



Global Infrastructure Initiative

2025 GII Summit Agenda

Four Seasons Hotel Los Angeles At Beverly Hills

300 S Doheny Dr, Los Angeles, CA 90048, United States

All times in PST

Monday, September 8

18:00–20:00 WELCOME RECEPTION *(optional)*

Optional cocktail reception for Summit participants arriving the day before from international destinations. Registration and badge pick-up will be available.

Tuesday, September 9

7:00 REGISTRATION OPENS

7:00–9:00 BREAKFAST

9:00–13:00 LOS ANGELES 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 LA's leading organizations. Please note that availability is limited and the visits are exclusively for Summit participants. Actual start times vary by location. A detailed briefing will be distributed to registered site visit participants in advance of their visit.

- **Los Angeles Department of Water and Power**
The Los Angeles Department of Water and Power (LADWP) is the largest municipal utility in the U.S., delivering 8,100 megawatts of electric capacity and 435 million gallons of water per day to more than four million residents and local businesses. This site visit will explore the LADWP's groundwater basins and groundwater remediation project at Tujunga, a vital source of water supply for the city of Los Angeles, and the Sylmar Converter Station, an 846-mile transmission system that connects Southern California to the hydroelectric and wind generation resources of the Pacific Northwest.
- **Los Angeles International Airport**
Los Angeles International Airport (LAX) is the eleventh busiest airport, serving 76.5 million passengers in 2024. Los Angeles World Airports, which owns and operates LAX, is undertaking a \$30 billion capital improvement program including major renovations to several terminals, runway improvements, a new satellite concourse, and an Automated People Mover (APM). Spread over 3,500 acres with four parallel runways and nine passenger terminals, this site visit will explore the airfield and the Flight Path Museum.
- **LA Metro Transit Center (MTC)**
LA Metro, is the agency that plans and operates funding for most of the public transportation system in Los Angeles County. This site visit will feature the new LAX/Metro Transit Center Station and its integration with the forthcoming Automated People Mover (APM), being delivered by Los Angeles World Airports, to provide a streamlined, airport-to-transit connection. Visitors will also receive a behind-the-scenes look at real-time operations of the Metro Transit Centre

(MTC), as the region prepares for global events such as the 2026 FIFA World Cup, the 2027 Super Bowl, and the LA 2028 Olympic and Paralympic Games.

- **Port of Long Beach**

The Port of Long Beach is one of the busiest ports in the nation, handling \$300 billion worth of trade annually and supporting 2.7 million jobs across the country. As part of a \$3.2 billion capital improvement program, this site visit will explore the Port's advanced, green terminal and new infrastructure projects such as the Long Beach International Gateway Bridge. It will also feature a variety of programs aimed at reducing the environmental impact of operations and a tour of the Port by boat.

- **SoCalGas [H2] Innovation Experience**

The [H2] Innovation Experience is North America's first-ever clean renewable hydrogen microgrid and home. It features clean renewable hydrogen production and storage along with a nearly 2,000 square-foot home that can draw power from solar panels and convert excess renewable electricity into clean hydrogen. Its renewable hydrogen microgrid can deliver reliable and renewable energy to more than 100 homes around-the-clock, rain or shine, even during power outages.

- **SoFi Stadium and Hollywood Park**

Hollywood Park spans nearly 300 acres and is the largest urban mixed-use development under construction in the Western United States. The mixed-use development centers around the 3.1 million square-foot SoFi Stadium. The largest stadium in the National Football League and one of Los Angeles' most striking architectural structures, SoFi Stadium is set to host eight FIFA World Cup '26 matches, Super Bowl LXI in 2027, and the Opening Ceremonies of the Olympic Games in 2028.

