تحت رعاية صاحب السمو الشيخ محمد بن زايد آل نهيان، رئيس دولة الامارات العربية المتحدة

Under the patronage of His Highness Sheikh Mohamed bin Zayed Al Nahyan, President of the United Arab Emirates

ADIPEC أديبك
نادي الطاقة العالمي
Global Energy Club

Host
أدنــوك
ADNOC

3-6 November 2025, Abu Dhabi, UAE

Connecting the world's energy leaders

LEADERSHIP ROUNDTABLES

adipec.com/globalenergyclub

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Dear colleagues and partners

At a time when the world's energy landscape is being reshaped by innovation, policy, and collaboration, ADIPEC 2025 continues to serve as a global meeting place for ideas that drive progress.

The Leadership Roundtables represent the highest level of this exchange, where ministers, policymakers, and chief executives engage directly on the issues shaping our shared energy future. These private discussions bring together diverse perspectives in a setting designed to encourage mutual understanding and cooperation.

This year's roundtables reflect the evolving priorities of the global energy community: ensuring reliable and affordable supply, accelerating the deployment of low-carbon solutions, and harnessing the potential of artificial intelligence and digital technologies to enhance efficiency, resilience, and competitiveness. Each conversation contributes to the collective effort to strengthen resilience, encourage innovation, and deliver a more sustainable and inclusive energy system.

Thank you for taking part in these important discussions. I hope you find the environment at ADIPEC — and within the Global Energy Club — one that fosters collaboration, connection, and shared progress across geographies and generations.

Christopher Hudson
President
dmg events

Leadership Roundtables at ADIPEC: A Platform for Leadership, Insight, and Action

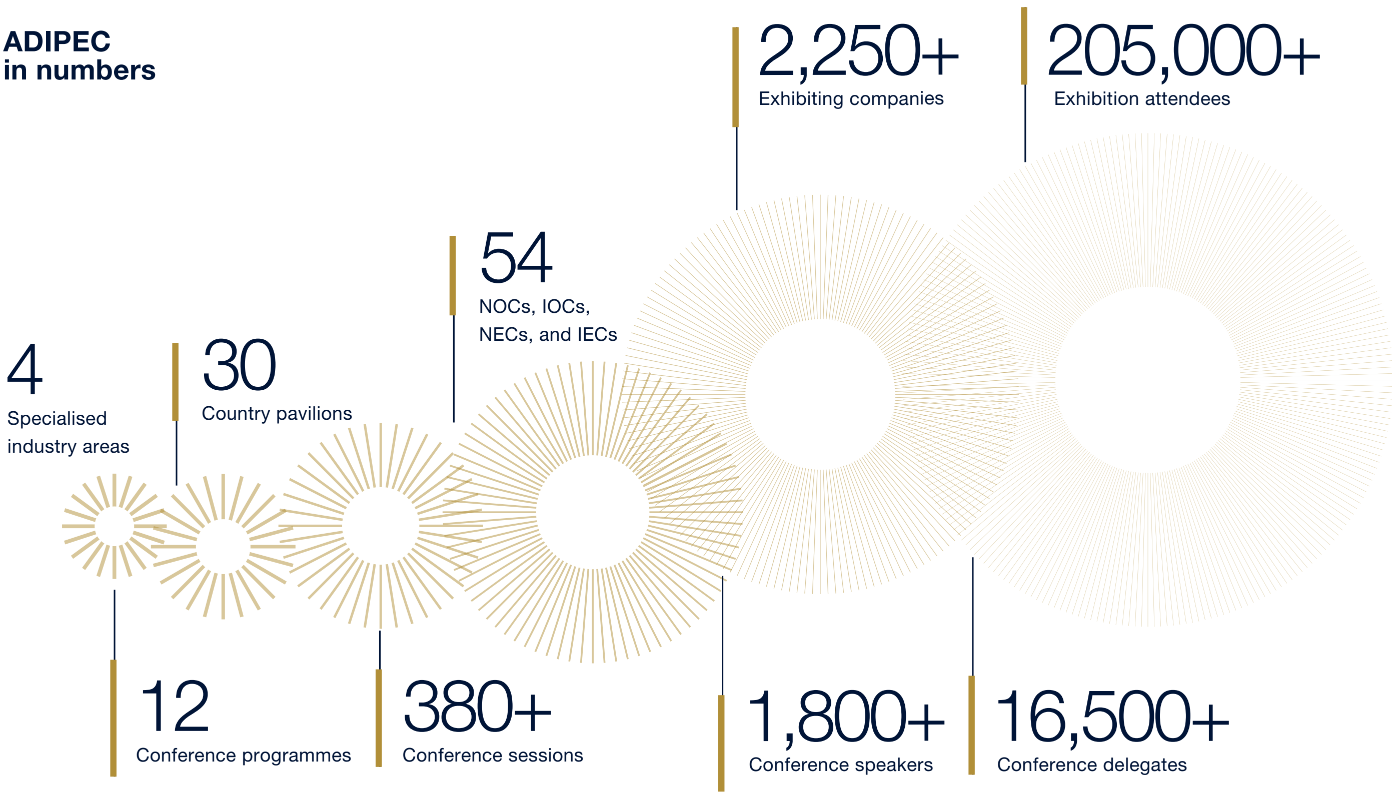
For more than four decades, ADIPEC has been the world's most influential meeting place for the energy industry, convening governments, policymakers, industry leaders, and innovators to advance energy security, accelerate transition pathways, and strengthen global prosperity.

The ADIPEC Leadership Roundtables are private, invitation-only discussions bringing together ministers, chief executives, and senior policymakers to address the defining challenges shaping the global energy system. Held under the Chatham House Rule, they provide a trusted setting for open exchange and collective problem-solving, fostering collaboration among the leaders guiding the industry's evolution.

In line with ADIPEC 2025's focus on resilience, innovation, and intelligent solutions, the roundtables will explore the priorities shaping the next phase of global energy progress, from maintaining secure and affordable supply to scaling low-carbon solutions and aligning policy and investment with technological advancement. Discussions will also consider how artificial intelligence and digital systems can enhance efficiency, resilience, and competitiveness across the value chain.

While the discussions are held in confidence, a short summary of key themes and outputs will be compiled following each roundtable. A further detailed summary will be shared across the wider energy community following the close of ADIPEC, fostering ongoing dialogue across the sector.

ADIPEC in numbers



A DUAL PLATFORM FOR GLOBAL ENERGY LEADERSHIP

This year, ADIPEC unites **two exclusive roundtable series — at the Global Energy Club** and **AI Zone** — creating spaces where decision-makers collaborate to accelerate innovation, resilience, and sustainable growth.

