

2020 Virtual GII Summit

June 10–11, 2020



Wednesday, June 10

10:00–10:10 WELCOME AND FRAMING

Hosts:

Gernot Strube, Senior Partner, McKinsey & Company; Co-chair, GII

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

10:10-10:25 THE IMPACT OF COVID-19 ON THE ECONOMY AND INDUSTRY

The coronavirus is not only a health crisis of immense proportion—it's also an imminent restructuring of the global economic order. To navigate this disruption, we need to respond promptly and reset amid the crisis. Leaders from across the infrastructure and capital projects value chain are scrambling to keep their employees safe, while ascertaining what this disruption means for their organization's finances, workforce, projects, supply chains, and operations. How do we prepare for the 'next normal' and reset the future of infrastructure and major projects?

Speaker: **Kevin Sneader**, Global Managing Partner, McKinsey & Company

Moderator: **Steffen Fuchs**, Senior Partner, McKinsey & Company

10:25–11:00 RESPONDING TO COVID-19: LESSONS FOR THE FUTURE

The impact of this global pandemic on our lives, jobs, and economies is unprecedented in modern history—and our responses have ranged from the prescient and coordinated to the reactive and improvisational. What are the biggest risks to the continuity of major projects and essential infrastructure during the COVID-19 crisis? What can we learn from how the infrastructure industry responded to the crisis? How do we protect our core business and workforce, while staying ahead of the next stage of the crisis?

Panelists:

Ehren Cory, President and CEO, Infrastructure Ontario

Lara Poloni, Chief Executive Officer EMEA, AECOM

Nicholas Wong, Partner, Clifford Chance

Moderator: **Robert Palter**, Senior Partner, McKinsey & Company

11:00–11:10 BREAK

11:10–11:45 RESETTING AMID COVID-19

Investment in infrastructure is likely to be a critical pillar of economic revitalization. But returning the businesses, projects, and supply chains to operational health will be immensely challenging. What will it take restart projects and reactivate supply chains across multiple disrupted geographies? How do we rethink our economic models, capital planning, and portfolio management? What needs to change to put stimulus money to work fast? How do we restore our workforce's productivity and rebuild customer confidence?

Panelists:

Deborah Flint, President and CEO, Greater Toronto Airports Authority

Michael Sabia, Chairman, Canada Infrastructure Bank

Jérôme Stubler, Chairman, Vinci Construction

Moderator: **Michael Della Rocca**, Partner, McKinsey & Company

2020 Virtual GII Summit

June 10–11, 2020



11:45–12:20 INTEGRATING THE PRE-COVID-19 AGENDA INTO THE NEXT NORMAL

While the current crisis threatens to exacerbate the industry’s productivity challenge, it could provide the impetus to reimagine and reform our industry. How do we accelerate technology adoption? What new skills and capabilities will be essential to shape and deliver the projects of the future? How do we overcome industry barriers to collaboration? What no-regret steps can we take to make the industry more sustainable and future-proof infrastructure?

Panelists:

Charles Emond, President & CEO, CDPQ

Alexandre L’Heureux, Chief Executive Officer, WSP

Robert Painter, Chief Executive Officer, Trimble

Moderator: **Katy George**, Senior Partner, McKinsey & Company

12:20–12:30 THE BEST IDEAS AND CLOSING

Hosts:

Gernot Strube, Senior Partner, McKinsey & Company; Co-chair, GII

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

2020 Virtual GII Summit

June 10–11, 2020

Thursday, June 11

10:00–10:10 WELCOME AND FRAMING

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

10:10–11:50 SECTOR ROUNDTABLES

GII will host six concurrent sector roundtables, giving participants an opportunity for an in-depth interactive discussion in their chosen sector.

ENGINEERING, CONSTRUCTION, AND BUILDING MATERIALS

Resetting to win in the future construction ecosystem

The global pandemic is accelerating emergent disruptive trends that affect the engineering, construction, and building materials (ECB) sector. How can ECB players navigate this crisis while making bold moves to establish a winning position for the future? How will the value and profit pools shift in the future construction ecosystem? What no-regret actions can companies take now to succeed beyond the crisis?

Discussion leaders:

Greg Bentley, Chief Executive Officer, Bentley Systems

Nirvan Nuckchedee, Consultant, Spencer Stuart

Bob Pragada, President and Chief Operating Officer, Jacobs

Facilitators:

Maria Joao Ribeirinho, Partner, McKinsey & Company

Jan Mischke, Partner, McKinsey & Company

ENERGY AND RESOURCES

Leaning on collaboration for post-pandemic recovery

Although collaboration is acknowledged as a key component of successful project delivery, it has not been widely adopted across the energy and resources sector. Amid the COVID-19 crisis, how can owners and contractors in the sector collaborate to improve execution efficiency, resilience, and deliver mutually beneficial outcomes? How can governance, partnerships, and project controls evolve to increase collaboration and better allocate risks in this uncertain and risk-averse environment?