13:00–14:30 LUNCH

14:30–14:45 WELCOME AND INTRODUCTION

Speakers: **Ashwin Adarkar**, Senior Partner, McKinsey & Company; **Kelly Ungerman**, Senior Partner, McKinsey & Company

14:45–15:10 THE INFRASTRUCTURE MOMENT

Facilitators: **Alastair Green**, Senior Partner, McKinsey & Company; **Nicola Sandri**, Senior Partner, McKinsey & Company

15:10–15:50 PLENARY PANEL: THE NEXT TRILLION DOLLARS IN INFRASTRUCTURE

Infrastructure is experiencing a revolution. Now a \$1.3 trillion asset class, the sector is central to multiple global megatrends – from the energy transition to the digital boom. Where are the fastest-emerging pockets of growth? Which sectors, regions, and themes will define the next trillion dollars in infrastructure investment? What global changes are needed to unlock its full value?

Panelists:

Sir Danny Alexander, CEO of HSBC Infrastructure Finance and Sustainability, CIB
Gautam Bhandari, Co-Founder, Global Chief Investment Officer & Managing Partner, I Squared Capital

Laurent Germain, CEO, Egis

Moderator: **Alex Panas**, Senior Partner and Global Leader, Industry Sectors, McKinsey & Company

15:50–16:30 PLENARY PANEL: FIT FOR PURPOSE: FUTURE-PROOFING CRITICAL INFRASTRUCTURE

Much of the world grapples with the aging infrastructure. In the U.S., 43% of public roads are in poor or mediocre condition, and 40% of Europe's power grids are more than 40 years old. Leaders must efficiently prioritize and execute upgrades, leverage technology to address failures, and find financially viable paths forward. What is the right balance between tackling immediate needs and ensuring long-term resilience? What innovative solutions are key to future-proofing?

Panelists:

Shailen Bhatt, Chief Operating Officer US and LATAM, AtkinsRéalis

Jannine Miller, Executive Director, Georgia SRTA

Jamie Torres-Springer, President MTA Construction & Development

Moderator: Anthony Shorris, Partner, McKinsey & Company

16:30–16:45 TRANSITION BREAK

16:45–17:45 DISCUSSION SESSIONS

Participants select one of several concurrent discussion sessions:

1: CREATING TECH-DRIVEN BREAKTHROUGHS IN URBAN TRANSIT

Transit operators worldwide are investing in technology to breathe new life into legacy systems. In some cases, technology incrementally improves the safety and efficiency of traditional infrastructure; in others, it creates transformative shifts in reliability and cost performance. What opportunities and challenges arise from incorporating advanced technology into existing transit systems? What enablers can create a true step-change for cities and end-users?

Panelists:

Jean-Marc Arbaud, President & CEO, CDPQ Infra

Aymeric Sarrazin, President Digital & Integrated Systems, Alstom

Shashi Verma, Chief Technology Officer, Transport for London

Moderator: Jay Walder, Senior Advisor, McKinsey & Company

2: WILL AI SOLVE THE CONSTRUCTION PRODUCTIVITY PUZZLE?

Construction productivity has stagnated globally for decades, despite technological advancements and improvements by individual firms. Amid shrinking workforces, labor cannot compensate for low productivity growth. These challenges could result in a shortfall of construction output of up to \$40 trillion. What is the role of AI in catalyzing progress? How can AI-enabled improvements be adopted faster and scaled portfolio-wide?

Panelists:

Alaa Abu Siam, CEO, Americas, Egis

Dev Amratia, CEO and Co-Founder, nPlan

Jit Kee Chin, Chief Technology Officer, Suffolk

Usman Shuja, CEO Bluebeam and Executive Board Member, Nemetschek Group

Moderator: Daniel Ahmoye, Partner, McKinsey & Company

3: HARNESSING TECH TO DECARBONIZE REAL ASSETS

Building operations currently contribute over 25% of global combustion-related emissions. New technological tools and business models are emerging to improve the economics of decarbonization. But infrastructure leaders must also balance priorities amid economic pressures and a shifting policy landscape. What steps are

leaders taking to keep the decarbonization agenda on track? What actions are needed to unlock resilient solutions that can withstand disruption?