LEADERSHIP ROUNDTABLES AT THE GLOBAL ENERGY CLUB

Driving collaboration across the global energy system.

Held within the Global Energy Club, these Leadership Roundtables bring together ministers, policymakers, and industry leaders to exchange perspectives on the forces shaping global energy stability and growth. Discussions will focus on strengthening resilience, securing affordable supply, and unlocking investment and innovation across energy systems. Each session aims to foster understanding between producers, consumers, and partners, paving the way for practical cooperation and shared progress.

LEADERSHIP ROUNDTABLES AT THE AI ZONE

Exploring the intersection of intelligence, innovation, and energy.

Located in the AI Zone, this series of Leadership Roundtables brings together energy and technology leaders to explore how artificial intelligence is reshaping the future of energy. Conversations will address the opportunities and challenges of integrating AI across operations, governance, and the workforce — from improving system performance to ensuring ethical, transparent, and sustainable implementation. These sessions are designed to inspire collaboration and guide the responsible adoption of intelligent technologies across the global energy landscape.

How to get involved?

Participation is reserved for leaders shaping strategy at the highest level, including ministers, policymakers, and C-suite executives driving national energy policy, corporate transformation, and technological innovation. Invitations are extended through ADIPEC's Executive Committee, Global Energy Club, and Speaker Programme.

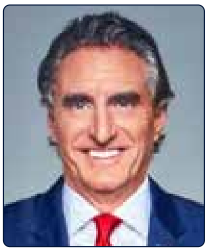
To express interest in future participation or partnership, please contact roundtables@adipec.com.

ROUNDTABLE THEMES

Energy security	Strategies for secure and affordable energy; reliability, resilience, and access.
Supply chain diversification	Strengthening resilience through collaboration and diversification.
Managing market volatility	Navigating risks and opportunities, especially in natural gas and LNG.
AI & digitalisation	Using AI, digital technology, and data to drive innovation.
Low-carbon transition	Accelerating sustainability and competitiveness across energy systems.
Investment & strategic capital allocation	Reframing investment for long-term growth.
Youth & workforce transformation	Empowering the next generation of energy leaders.
Empowering organisations	Building leadership and organisational capability for the future.
Future energy workforce	Attracting and reskilling talent for an AI-enabled energy future.
Board oversight and sustainability	The board's role in corporate responsibility and sustainability.
People side of AI	Enhancing culture, safety, and innovation through AI.
AI and sustainability	Balancing AI's promise with its energy demand.
Ai ethics	Governance and responsible AI adoption in energy.
Enterprise value	Driving performance and growth with AI.
Trust and transparency	Ensuring credibility in AI-driven transformation.
Protecting infrastructure	Securing critical energy assets in the digital era.
Overcoming hurdles	Addressing technical and cultural barriers to AI adoption.

A PLATFORM FOR THE LEADING MINDS IN GLOBAL ENERGY

A selection of confirmed participants

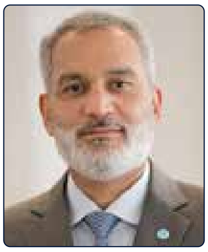


Doug Burgum
55th Secretary of the Interior Chair
Energy Dominance Council
United States

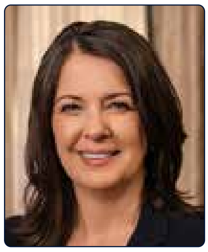
Sen. Dr. Heineken Lokpobiri
Minister for State (Oil)
Petroleum Resources
Nigeria

H.E. Karim Badawi
Minister of Petroleum & Mineral Resources
Arab Republic of Egypt

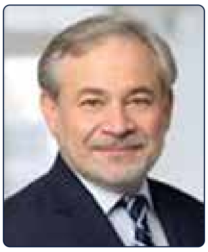
H.E. Yerlan Akkenzhenov
Minister of Energy
Kazakhstan



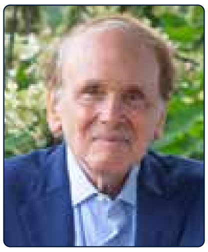
H.E. Haitham Al Ghais
Secretary General
OPEC



The Honourable Danielle Smith
Premier of Alberta
Canada



Dan Brouillette
15th Energy Secretary
United States

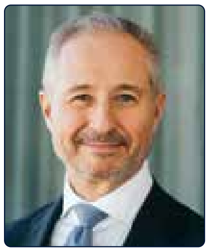


Dr. Daniel Yergin
Vice Chairman
S&P Global

Mark Thomas
Board Member & Group CEO
Bapco Energies

Bayo Bashir Ojulari
Group CEO
NNPC

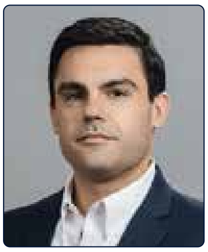
Montri Rawanchaikul
CEO
PTTEP



Alfred Stern
Chairman of the Board & CEO
OMV

Tayba Al Hashemi
CEO
ADNOC Offshore
ADIPEC 2024 Chairperson

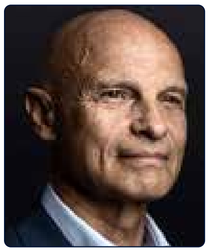
Russell Hardy
CEO
Vitol



Toby Z. Rice
President & CEO
EQT Corporation

Fatema Al-Nuaimi
CEO
ADNOC Gas

Ahmed El-Hoshy
CEO
Fertiglobe

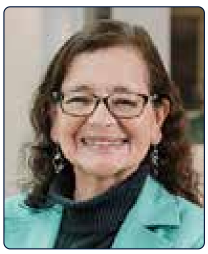


Torbjörn Törnqvist
CEO
Gunvor

Jun Arima
Chief Sustainability Officer
JOGMEC

Charlie Tan
CEO
Global Impact Coalition

Alex Tancock
CEO
InterContinental Energy



Dr. Jennifer Holmgren
CEO
LanzaTech

Eng. Ahmed Salem Aldhaheri
CEO
NMDC Energy

Christina Verchere
CEO
OMV Petrom

James Danly
Deputy Secretary of Energy
United States

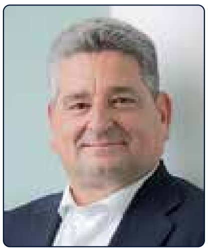
H.E. Suhail Al Mazrouei
Minister of Energy & Infrastructure
United Arab Emirates

H.E Dr. Mohamed Bin Mubarak Bin Daina
Minister of Oil & Environment, Special Envoy for Climate Affairs
Bahrain

