



Global Infrastructure Initiative

2023 GII Decarbonizing Mobility Forum Agenda

Sofitel Legend The Grand Amsterdam (all times Central European Standard Time)

Wednesday, September 13

08:30 REGISTRATION OPENS

**10:00–12:00 AMSTERDAM INFRASTRUCTURE SITE VISIT:
ENERGY INNOVATION & THE JOHAN CRUIJFF ARENA**

The city of Amsterdam has one of the world's densest networks of public EV chargers, with grid congestion being a key challenge. The city has recently piloted initiatives in data-driven charging, V2G projects, and flexible energy infrastructure, aimed at rebalancing peaks in energy supply and demand. This site visit will highlight recent efforts in clean energy and mobility, and will take place at the Johan Cruijff Arena, which deploys second-life and new EV batteries for energy storage and grid relief. Participants will tour the Arena's battery storage and engage in a discussion on sustainable mobility innovation.

Please note that the site visit is open to a limited number of participants with advance registration.

12:00 – 13:30 WELCOME LUNCH

13:30–13:40 OPENING PLENARY

13:40–13:55 STATE OF PLAY IN 2023

As the automotive, transport and energy sectors embrace electric vehicles, manufacturers, generators and their construction partners face new challenges to meet demand at scale and speed. Where is momentum highest, and where is the global industry lagging? What are the critical unlocks for raw materials, production, infrastructure, circularity, and uptake? How must the industry evolve to accelerate zero-emissions technologies and achieve net-zero?

Speakers:

Steffen Fuchs, Senior Partner, McKinsey & Company

Martin Linder, Senior Partner, McKinsey & Company

Anna Herlt, Senior Partner, McKinsey & Company

13:55—14:15 INTERACTIVE DISCUSSION: CRITICAL ENABLERS TO ACCELERATE NET-ZERO MOBILITY

Meeting net-zero targets and consumer demand will require bold moves from the industry in factory construction, distribution strategy, raw material security, clean energy, and supply chain resilience. What are the pivotal actions we need to take now to enable sustainable mobility for decades to come? How can this coalition of industry leaders collaborate to effect real change?

14:15 – 14:25 FUTURE OF MOBILITY: BATTERY ELECTRIC VEHICLES

Speaker: **Peter Durante**, Managing Director and Head of Technology & Innovation, Macquarie Asset Management

14:25 – 14:35 FUTURE OF MOBILITY: FCEV LESSONS FROM THE ROAD

As fuel cell technology hits the road to power heavy-duty commercial vehicles, industry prognostication meets the requirements of real-world operations. Where do the two align and where do they diverge? How can OEMs and customers avoid pitfalls while maintaining the speed required to meet global decarbonization goals?

Speaker: **Parker Meeks**, CEO, Hyzon Motors

14:35 – 14:45 FUTURE OF MOBILITY: RETHINKING TRADITIONAL BUSINESS MODELS

The rapid rise of ZEVs has brought forth a paradigm shift in traditional business models – shifting many parts of the industry from simply delivering products to participating in interconnected systems across energy infrastructure, manufacturing, and user behavior. Is the traditional business model still fit for purpose? How can leaders navigate new questions around ownership and partnerships to optimize financial and sustainability outcomes?

Speaker: **Michael Colijn**, CEO, Heliox Energy

14:45 – 15:15 NETWORKING BREAK & GALLERY WALK

15:15 – 15:50 UNLEASHING THE SOURCE: DELIVERING PLANTS & GIGAPROJECTS

Global demand for zero-emissions vehicles could grow by around 30 percent by 2030. How can automotive manufacturers, suppliers, and the global zero-emissions transport sector accelerate megaproject development to meet booming demand? What actions can be taken to eliminate start of production delays? How can industry players best collaborate to deliver the critical assets needed to unleash these technologies?

Panelists:

Guillermo Martinez, Director, Europe Industrial and Logistics Sector Lead, Turner & Townsend

Kai Uwe Wollenhaupt, President Europe & SVP SVOLT Energy Technology Ltd., SVOLT Energy Technology (Europe) GmbH

Additional speaker to be confirmed

Moderator: **Martin Linder**, Senior Partner, McKinsey & Company

15:50 – 16:25 ACCELERATING DISTRIBUTION: EXPANDING INFRASTRUCTURE

Although demand for zero-emissions vehicles has climbed, the limited network of EV charging and alternative fueling stations remains a deterrent. Governments have set ambitious goals to build out the necessary charging infrastructure, but high capex, space requirements, and network design remain challenges to overcome in rollout. How can infrastructure be installed at the rate required to meet demand? How should networks be laid out to best serve consumers? What can the public and private sectors do to fuel the growing ZEV fleet?