Panelists:

Geoff Chatas, Executive Vice President and Chief Financial Officer, University of Michigan

Edel Christie, Global President – Places, Digital Intelligence & Advisory, Arcadis

Kelly Meissner, Vice President, Corporate ESG & Sustainability, Ventas,

Sylvain Montcouquiol, Chief Resources & Sustainability Officer, Unibail-Rodamco-Westfield

Moderator: **Brodie Boland**, Partner, McKinsey & Company

4: EVALUATING RISK AND RETURN IN INFRASTRUCTURE'S NEW ERA

As our infrastructure world transforms, so do the opportunities and challenges in assessing risk and return. The rise of innovative projects, particularly those linked to the energy transition and digital infrastructure, demands that investors adapt their strategies to effectively evaluate and manage potential outcomes. Which strategies can improve assessment of risk and return both during diligence and during delivery of the investment thesis?

Panelists:

Riccardo Dutto, Managing Director, Head of Infrastructure Industry, Global Corporate Department, IMI Corporate & Investment Banking Division, Intesa Sanpaolo Group

Vittorio Lacagnina, Partner, Apollo Group Management

Miriam Rafiqi, Managing Director, H.I.G. Capital

Lincoln Webb, EVP & Global Head, Infrastructure & Renewable Resource Investments, BCI

Moderator: **Connor Mangan**, Partner, McKinsey & Company

17:45–18:00 TRANSITION BREAK

18:00–18:45 KEYNOTE INTERVIEW

Speaker: **Toks Omishakin**, California Secretary of Transportation

Moderator: **Tim Ward**, Senior Partner, McKinsey & Company

18:45–19:30 COCKTAIL RECEPTION

19:30–21:00 DINNER

Wednesday, September 10

7:00–9:00 BREAKFAST

9:30–10:00 WELCOME TO DAY 2

Speakers: **Alastair Green**, Senior Partner, McKinsey & Company; **Sal Arora**, Senior Partner, McKinsey & Company

10:00–10:50 PLENARY PANEL: MEETING THE ENERGY DEMANDS OF A DIGITAL WORLD

The U.S. is expected to be the fastest-growing market for data centers, reaching more than 80 GW of demand by 2030. This surge will create an unprecedented spike in power demand, straining the value chain as hubs struggle to access grids,

equipment, and labor. Where are the biggest gaps that require investment and action? Where are promising solutions emerging to meet burgeoning demands and accelerate growth?

Panelists:

Adaire Fox-Martin, CEO & President, Equinix

Marc Ganzi, CEO, DigitalBridge

Maria Pope, President & CEO, Portland General Electric

Moderator: **Pankaj Sachdeva**, Senior Partner, McKinsey & Company

10:50—11:15 TRANSITION BREAK

11:15—12:30 SOLUTION SESSIONS

Participants select one of several concurrent solution sessions:

1: DELIVERING THE AIRPORT OF THE FUTURE

Today's airports face a host of evolving imperatives. They are expected to deliver operational efficiency, distinctive passenger experiences, and efficient capital programs, all amid a volatile environment of rising costs and competition. How are global airport leaders tackling these intersecting challenges and opportunities? What is the role of technology, capabilities, and sustainability in defining the airport of the future?

Inspiring case study: **John Ackerman**, CEO, Los Angeles World Airport

Panelists:

John Ackerman, CEO, Los Angeles World Airports

Chris McLaughlin, CEO, Dallas Fort Worth International Airport

Tamara Vrooman, President & CEO, Vancouver International Airport

Moderator: **Vik Krishnan**, Senior Partner, McKinsey & Company

2: TRANSFORMING CAPITAL PROJECTS WITH GENERATIVE SCHEDULING

The capital project execution machine is broken, with the average megaproject exceeding its budget by 79% and running 52% behind schedule. Generative scheduling offers a promising solution, enabling the definition of strategies before and during construction, adapting to changes, and managing the site as a dynamic production system. How does generative scheduling compare to traditional approaches? What should project leaders consider when adopting generative scheduling tools?