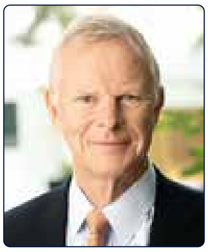
H.E. Saleh Kharabsheh
Minister of Energy and Mineral Resources
Jordan

His Excellency Jamal Essa Al-Loughani
Secretary General
Organization of Arab Petroleum Exporting Countries (OAPEC)

H.E. Jassim Alshirawi
Secretary General
IEF



Miguel Ángel López Borrego
CEO
thyssenkrupp AG

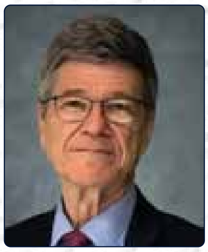


Roeland Baan
CEO
Topsoe

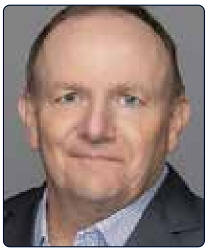
Jack Hidary
CEO
SandboxAQ

Roger Kearns
CEO
NOVA Chemicals

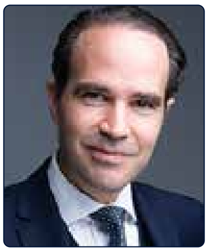
Vikas Kaushal
Chairman & Managing Director
HPCL



Dr. Jeffrey Sachs
President
UN Sustainable Development Solutions Network



Peter Zornio
CTO
Emerson



Amir Sharifi
Co-founder & Executive Committee member
Hy24

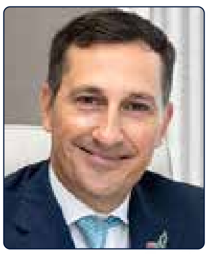
Mahmoud Suleiman
Chairman
NOC Libya

Jay Yu
Founder & Chairman
Nano Nuclear Energy Inc.

Harrison Lung
Group Chief Strategy Officer
e&

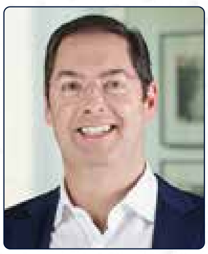
Ibrahim Al-Zu'bi
Group Chief Sustainability & ESG Officer
ADNOC

Khalid Al Bataineh
Managing Director
Basrah Gas Company



Massimo Falcioni
Chief Competitiveness Officer
Abu Dhabi Investment Office

Dr. Rainer Seele
President, Global Chemicals
XRG



Neil McMahon
Managing Partner
Kimmeridge

Charlotte Wolff-Bye
Chief Sustainability Officer
PETRONAS

Rick Christiaanse
CEO
Invest Alberta

DAY 1
MONDAY

12:00 – 13:30

Collaboration, diversification and innovation: securing global oil market stability

Global Energy Club | OPEC Leadership Roundtable

Knowledge Partner: KPMG

Hosted by: OPEC

12:30 – 14:00

Preparing for the future energy workforce: attracting, skilling and retaining for new global energy system

AI Zone

Knowledge Partner: EY Shape the future with confidence

14:30 – 16:00

AI ethics in the energy sector: governance, policies and best practices

AI Zone

Hosted by: Energy Intelligence

15:30 – 17:00

Strengthening energy security and resilience through diversification

Global Energy Club | Ministerial Leadership Roundtable

Knowledge Partner: S&P Global

16:30 – 17:30

From oversight to impact: the board's role in shaping corporate safety and sustainability excellence

AI Zone

Hosted by: أدنوك ADNOC

DAY 2
TUESDAY

09:00 10:30	**Advancing growth through innovation, low-carbon energy and decarbonisation** Global Energy Club	Knowledge Partner: KPMG Hosted by: NMDC GROUP
09:00 10:30	**The people side of Artificial Intelligence (AI): enhancing capabilities, safety, growth and innovation** AI Zone	Knowledge Partner: accenture
11:30 13:00	**Oil and Gas Decarbonization Charter Executive roundtable** Global Energy Club	Hosted by: OGDC
11:30 13:00	**Artificial Intelligence (AI) and sustainability: saviour or energy hog?** AI Zone	Knowledge Partner: EY Shape the future with confidence Hosted by: Utilidata
14:00 15:30	**Natural gas and LNG: navigating market volatility and supply security risks** Global Energy Club	Knowledge Partner: Wood Mackenzie
16:30 18:00	**Unlocking grid capacity: building a resilient, integrated energy ecosystem** Global Energy Club	Strategic Insights Partner: BCG Hosted by: e.O
16:30 18:00	**The new performance frontiers: unleashing AI to drive enterprise value** AI Zone	Knowledge Partner: accenture

DAY 3
WEDNESDAY

07:30 08:30	OGDC / OGMP 2.0 Executive roundtable on methane emissions Global Energy Club	Hosted by: OGDC Hosted by: OGMP
09:00 10:30	Accelerating low carbon hubs and technology for industrial competitiveness Global Energy Club	Knowledge Partner: Deloitte.
10:00 11:30	AI-driven energy transformation: building trust and transparency for success AI Zone	Knowledge Partner: EY Shape the future with confidence
11:30 13:00	The future of molecules and the implications for energy value chains Global Energy Club	Knowledge Partner: accenture
12:30 14:00	Protecting critical energy infrastructure in the AI age AI Zone	Knowledge Partner: accenture
14:00 15:30	Accelerating downstream and chemicals transformation globally Global Energy Club	Strategic Insights Partner: BCG
15:00 16:30	Mitigating technical and cultural hurdles to unlock AI's potential in the energy sector AI Zone	Knowledge Partner: EY Shape the future with confidence
16:30 18:00	Strategic capital allocation: redefining investment priorities in energy Global Energy Club	Strategic Insights Partner: BCG

DAY 4
THURSDAY

09:30
11:00

Youth and the energy workforce transformationW

Conference Room A

Knowledge Partner: Deloitte.