Discussion leaders:

Ian Edwards, Chief Executive Officer, SNC-Lavalin

Anders Lindberg, EVP, Offshore Wind EPC & QHSE, Ørsted

David O'Connor, Head of Global Projects, BP

Facilitators:

Piotr Pikul, Partner, McKinsey & Company

Koen Vermeltfoort, McKinsey & Company

10:10–11:50 SECTOR ROUNDTABLES (continued)

GII will host six concurrent sector roundtables, giving participants an opportunity for an in-depth interactive discussion in their chosen sector.

INFRASTRUCTURE INVESTMENT

Emerging stronger and more resilient from COVID-19

The COVID-19 crisis is affecting each of the traditional infrastructure investment sectors in distinct ways. What are the cross-cutting themes and actions that owners and investors can take to emerge stronger from the crisis? How will the ‘next normal’ shift investment priorities, including building portfolio resilience? What public–private investment opportunities exist to accelerate the recovery?

Discussion leaders:

Sir Danny Alexander, Vice-President, AIB

Jim Barry, Chief Investment Officer, BlackRock Alternatives Investors and Global Head of BlackRock Real Assets

Hamish Mackenzie, Global Head of Infrastructure, DWS

Laurie Mahon, Vice Chair U.S. Investment Banking, Canadian Imperial Bank of Commerce

Facilitators:

Aaron Bielenberg, Partner, McKinsey & Company

Marcel Brinkman, Partner, McKinsey & Company

REAL ESTATE

Taking actions to adapt to real estate’s ‘next normal’

Physical distancing due to COVID-19 has changed the way people inhabit and interact with physical space, creating an unprecedented crisis for the real estate industry. What should real estate leaders do now to respond to the immediate threat, while laying the groundwork to tackle long-term challenges? How can we use digital design, customer experience, and advanced analytics to strengthen the important relationships with employees, investors, and end users? What strategies can we take to differentiate our assets, build portfolio value, and change the economics of real estate?

Discussion leaders:

Jay Cross, President, Related Hudson Yards, Related Companies

Sylvain Fortier, Chief Investment & Innovation Officer, Ivanhoé Cambridge

Gianluca Racana, Director, Zaha Hadid Architects

Facilitators:

John Means, Partner, McKinsey & Company

Rob Palter, Senior Partner, McKinsey & Company

2020 Virtual GII Summit

June 10–11, 2020



10:10–11:50 SECTOR ROUNDTABLES (continued)

GII will host six concurrent sector roundtables, giving participants an opportunity for an in-depth interactive discussion in their chosen sector.

TRANSPORT INFRASTRUCTURE

Reimagining passenger-transport infrastructure for resilience

Reopening passenger services and regaining customer trust amid COVID-19 presents an opportunity to comprehensively reimagine a more resilient public transport system. How can existing operations be adjusted to balance physical-distancing needs with increasing traffic volume? What modifications to existing infrastructure are required in the short and longer term? How do we adapt the business and financing models to ensure the resilience of operator?

Discussion leaders:

Isabel Dedring, Global Transport Leader, Arup

Sean Donohue, Chief Executive Officer, Dallas Fort Worth Airport

Rolf Erfurt, Chief Operating Officer, Berliner Verkehrsbetriebe

Emmanuel Jaclot, EVP and Head of Infrastructure, CDPQ

Facilitators:

Carsten Lotz, Partner, McKinsey & Company

Shannon Peloquin, Partner, McKinsey & Company

URBAN MOBILITY

Accelerating urban-mobility priorities amid COVID-19

Cities across the world have identified mobility as key to achieving their targets for lower CO2 emissions, improved economic growth, equity, and overall livability. How can cities overcome the pandemic-caused challenges and seize the moment to shape the mobility system of the future? What is needed to accelerate new modes of transportation and the supporting policy and infrastructure redesign? How can cities use stimulus programs to support underfunded integrated-mobility solutions?

Discussion leaders:

Jacqueline Gooch, Head of Department, Transport and Public Works, Western Cape Government

Carlo Ratti, Architect and Designer, Carlo Ratti Associates

Stephanie Wiggins, Chief Executive Officer, Southern California Regional Rail Authority

Facilitators:

Andreas Breiter, Partner, McKinsey & Company

Stefan Knupfer, Senior Partner, McKinsey & Company

11:50–12:00 GII VIRTUAL SUMMIT CLOSING

Speaker: Roundtable Host