



# Global Infrastructure Initiative

## **2022 GII Summit Preliminary Agenda**

Palace Hotel, Tokyo (all times Japanese Standard Time)

### **Wednesday, October 19**

- 07:00**      **REGISTRATION OPENS**
- 10:00–14:00**      **TOKYO INFRASTRUCTURE SITE VISITS** *(various off-site locations to be announced)*  
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.
- 15:00–15:15**      **WELCOME AND FRAMING**
- 15:15–15:30**      **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?
- 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—like the Glasgow Financial Alliance for Net Zero—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?
- 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?
- 16:40–16:50**      **INSPIRING IDEA: THE NET ZERO TRANSITION: WHAT WILL IT TAKE?**

- 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?
- 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? What policy changes may be required to remove the barriers to rapid delivery?
- 18:00–19:00    WELCOME RECEPTION**
- 19:00–21:30    DINNER AND KEYNOTE DISCUSSION**
- 21:30            NIGHTCAP**

**Thursday, October 20**

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

**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 policies and 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 be taking 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?

**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?

### **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 in this new era of net-zero, what is the role of a leader? How should they lead the company 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 they change the way they prioritize investments, and assess risk and return?

### **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?

#### **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—like the Glasgow Financial Alliance for Net Zero (GFANZ)—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?

#### **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 the threat of cyberattacks? 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?

#### **11:10–11:20 INSPIRING IDEA**

#### **11:10–11:55 TAKING ADAPTATION SERIOUSLY**

While COP26 demonstrated some progress toward decarbonization goals, the course correction has been too slow to avoid the impacts of climate change. Looking ahead, policymakers and business will need to pursue joint mitigation and adaptation strategies. In a distracted world with divisive politics, how do we convince leaders to trust the science 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?

**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?

**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: DECARBONIZING THE CONSTRUCTION VALUE CHAIN**

The construction value chain accounts for approximately 25 percent of global CO<sub>2</sub> emissions and has a major role to play in realizing global decarbonization and sustainability goals. Players from across the ecosystem have committed to decarbonization—but how can the industry realize this ambitious goal? Which decarbonization measures should we prioritize and why? What actions should we be taking now, and how can stakeholders across the value chain collaborate to succeed?

**2: ENABLING THE SUSTAINABILITY TRANSFORMATION THROUGH DIGITAL STRATEGY**

Achieving net zero will require skillful assessment, prioritization, and the application of digitization and green technologies, combined with a dramatic increase in the pace and productivity of construction. 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? What can we learn from China's pace of construction and innovation over the past decade?

**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?

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

The global EV market has seen incredible growth over the past decade but, to meet net-zero targets, the industry will need to ramp-up battery manufacturing and EV charging infrastructure. For battery manufacturing, leaders will need to mobilize a stable demand and supply for all required resources—skilled labor, materials, manufacturing capacity, and technology. What steps should leading battery manufacturers be taking now to strengthen their supply chains to meet the anticipated demand? How should organizations be thinking differently about risk allocation, supply chain resilience, vertical integration, and collaboration?

**15:40–15:50    INSPIRING IDEA**

**15:50–16:20    KEYNOTE INTERVIEW**

**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

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

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

**16:45–16:50    CLOSING**

**18:30–21:00    DINNER AND ENTERTAINMENT**

**21:00            NIGHTCAP**

#### **Friday, October 21**

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

**08:00–09:00    NETWORKING BREAKFAST**

**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. Additional details to come:*

**1: ENERGY AND RESOURCES**

**2: ENGINEERING, CONSTRUCTION, AND BUILDING MATERIALS**

**3: INFRASTRUCTURE INVESTMENT**

**4: TRANSPORT INFRASTRUCTURE**

**5: URBAN MOBILITY**

**12:00–13:00    NETWORKING LUNCHEON**