11:00
12:30

Empowering organisations for a future-ready energy sector

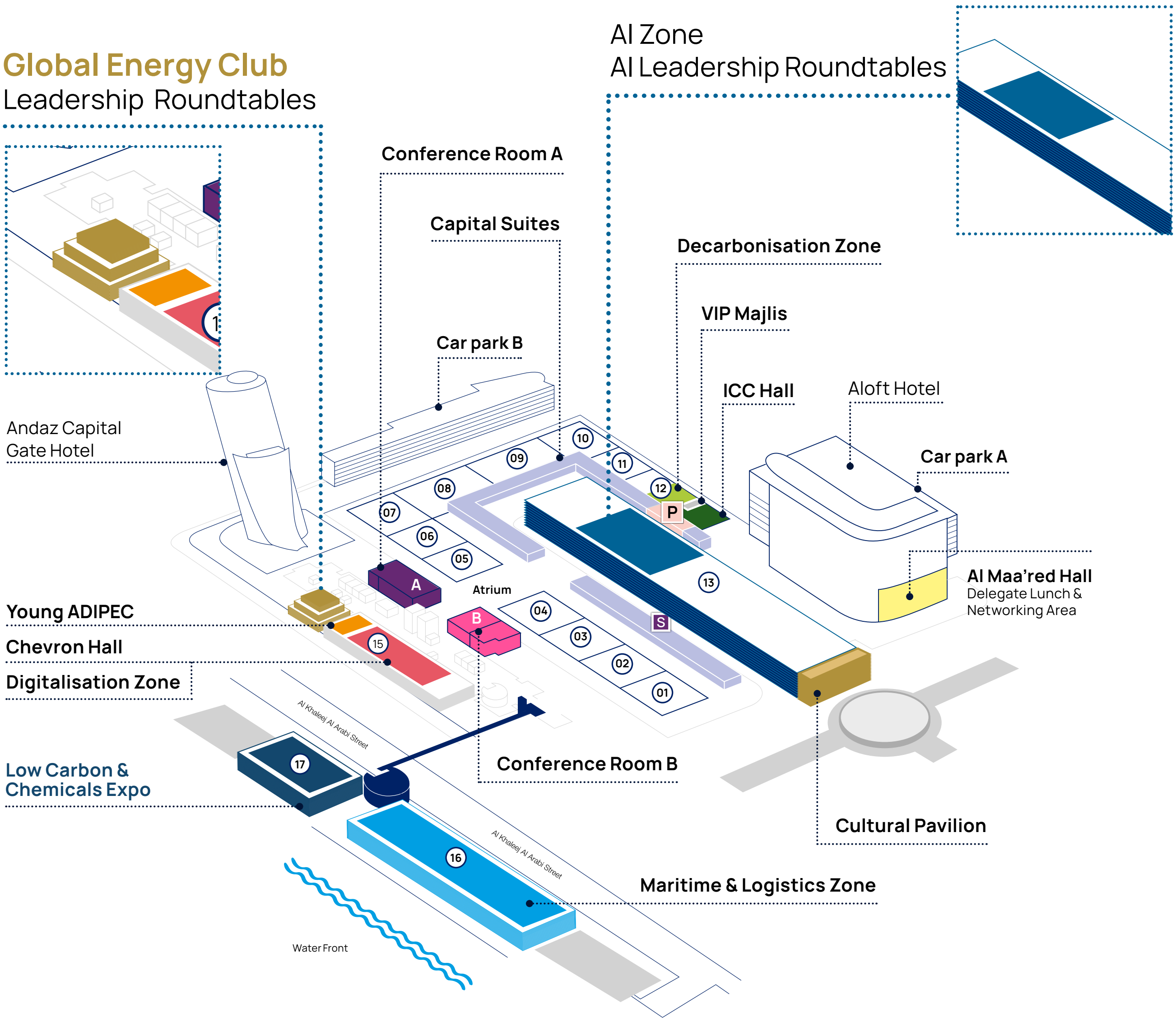
Global Energy Club

Knowledge Partner: KPMG

Hosted by: aramco

VENUE MAP

Leadership Roundtables locations



1 - 17 Exhibition halls

ICC Hall	Decarbonisation Zone
Global Energy Club Leadership Suite	Young ADIPEC
Conference Room A	Capital Suites - Mezzanine Level
Conference Room B	AI Zone AI Leadership Suite
Low Carbon & Chemicals Expo	P Press Centre
Maritime & Logistics Zone	VIP Majlis - ICC (Hall 12)
Digitalisation Zone	Al Maa'red Hall Delegate Lunch & Networking Area

SESSION NARRATIVES

GLOBAL ENERGY CLUB ROUNDTABLES	LOCATION: LEADERSHIP SUITE 2ND FLOOR, GLOBAL ENERGY CLUB
AI ZONE ROUNDTABLES	LOCATION: AI LEADERSHIP SUITE MEZZANINE LEVEL, AI ZONE, HALL 13

DAY 1 | MONDAY 3 NOVEMBER 2025

12:00 – 13:30	Collaboration, diversification and innovation: securing global oil market stability	Hosted by:	Knowledge Partner: KPMG

OPEC Leadership Roundtable

Global Energy Club

Oil market stability is absorbing impacts from a complex and rapidly evolving global landscape shaped by a combination of supply-demand imbalances, geopolitical challenges and macroeconomic uncertainty. Successfully managing market stability requires agility, proactive data-driven strategies, and the ability to adapt to heightened volatility on a global scale. Global collaboration among governments, producers and other stakeholders will be needed to proactively mitigate risk in the face of geopolitical and macroeconomic uncertainty, to direct disciplined investment, and to ensure ongoing alignment with sustainability agendas. Success will depend on anticipating disruptions and integrating real-time analytics to ensure competitiveness in a global market environment where unpredictability is the new norm.

ATTENDEE INSIGHTS:

This Leadership Roundtable will convene government officials and leading industry executives to discuss the future of oil market stability, collaborative mechanisms for market resilience, and strategies to meet rising global energy demand, particularly focusing on economic growth, and emerging markets.

Host

His Excellency Haitham Al-Ghais
Secretary General
OPEC

Moderator

Dr. Christopher Young
Managing Director
KPMG

12:30 - 14:00	Preparing for the future energy workforce: attracting, skilling and retaining for new global energy system	Knowledge Partner: EY Shape the future with confidence

AI Leadership Suite

AI Zone

The energy sector is rapidly shifting toward a more technology-driven and lower carbon future with AI, data, and digitalisation at the heart of the transformation. To attract and prepare a digitally skilled workforce, the energy sector will need innovative and inclusive strategies to close the skills gap, modernise the workplace, and highlight opportunities for meaningful careers and growth. Adopting a skills-focused talent strategy allows energy companies to invest in partnerships and outreach opportunities through internships, training programmes, and sponsorships that build essential digital competencies. Digital collaboration tools, gamified learning, and remote work options can help make the sector more attractive to native digital professionals who value flexibility and innovation.

Promoting career paths involving AI, IoT, and advanced analytics can attract talent looking for growth and impact. Robust internal training and partnerships with educational institutions can also help develop both new and existing skilled workers. Designing hiring and training programs with inclusivity in mind, will help create a more diverse and resilient workforce.