Speakers:

Rene Morkos, Founder & CEO, ALICE Technologies

Mark Pitcher, Partner, McKinsey & Company

Moderator: **Ishaan Nangia**, Senior Partner, McKinsey & Company

3: BUILDING GRID CAPACITY AND RESILIENCE

The energy and digital transitions will place unprecedented demand on power grids. New technologies, regulatory strategies, and cross-sector collaborations will be essential to enhance stability, flexibility, and resistance to disruptions. What promising innovations are advancing grid capacity and resilience in the face of renewable integration, the power demands of AI, and rising climate risk? How can regulatory frameworks and targeted investments support and accelerate grid modernization?

Inspiring case study: **John Diklev**, Founder & CEO, Flower

Panelists:

Katie Aittola, SVP Enterprise Strategy & Chief Risk Officer, Duke Energy

Allan Danroth, President & CEO, Manitoba Hydro

John Diklev, Founder & CEO, Flower

Lutz-Christian Funke, Secretary General, KfW Bank Group

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

4: HARNESSING THE POWER OF CONNECTED INFRASTRUCTURE

In an age where connectivity is the norm, infrastructure assets are increasingly integrated—linking airports to city centers, leveraging rail networks for fiber, or connecting data centers to the grid. This requires strong coordination across a complex stakeholder network. What strategies in planning and orchestration can optimize the impact of integrated infrastructure? What technical, regulatory, and financial challenges need to be overcome to realize greater value?

Case study: **Japjeev Kohli**, Senior Vice President Technology and New Ventures, Transurban

Panelists:

Jumbi Edulbehram, Director, Smart Spaces & Global Public Sector, NVIDIA

Dylan Jones, Mobility & Transportation Leader, Cities Sector Leader, Principal, Gensler

Japjeev Kohli, Senior Vice President Technology and New Ventures, Transurban

Pierre Santoni, President – Infrastructure – EMEA, Parsons

Moderator: **Luca Milani**, Partner, McKinsey & Company

12:30–14:00 LUNCH

14:00–14:40 PLENARY PANEL: NAVIGATING GEOPOLITICAL COMPLEXITY

Amid rising geopolitical complexity, infrastructure is increasingly deployed as a strategic advantage – while also being deeply impacted by supply chain disruptions for batteries, silicon chips and other critical materials. How is infrastructure affected by global efforts to build geopolitical resilience? Where are infrastructure opportunities emerging from the establishment of new trade corridors? How can global leaders capture opportunities, make risk-adjusted decisions, and thrive?

Panelists:

Christopher Frost, Senior Managing Director, Macquarie Asset Management

Luba Nikulina, Chief Strategy Officer, IFM Investors

Jonathan Elkind, Former Assistant Secretary for International Affairs, U.S. Department of Energy

Moderator: **Jon Phillips**, CEO, Global Infrastructure Investor Association (GIIA)

14:40–15:20 PLENARY PANEL: PICKING UP THE PACE ON THE GLOBAL ENERGY TRANSITION

Global infrastructure and energy leaders are uniting in their commitment to sustainability, but rapidly achieving net-zero remains a daunting task. From expanding renewables to investing in grid infrastructure, the pace needs to quicken. What critical steps and considerations are essential for substantially accelerating the energy transition? How can stakeholders work together to plan, finance, and execute projects more swiftly?

Panelists:

Gene Gebolys, President & CEO, World Energy

Steve Powell, President & CEO, Southern California Edison

Fintan Slye, CEO, National Energy System Operator

Moderator: **Zak Cutler**, Senior Partner, McKinsey & Company

- 15:20–15:30 INSPIRING IDEA: RESTORING ESSENTIAL SERVICES BENEATH THE CITY’S SURFACE**
Following the Pacific Palisades Fire, one of the largest disasters to impact Los Angeles' power grid in history, the city has faced both challenges and breakthroughs in restoring essential services beneath L.A.'s surface. From the complex coordination of underground cable repairs to reimagining grid hardening strategies in fire-prone zones and launching an area-wide voltage upgrade, hear how LADWP is evolving to support the fastest rebuild in California history—with an emphasis on the indispensable role of the community in shaping a smarter, more responsive energy future.
Speaker: Janisse Quiñones, CEO and Chief Engineer, Los Angeles Department of Water and Power
- 15:30–16:10 PLENARY PANEL: DEVELOPING TRANSFORMATIVE LEADERSHIP**
In today’s volatile world, good leadership is more critical than ever. C-Suite leaders are tested daily on their ability to create value, understand new technologies and industry shifts, seek new perspectives, and empower others to perform. What does it mean to be a visionary leader in today’s infrastructure sector? How can each of us cultivate impactful infrastructure leaders of the future?
Panelists:
Tom Linebarger, Senior Advisor, General Catalyst
Natalia Shuman, President & CEO, MISTRAS Group
Robert Spurway, Managing Director & CEO, GrainCorp
Moderator: David Cowan, Global Energy, Infrastructure & Agribusiness Practice Leader, Spencer Stuart
- 16:10–16:50 PLENARY PANEL: CATALYZING PROGRESS ON GLOBAL MEGAPROJECTS**
Megaprojects—from high-speed rail networks to next-generation airports and cities—are reshaping the global landscape. However, the project development journey is not straightforward, with challenges including bankability, regulatory complexity, and stakeholder engagement. Where are common challenges and pockets of innovation emerging in major projects across the globe? How can new partnerships, technologies, and financing models play a role in catalyzing progress?
Panelists:
Carlos M. Brown, President of Dominion Energy Strategies, Services and Solutions; Executive Vice President, Chief Administrative and Projects Officer and Corporate Secretary, Dominion Energy, Inc.
Adam Copp, CEO, Infrastructure Australia
Nick Harris, CEO, National Highways
Moderator: Erikhans Kok, Senior Partner, McKinsey & Company
- 16:50–17:10 INSPIRING IDEA**
Speaker: Frank Klein, Chief Operating Officer, Rocket Lab
Moderator: Erikhans Kok, Senior Partner, McKinsey & Company
- 17:10–17:20 BEST IDEAS AND ACTIONS**
Recap of the best ideas, insights, and commitments from the 2025 GII Summit
- 17:20–17:30 DAY 2 WRAP-UP**
- 17:30–18:30 NETWORKING BREAK**

18:30–19:30 SUNSET RECEPTION
The Studios At Paramount

19:30–21:00 CLOSING DINNER
The Studios At Paramount

Thursday, September 11

7:00–9:00 BREAKFAST

09:00–12:00 SECTOR ROUNDTABLES
GII will host four concurrent sector roundtables, encouraging participants to take a more in-depth look at the most exciting topics in specific sectors.

1) PUBLIC SECTOR TRANSPORT: THE FUTURE OF RAIL

Technology has a transformative role to play in both the maintenance and modernization of existing rail systems and the creation of new, greenfield rail projects, setting the stage for a more sustainable and efficient transportation future. Innovations like predictive maintenance algorithms, remote monitoring, and further integration of AI are expected to play a vital role in enhancing efficiency and reducing downtime. This roundtable will explore a vision for the future of rail, including questions such as:

- How can technologies like A.I. and IoT be harnessed to predict and prevent maintenance issues, thereby enhancing safety and reliability?
- What role can public-private partnerships play in financing the integration of advanced technologies in rail infrastructure?
- What are the potential risks and challenges of deploying technology in rail maintenance, and how should leaders consider these in their operations strategies?

Inspiring case studies:

Massimiliano Ambra, Head of Business Development, Ferrovie dello Stato

Peter Reidy, CEO, KiwiRail

Doug Carr, President & CEO, Union Station Redevelopment Corporation

Panelists:

Massimiliano Ambra, Head of Business Development, Ferrovie dello Stato

Jacob Mumm, Head of Public Infrastructure, Bechtel

Anthony Phillips, Global Head of PPP and Head of Americas, John Laing

Peter Reidy, CEO, KiwiRail

Discussion leaders: **Nicola Sandri**, Senior Partner, McKinsey & Company; **Jared Katseff**, Senior Expert, McKinsey & Company