Panelists:

Miko de Haan, President Blink Europe and Emerging Markets, Blink Charging

Elen Macaskill, Chief Customer Officer, bp pulse

Lorna McAtear, Head of Fleet, National Grid

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

16:25 – 17:00 RESILIENCE: HARNESSING CLEAN ENERGY TO POWER THE TRANSITION

The sustainability benefits of ZEVs will be largely contingent on lowering emissions from the electricity and hydrogen generation process. Decarbonizing the power and generation sector is thus integral to lessening emissions from cars and trucks. Today, only about 30 percent of electricity is generated from renewables and less than 1 percent of hydrogen is “green”. How are energy players planning to address these gaps and meet net-zero goals? What steps need to be taken to expand the grid, battery capacity, and clean fuel / hydrogen generation to meet the demands of ZEVs in the next decade?

Panelists:

Stefano Piscitelli, COO, Elcogen

Joël Meggelaars, Head of R&PA Benelux, Ørsted

Tamas Czikora, Head of Mobility, MOL Group

Moderator: **Anna Herlt**, Senior Partner, McKinsey & Company

17:00 – 17:15 CLOSING

18:30 – 19:30 RECEPTION

19:30 – 21:30 DINNER AND KEYNOTE DISCUSSION

Thursday, September 14

09:30 – 12:00 SECTOR ROUNDTABLES

GII will host three concurrent roundtables, encouraging participants to take a more in-depth look at critical opportunities in specific sectors.

1: MEETING THE DEMANDS OF NET-ZERO MOBILITY

The rising share of EVs will create additional demand for electricity generation, posing new challenges for managing power systems and renewable energy sources to support a clean transition. It is also creating new opportunities for technological disruption and data-driven methods of managing fleets, operating physical infrastructure, and shaping the customer journey. Increasing the supply of clean energy and tapping into innovative technologies will be therefore crucial for reaching EV transition targets. This roundtable will tackle questions including:

- What critical infrastructure or upgrades are needed now to ensure energy and resource demands are sustainably met in the mid- and long-term?
- How can the industry scale up digital and analytical innovation to facilitate the EV transition and support customer adoption?

- How can the build-out of required infrastructure be accelerated in the near-term, as the global supply chain and financial sectors prepare for potential slow down?
- How are the expected usage behaviours of consumers being integrated into the design of charging infrastructure and what is required to optimize charging capacity?

Speakers:

Attila Benedek, Transport Policy Advisor, European Parliament

Peter Durante, Managing Director and Head of Technology & Innovation, Macquarie Asset Management

Sarah Oey, General Manager e-mobility Europe, Shell

2: RESILIENT BATTERY SUPPLY CHAIN AND CIRCULARITY

The global BEV market has seen dramatic growth in the past decade, but to meet net-zero targets, battery manufacturing will need continue to grow almost 10x by 2030. Global demand for batteries is at an all-time high, and competition for resources is increasing across sectors. Preemptive steps are required to future-proof the battery supply chain and ensure long-term sustainability. This round table brings together leaders from across the battery supply chain to address critical questions, such as:

- Given growing demand for batteries, how do OEMs partner with suppliers and raw material producers to secure the required inputs?
- How can the global supply chain ensure sustainable procurement and management of battery raw materials and inputs?
- What enablers and standardization will support a cost-competitive and effective recycling program?

Speakers:

Steven Meersman, Founder Director, Zenobe Energy

Keith Norman, Chief Sustainability Officer, Lyten

Inga Petersen, Executive Director, Global Battery Alliance

3: HYDROGEN ROUNDTABLE: BUILDING THE BUSINESS CASE IN 2023

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. A coordinated approach is required to achieve reliability and cost-parity with other ZEV technologies. This roundtable will bring together leaders from across the hydrogen value chain to discuss:

- What infrastructure is required to enable widespread FCEV usage by 2025?
- How can projects be structured across their lifecycle to lower their cost of capital and increase reliability?
- What is the role of EPCs and equipment suppliers in accelerating scale?
- How should the ramp-up of fueling stations, distribution trucking, and vehicle adoption be coordinated through the transition?
- What collaboration is required to unlock infrastructure and attract investment?

Speakers:

Bryan Mandelbaum, Director of Hydrogen Solutions, Black & Veatch

Sara Schiffer, Managing Director, Hylane

Dr. Philip Severin, Senior Director Business Development, Linde
Stephan Herbst, Technical Head Hydrogen, Toyota Motor Europe

12:00 – 13:00 CLOSING AND NETWORKING LUNCH