ATTENDEE INSIGHTS:

This AI Leadership Roundtable will explore how AI is transforming the future of work in the energy sector. Discussions will highlight the importance of collaboration between industry leaders, educational institutions, and youth organisations in preparing the next generation of energy professionals.

Moderator

Katherine Verrier Frechette
Partner
EY

14:30 - 16:00	AI ethics in the energy sector: governance, policies and best practices	Hosted by: Energy Intelligence

AI Zone

AI is transforming the global energy sector by optimising production, improving grid efficiency and reliability, accelerating renewable integration and enabling smarter consumption. However, its deployment demands a harmonised approach that prioritises ethical governance, adaptive policies and globally aligned best practices to ensure responsible innovation. Ethical AI governance must establish algorithmic fairness and evidence-based results, including standardised bias audits and reporting metrics, data governance and cybersecurity measures for sensitive energy consumption data, and human oversight to maintain accountability for AI-driven decisions. International collaboration will be key to coordinating energy sector standards, such as the EU's AI Act, the US Frontiers in Artificial Intelligence for Science, Security and Technology (FASST) initiative, certification schemes for energy-efficient AI systems and legal liability frameworks. Best practices should ensure transparency in AI-driven decisions about renewable energy projects, promote critical public engagement to energy transformation success, and implement proactive cybersecurity measures. To succeed, policymakers, energy leaders, and innovators must collaborate to build real trust, safeguard public interests, and maximise AI's positive impact on energy security, affordability and sustainability.

ATTENDEE INSIGHTS:

This AI Leadership Roundtable will delve into the ethical dimensions of AI deployment within the energy sector, highlighting the need for robust governance frameworks, adaptive policies, and internationally aligned best practices. Attendees will explore strategies to foster transparency, accountability, and inclusivity in AI systems, aiming to build public trust and support the sustainable transformation of the energy landscape.

Moderator

Haissam Akhras
Chief Technology Officer
Energy Intelligence Group

15:30 - 17:00	Strengthening energy security and resilience through diversification	Knowledge Partner: S&P Global

Ministerial Leadership Roundtable

Global Energy Club

Governments around the world are placing energy security at the top of the agenda in response to rising geopolitical challenges, rapid technological shifts, and increasing market volatility. To balance the need for reliable, affordable and secure energy today with long-term decarbonisation goals, governments are diversifying both energy sources and suppliers. This includes accelerating the rollout of clean and renewable technologies, advancing nuclear energy, expanding the use of low-carbon fuels, and increasing resilience against cyber threats.

In parallel, efforts are being made to reinforce supply chains – by securing critical minerals, and addressing vulnerabilities exposed by recent global disruptions. Meeting these challenges will require coordinated national strategies and strengthened international cooperation.

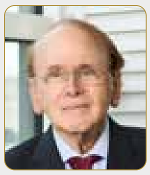
ATTENDEE INSIGHTS:

This high-level session will gather global ministers to explore practical solutions for energy security, diversification, and the evolving energy landscape. Discussions will focus on the impact of geopolitics, shifting trade and demand patterns, and how collaboration and effective policy can support resilient, inclusive and tangible energy progress.

Host

His Excellency
Suhail Mohamed Al Mazrouei
Minister of Energy and Infrastructure
United Arab Emirates

Moderator



Dr. Daniel Yergin
Vice Chairman
S&P Global

DAY 2 | TUESDAY 4 NOVEMBER 2025

09:00 - 10:30 | Advancing growth through innovation, low-carbon energy and decarbonisation

Hosted by: NMDC GROUP | Knowledge Partner: KPMG

Global Energy Club

To advance decarbonisation, energy leaders must embed sustainability into core operations, investment strategies, and innovation agendas, particularly across hard-to-abate sectors. Delivering these commitments will require credible execution plans that address emissions, maintain energy security, and align sustainability strategies with commercial viability. There is no single pathway forward, but a combination of near-term enablers, such as CCUS, methane abatement, energy efficiency, and grid-scale storage, can deliver immediate impact. At the same time, scaling next-generation technologies including hydrogen, direct air capture, and small modular reactors, will be essential to building long-term resilience into the energy system. As the industry navigates capital constraints, geopolitical risk, and fragmented policy environments, pragmatic solutions, like circular economy strategies and regionally tailored approaches are vital. Overcoming systemic barriers to decarbonisation will demand cross-sector collaboration, clear investment frameworks, and a dual commitment to both sustainability and supply resilience.

ATTENDEE INSIGHTS:

This Leadership Roundtable will explore how energy producers and industrial leaders are embedding low-carbon strategies across value chains, addressing emissions and how region specific investment can support practical decarbonisation, including pragmatic pathways for accelerating decarbonisation across the energy system.

Host

Eng. Ahmed Salem Al Dhaheri
CEO
NMDC Energy

Moderator

Dr. Christopher Young
Managing Director
KPMG

09:00 - 10:30 | The people side of Artificial Intelligence (AI): enhancing capabilities, safety, growth and innovation

Knowledge Partner: accenture

AI Zone

The energy sector's greatest progress has always emerged from the interplay between technology and talent; two forces that continue to shape its future. Today, AI is accelerating that convergence, not merely as an automation tool, but as a transformative force redefining how work is envisioned and executed. Competitive advantage now lies in the seamless integration of AI with human expertise. Embedded into workflows, AI elevates decision-making, strengthens safety, and unlocks new avenues of operational excellence across the energy value chain. This is not about replacing people but amplifying them by empowering teams with sharper insights and enabling a shift toward higher-value, strategic work. When human ingenuity meets AI intelligence, the possibilities expand: predictive analytics to anticipate and prevent downtime, real-time insights to reduce risks in high-stakes environments, and data-driven strategies to accelerate growth while sustaining workforce engagement. AI becomes a force multiplier, helping people work smarter, safer, and more innovatively. Yet, realising this potential requires more than technology deployment. It calls for equipping employees with new skills, building trust in AI-enabled decisions, and embedding strong governance for responsible use. Without this focus on people, even the most advanced AI tools risk underdelivering.

ATTENDEE INSIGHTS:

This AI Leadership Roundtable will highlight lessons from across industries, exploring how energy companies can capture differentiated value by placing people at the centre of AI strategies. Discussions will examine how leaders can deploy AI to drive efficiency, strengthen safety, and foster innovation, building not just better operations, but stronger, future-ready organisations.

Moderator

Jessica Van Singel
Global Resources Talent & Organisation Industry Lead
Accenture

11:30 - 13:00

Artificial Intelligence (AI) and sustainability: saviour or energy hog?