2) INVESTOR OPPORTUNITIES IN THE DATA CENTER ECONOMY

Over the next five to seven years, the world will need to triple the data center capacity built to date, requiring nearly \$7 trillion in capital outlays. This need is further compounded by the mismatch between market demand and supply, driven by constraints in power availability and the rapid growth of A.I. The sector's greatest opportunity and challenge will lie in bringing innovative solutions to market, with operators rethinking their land and power strategies and investors enabling value creation. This roundtable will delve into questions including:

- How is the data center ecosystem evolving, and what kind of disruptions are occurring throughout the value chain?
- How can colocation companies and investors adjust their business models and investment approaches to maintain and enhance their market positions?
- Where are potentially compelling investor opportunities in the data center value chain, and what strategies can investors explore to achieve diversified and sustainable returns?
- How could sustainability requirements and technological evolutions impact future risks and returns in this fast-growing sector?

Inspiring case studies:

Giordano Albertazzi, CEO, Vertiv

Heidi Boyd, Senior Managing Director, Blackstone

Aman Joshi, Chief Commercial Officer, Bloom Energy

Panelists:

Raouf Abdel, EVP Operations, Equinix

Juan Macias, CEO, AlphaStruxure

Buddy Rizer, Executive Director, Loudoun County, Virginia Economic Development

Discussion leaders: **Pankaj Sachdeva**, Senior Partner, McKinsey & Company

Alastair Green, Senior Partner, McKinsey & Company

3) DELIVERING GLOBAL ENERGY MEGAPROJECTS

In an era marked by more stringent cost-efficiency imperatives and challenging macroeconomic conditions, the focus of megaprojects has significantly evolved over the past two years. This roundtable discussion will explore the current global energy agenda, examine emerging challenges, and highlight innovative solutions that are effectively addressing the dual imperative of meeting energy demands while advancing decarbonization. This roundtable will delve into questions including:

- How are priorities shifting on energy megaprojects as stakeholders confront greater economic pressures?
- What insights can be drawn from recent successes and setbacks?
- What are the implications of these external shifts and industry learnings for the future roadmap of global energy megaprojects?

Inspiring case studies:

Jeremy Kinch, Chief Operating Officer, Primoris Services Corporation

Keith Norman, Chief Marketing & Sustainability Officer, Lyten

Robert Schuetzle, Chief Executive Officer, Infinium

Caroline Winn, Executive Vice President, Sempra

Panelists:

Jeremy Kinch, Chief Operating Officer, Primoris Services Corporation

Keith Norman, Chief Marketing & Sustainability Officer, Lyten

Robert Schuetzle, Chief Executive Officer, Infinium

Caroline Winn, Executive Vice President, Sempra

Discussion leaders: **Zak Cutler**, Senior Partner, McKinsey & Company; **Markus**

Wilthaner, Partner, McKinsey & Company

4) INFRATECH: WHAT'S REAL AND WHAT'S HYPE?

Infratech promises to revolutionize the way infrastructure is built and operated, but it's important to separate the signal from the noise. While investment continues to flow into Infratech, progress in uptake and outcomes has not been uniform. This roundtable will delve into questions including:

- What Infratech technologies and use cases are living up to their promises, and where has progress lagged?
- How can investors, founders, and corporates eliminate barriers to groundbreaking impact?

Inspiring case studies:

Paolo Franchetti, CEO, Franchetti SpA

Robin Riedel, Executive Vice President for Transformation and Future Mobility, Metropolis

Corinne Bulota, Vice-President Infrastructure, Energy & Materials Industry, Dassault Systèmes

Panelists:

Grant Allen, Venture Partner, Giant Ventures

Corinne Bulota, Vice-President Infrastructure, Energy & Materials Industry, Dassault Systèmes

John Kwaak, Founder & Managing Partner, Zero Infinity Partners

Robin Riedel, Executive Vice President for Transformation and Future Mobility, Metropolis

Discussion leaders: **Alberto Chiulli**, Associate Partner, McKinsey & Company

Mike Thompson, Senior Partner, McKinsey & Company

12:00–13:00 NETWORKING LUNCHEON