emissions, and net-zero transport fleets are a key component of reducing this footprint. From passenger vehicles to city buses and heavy-duty trucks, questions prevail around how to make such fleets a reality. This roundtable will focus on forging a path forward, including questions such as:

- What needs to be solved to provide net-zero fleet alternatives across vehicle types and use cases?
- What business performance requirements will underpin widespread adoption, and how can various industry players accelerate?
- What infrastructure investments are necessary for a transition to the underpinning fuels, and at what pace or sequence?

McKinsey speaker: **Takehito Sumikawa**, Senior Partner, McKinsey & Company

Panelists:

James Heath, Chief Executive Officer, National Infrastructure Commission

Rolf Erfurt, Chief Operating Officer, Berliner Verkehrsbetriebe

Alexander Loesing, Chief Transformation Officer, Mitsubishi Fuso Truck & Bus Corporation

Moderator: **Swarna Ramanathan**, Partner, McKinsey & Company

Hosts:

Danielle Bozarth, Senior Partner, McKinsey & Company

Jared Katseff, Associate Partner, McKinsey & Company

Shannon Peloquin, Partner, McKinsey & Company

12:00–13:00 NETWORKING LUNCHEON