Hosted by: Utilidata

Knowledge Partner: EY Shape the future with confidence

AI Zone

AI presents a fundamental paradox for the global energy sector: it is simultaneously driving unprecedented energy demand while also unlocking transformative efficiencies that are accelerating the global transformation of the energy system. AI's analytical power is critical for optimising renewable integration, grid resilience, and emission reductions. It has the potential, by some estimates, to drive efficiency gains that could cut global greenhouse gas emissions by 5-10% (equivalent to the EU's annual output) through predictive maintenance, smart load balancing, and accelerated clean energy permitting. However, the challenge lies in AI's rapidly growing energy appetite. US data centres alone are projected to consume nearly half of all new electricity demand by 2030, outpacing even heavy industry. This creates a critical question: can AI's climate benefits outweigh its substantial energy costs? Resolving this tension requires coordinated action across investment, regulation, and innovation to fully position AI as a driver of net-positive outcomes, advancing sustainability rather than becoming another obstacle to overcome.

ATTENDEE INSIGHTS:

In this AI Leadership Roundtable, attendees will debate practical strategies for maximising AI's decarbonisation potential while minimising its energy footprint, identify breakthrough technologies that align AI with net-zero goals, and develop frameworks for measuring and optimising AI's sustainability impact.

Host

Gary Hicok
Executive Board Chair
Utilidata

Moderator

Dr. Mauricio Bermudez-Neubauer
Partner, Climate Change & Sustainability Services
EY

14:00 - 15:30	Natural gas and LNG: navigating market volatility and supply security risks	Knowledge Partner: Wood Mackenzie

Global Energy Club

Natural gas continues to play a key role in global energy strategies, offering a reliable, flexible, and lower-carbon option that supports economic stability and energy security. However, the energy market is becoming increasingly complex. Global capacity is set to increase, raising the risk of oversupply. As more uncontracted volumes hit the spot market, LNG prices are expected to fall and volatility to rise. Geopolitical uncertainty and shifting trade dynamics continue to reshape global gas flows, raising supply security concerns. Growing competition between major demand centres such as the EU and Asia adds further pressure to an already fragile market, highlighting the need for stronger international cooperation to maintain stable supply amid growing uncertainty. At the same time, global decarbonisation targets are reshaping investment priorities. With renewables and energy efficiency gaining momentum, questions are emerging about the long-term role of natural gas in diversified energy portfolios as well as the risk of stranded LNG assets. In this evolving landscape, coordinated efforts between producers, consumers, and policymakers are vital to ensure gas remains part of a resilient, low-carbon energy future.

ATTENDEE INSIGHTS:

The leadership roundtable will bring together suppliers, traders, offtakers and policymakers to explore how to maintain secure and competitive gas supply amid market volatility, looking into flexible contracting structures, portfolio hedging strategies and new certification schemes. Discussions will also include upgrades and investment measures to ensure natural gas and LNG remain reliable, lower-carbon options in future energy systems.

Moderator

Simon Flowers
Chairman and Chief Analyst
Wood Mackenzie

16:30 - 18:00	Unlocking grid capacity: building a resilient, integrated energy ecosystem	Hosted by: eo · Strategic insights partner: BCG

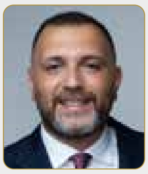
Global Energy Club

The global energy transition is entering a decisive phase. Surging demand from electric vehicles, industrial electrification, and data centers is converging with rapid renewable deployment. Yet ageing infrastructure, interconnection bottlenecks, supply chain fragility, and limited flexibility risk slowing progress. Unlocking grid capacity will require more than just new lines and substations. It demands a systemic approach that brings together critical minerals, advanced components, digital tools, scalable storage, flexible demand management, and integrated planning across the energy value chain. From copper and lithium to clean generation and downstream applications, every link must work together to deliver a clean, electrified future. Annual grid investment is expected to triple by 2050, but capital alone will not suffice. Success will depend on cross-sector partnerships, pragmatic policy reform, and new business models that accelerate the integration of renewables and emerging demand loads - while ensuring supply chains, financing, and enabling technologies are fit for purpose.

ATTENDEE INSIGHTS:

This Leadership Roundtable will examine how to transform today's constrained networks into high-capacity, flexible systems that support a resilient energy ecosystem. Discussions will cover scaling renewables while securing critical supply chains, harnessing digitalisation and storage to maximise grid capacity, and meeting rising demand from data centers, EVs, and industry. Participants will also consider the role of investors, policymakers, and multilateral organisations in enabling bankable pathways, and how oil & gas, utilities, mining, manufacturing, and technology providers can collaborate to unlock grid potential.

Host



Mohamed Hesham
CEO
ePointZero

Moderator

Dr. Oxana Dankova
Partner and Director
BCG

16:30 - 18:00	The new performance frontiers: unleashing AI to drive enterprise value	Knowledge Partner: accenture

AI Zone

In today's volatile energy landscape, companies face unprecedented board pressures to protect margins while navigating supply chain disruptions, evolving regulations, and geopolitical tensions. The era of relying on thousands of backward-looking KPIs is over.

Leading energy organisations are now uncovering AI-driven performance frontiers that go beyond traditional benchmarks, delivering competitive advantages, operational resilience, and entirely new ways for humans and machines to collaborate within innovative enterprise operating models.

ATTENDEE INSIGHTS:

In this AI Leadership Roundtable, attendees will examine how AI is transforming workflows to generate tangible business value, enhance resilience, and enable human-machine collaboration. The discussion will highlight strategies for performance reinvention that help organisations stay ahead in the rapidly evolving energy sector.

Moderator

Hector Rocha
Global AI Leader for Energy
Accenture

09:00 - 10:30	Accelerating low carbon hubs and technology for industrial competitiveness	Knowledge Partner: Deloitte.

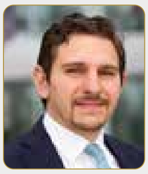
Global Energy Club

The energy landscape is shifting, demand is growing, and industrial competitiveness is now increasingly defined by a company's ability to navigate the energy trilemma - balancing security, affordability, and the adoption of low-carbon technologies. While the global conversation once focused solely on accelerating decarbonisation, today's leaders recognise that success depends on turning these challenges into opportunities for growth and differentiation. One key pathway to achieving commercially viable low-carbon technologies is by funnelling investment to scale up supply in regions with matching, growing demand. By co-locating supply and demand, low carbon hubs can bring down infrastructure costs and drive economies-of-scale, serving as an aggregation point for local demand before expanding transportation infrastructure to provide dispersed supply elsewhere in the country or for export. Bound by a specific region, representing a significant level of aggregated point-source emissions, and bringing together actors from across value chains and sectors, hubs sit at the intersection of customers, geography, and collaborators that enable organisations to maximise value and drive down costs. Ultimately, scaling these low carbon hubs, technologies and business models will depend on stronger international cooperation, targeted policy support, and innovative financing mechanisms that can drive replication and impact across markets.

ATTENDEE INSIGHTS:

This Leadership Roundtable will examine how industrial leaders can leverage low carbon hubs as a mechanism to scale low-carbon technologies by addressing deployment barriers. Discussions will focus on financing mechanisms, demand aggregation, and the industry collaboration needed to bridge cost and supply chain gaps, and to accelerate competitiveness in a decarbonising economy.

Moderator



Tarek Helmi
Global Leader
Low Carbon Solutions
Deloitte

10:00 - 11:30	AI-driven energy transformation: building trust and transparency for success	Knowledge Partner: EY Shape the future with confidence

AI Zone

The rapid adoption of AI across the energy sector creates a fundamental challenge: how can we ensure these powerful technologies earn public trust and acceptance? Without transparency and responsible governance, even the most advanced AI systems will face resistance, limiting their potential impact on global energy transformation. Successful AI implementation requires three critical elements: explainable decision-making processes that stakeholders can understand, robust accountability mechanisms that clarify responsibility, and ethical frameworks that align with societal values. Energy companies must move beyond viewing these as compliance burdens and recognise them as strategic investments that drive competitive advantage. Practical approaches include implementing real-time monitoring dashboards that reveal AI operations, commissioning independent third-party audits of algorithms, conducting thorough impact assessments before deployment, and establishing clear risk management protocols. These measures build confidence among consumers, regulators, investors, and communities, all essential partners in the energy transformation journey. Energy organisations that prioritise transparent governance, ethical guardrails and collaborative innovation will lead to a pragmatic AI-driven energy system.

ATTENDEE INSIGHTS:

This AI Leadership Roundtable will focus on establishing trust and transparency in AI-integrated energy systems by addressing technical, ethical, and operational challenges. Discussions will cover the implementation of explainable AI, real-time monitoring, third-party audits, and clear regulatory frameworks to ensure real accountability.

Moderator

Rui Bastos
Partner
Risk Consulting
EY

11:30 - 13:00 | The future of molecules and the implications for energy value chains

Knowledge Partner: accenture

Global Energy Club

Global energy demand has risen steadily for two centuries and is projected to grow another 20%-30% by 2050. Throughout history, transitions have occurred within a broadening energy mix, from timber to coal, oil, and gas, and now toward renewables and low-carbon molecules. Oil and gas will remain central for decades, while hydrogen, ammonia, bioenergy, synthetic fuels, and electrification are expected to reach comparable scale. The strategic challenge for energy leaders is reshaping value chains to integrate multiple energy carriers into a unified global system managed by relatively few players. Supermajors and national oil companies are repositioning portfolios, embedding net-zero strategies, and evolving into full-spectrum energy enterprises. Upstream assets are being repurposed for hydrogen and bio-feedstock, supported by carbon capture. Midstream networks are shifting toward CO_2, H_2, and ammonia transport. Downstream, refineries and retail networks are being reconfigured to deliver clean fuels and electricity, enabled by digital systems. This requires new power market capabilities, biotechnology, and advanced digital tools such as AI-driven trading and digital twins. Workforce re-skilling and secure access to critical minerals will be vital enablers. Achieving scale will require capital investment of $4 to $6.7 trillion annually by 2030, rapid innovation, and global policy alignment to close cost gaps and stimulate demand. Clear mandates, incentives, and carbon pricing will accelerate adoption.

ATTENDEE INSIGHTS:

This Leadership Roundtable will explore how the rise of new molecules is reshaping value chains, investment priorities, and business models. Discussions will examine integration strategies across upstream, midstream, and downstream, and the capabilities, policies, and financing needed to scale low-carbon molecules alongside traditional energy sources.

Moderator

Andrew Smart
EMEA Senior Managing Director Lead for Energy
Accenture

12:30 - 14:00 | Protecting critical energy infrastructure in the AI age

Knowledge Partner: accenture

AI Zone

As the energy sector undergoes a shift towards a more modern, digital and sustainable structure, its vulnerability to cyber threats, disinformation and deepfakes is being exposed. In 2024, ransomware attacks on the sector reportedly rose by up to 80%, with many critical vulnerabilities linked to the growing convergence of information technology and operational technology systems. The threats are varied. Disinformation campaigns aim to mislead the public, while attacks threaten critical infrastructure, trust and operational security. Deepfakes pose a growing challenge to communications and decision-making, exposing organisations to financial fraud, disruption of crisis response, supply chain breaches, and market manipulation. In response, solutions are emerging from AI-powered threat detection protocols and vendor cyber risk assessments to workforce training and awareness. Safeguarding energy infrastructure will require equal investment in technology upgrades and public trust strategies, including AI-based media monitoring, preemptive disclosures, and transparent collaboration with regulators.

ATTENDEE INSIGHTS:

This AI Leadership Roundtable will examine how energy companies can use AI solutions to detect disinformation, implement independent content audits and launch public awareness campaigns. Discussions will explore how industry collaboration with technology providers can promote responsible AI use, protect reputations and support a resilient, transparent energy system.

Moderator

Luis Parrondo
Managing Director
Accenture

DAY 3 | WEDNESDAY 5 NOVEMBER 2025

14:00 - 15:30 | **Accelerating downstream and chemicals transformation globally** | Strategic insights partner: BCG

Global Energy Club

Slowing demand growth, expanding capacity, and growing geopolitical and environmental pressures have pushed petrochemical margins to their lowest levels in over a decade. At the same time, producers face rising expectations to decarbonise and deliver lower-carbon, circular products, all while maintaining performance. To compete, leading players are rationalising assets, consolidating for scale, and expanding across the value chain, including upstream for feedstock security or downstream for specialisation. Rapid advances in digital and AI technologies are also helping modernise operations and unlock new efficiencies. Transformation is now imperative. Downstream leaders must balance long-term bets with near-term resilience, managing trade-offs across profitability, sustainability, and innovation. Today's decisions will determine who defines the future and who falls behind.

ATTENDEE INSIGHTS:

This Leadership Roundtable brings together leaders from top global petrochemical firms to explore how to reset cost structures, reshape global footprints, forge partnerships, and harness next-gen technologies. The discussions will focus on steering organisations through disruption while driving enduring transformation.

Moderator

Arun Rajamani
Managing Director & Partner
BCG

15:00 - 16:30 | **Mitigating technical and cultural hurdles to unlock AI's potential in the energy sector** | Knowledge Partner: EY Shape the future with confidence

AI Zone

Integrating AI across the global energy sector brings technical and cultural challenges, requiring a comprehensive implementation strategy to unlock its full potential for growth, efficiency and sustainability gains. On the technical side, barriers including incompatible legacy systems, data silos, and high upgrade costs that can slow down AI adoption. Cybersecurity risks from data manipulation and infrastructure attacks to supply chain threats are exacerbated by AI's expanded digital footprint. Culturally, many energy organisations traditionally favour operational stability and proven methods over experimental technologies, due to 30 to 50 years asset lifecycles and risk-averse norms. In turn, this creates hesitancy in adopting innovative AI solutions that are continuously evolving. Public concerns over data privacy and slow regulatory progress also contribute to uncertainty around algorithmic accountability and data sharing. Inconsistent standards across regions further complicate large-scale deployment. To successfully overcome these challenges, energy leaders and policymakers must align technology, workforce, and regulatory efforts. This means ensuring access to high-quality data, engaging operators early, building trust in AI systems, and scaling up proven solutions that address security, compliance, and infrastructure needs.

ATTENDEE INSIGHTS:

This AI Leadership Roundtable will examine how energy companies can successfully deploy AI by focusing on workforce training, data strategy, and skills development. Discussions will include real-world examples and lessons learnt, highlighting how AI can drive greater efficiency, innovation, and long-term sustainability in the sector.

Moderator

Eduardo Neto
Partner, Energy & Industrial
MENA
EY

16:30 - 18:00	Strategic capital allocation: redefining investment priorities in energy	Strategic insights partner: BCG

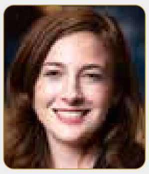
Global Energy Club

Capital allocation has become the defining challenge for today's energy leaders. The industry is entering an unprecedented $8 trillion build cycle, yet investment is unevenly distributed. Oil and gas companies are prioritising shareholder returns while scaling back reinvestment, whereas power and utilities are committing to super-cycle levels of capex that often exceed cash flow. Policy volatility, affordability concerns, and grid constraints are compressing delivery timelines and heightening risk. Adding to this complexity, AI is reshaping the investment landscape. Technology firms now outspend even the largest energy players on capital expenditure, while driving electricity demand growth at a scale the sector has never seen before. At the same time, investors are imposing higher return thresholds and stricter discipline, ensuring capital only flows to advantaged projects. The result is intensifying competition for funds, even amid surging energy demand.

ATTENDEE INSIGHTS:

This leadership roundtable will convene global financial institutions, energy leaders, and policymakers to explore how capital can be strategically deployed to build a resilient, future-ready energy industry. Discussions will examine innovative financing models, cross-border partnerships, and strategic diversification approaches that balance investor expectations with the practical realities of today's energy industry.

Moderator



Rebecca Fitz
Partner and Director,
Center for Energy Impact
BCG

09:30 – 11:00 Youth and the energy workforce transformation

Knowledge Partner: Deloitte.

Conference Room A

As emerging technologies, low-carbon solutions, and evolving business models take center stage, they are reshaping the very definition of success. The ambitions, values and creativity of young professionals entering the workforce are redefining what success and leadership look like for the next generation. Across the industry, a generational handover is underway. Experienced specialists are stepping back just as demand for new capabilities in AI, data analytics, automation and sustainability are surging in demand. This is not just a hiring challenge; it is a moment to reimagine how energy companies attract, develop, and retain talent. Companies must inspire the next wave of talent to view the energy industry as a long-term platform for innovation, purpose, and impact. This new generation seeks more than career growth - they seek meaning. They value purpose, inclusion, and impact, and they expect cultures that reflect their principles, empower learning, and provide visibility into leadership. To meet these expectations, energy organisations must evolve from offering jobs to creating purposeful career journeys that foster belonging and contribution from day one. Youth voices are not just the future of the sector - they are critical today. When empowered, young professionals bring new perspectives to legacy challenges, drive innovation, and challenge traditional models of leadership and collaboration. Embedding their input into leadership pipelines, project design, and organisational culture is key to building an agile, united, and future-ready workforce.

ATTENDEE INSIGHTS:

This Leadership Roundtable will bring together senior leaders and young professionals to discuss how the energy industry can position itself as an attractive and inspiring sector for graduates and early-career talent. Discussions will focus on how companies can build clear pathways for youth participation, develop the right skills, and empower young leaders to take meaningful roles in driving digitalisation, AI adoption, and the energy transition. The dialogue will explore how organisations can redesign workforce strategies to attract, develop, and retain talent, identify the skills required for a digital and sustainable future, and embed youth perspectives in innovation and transformation.

Moderator

Abhishek VS
Managing Director
Consulting
Deloitte

11:00 – 12:30 Empowering organisations for a future ready energy sector

Hosted by: aramco | Knowledge Partner: KPMG

Global Energy Club

As energy companies face a period of rapid transformation, driven by surging global demand, decarbonisation goals, new digital and AI technologies, and shifting workforce requirements, leadership adaptability and effective organisation design has never been more critical. Traditional leadership styles and hierarchical structures can slow innovation, growth and performance in diversified energy companies because they are not designed for agility. To succeed, energy companies must develop adaptive leadership styles, flatter and faster decision-making, enable matrix-based teaming, develop digital, AI and sustainability skills and foster a culture that focuses on purpose, flexibility, growth, learning, wellbeing, and inclusion, creating an organisation as future-ready as its energy ambitions. Ultimately, designing future-ready, people centric operating models that are both agile and scalable, enabled by adaptive leadership styles will be key to thriving in a rapidly evolving energy landscape.

ATTENDEE INSIGHTS:

This Leadership Roundtable will gather industry leaders to explore practical strategies for designing adaptive operating models that support scale, innovation, and resilience in a rapidly transforming energy landscape, including the ability to attract and retain top talent. The session will explore how major energy companies can realign their organisational structures and leadership styles to promote agile decision-making, cross-functional collaboration, and innovation across energy domains. Leaders will reflect on strategies for shifting hierarchical organisations toward leaner, tech-enabled networks that accelerate energy diversification & transition, while retaining core operational strengths, and fostering a new generation of talent to drive innovation and long-term resilience.

Host

Jumaan A. Zahrani
Director - Organisation
Consulting Department
Aramco

Moderator

Leslie Coutts
Partner, Advisory -
People Consulting
KPMG

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